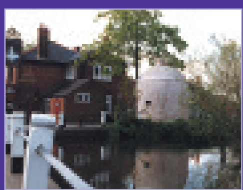
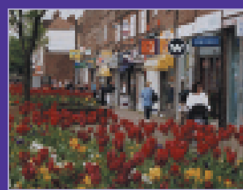
Hertsmere Local Development Framework

Town Centres and Shopping

July 2008

Hertsmere
Borough Council

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Contents

List of Tables and Figures

Appendices

1 Introduction

1.1 In line with Government guidance in Planning Policy Statement 6 (PPS6), 2005 – Planning for Town Centres, Hertsmere is undertaking a retail study of the six existing town and district centres. The primary purpose of the study is:

- To evaluate the health of the six existing town and district centres;
- To inform the preparation of the borough's Local Development Framework; and
- To provide guidance and advice to assist the Council in the evaluation and assessment of planning applications and proposals for retail development within the Borough in the future.

Study aims

1.2 The purpose of undertaking this study is:

- To examine the existing shopping patterns through a new on street shoppers survey and seek qualitative comments on the respective centres;
- To identify business needs through a postal survey from retailers and businesses;
- To undertake health checks of the six identified town centres (i.e. Borehamwood, Bushey High Street, Bushey Heath, Potters Bar Darkes Lane, Potters Bar High Street and Radlett; and
- To identify and assess the existing supply and future need, in quantitative and qualitative terms, for new retail floor space for comparison and convenience goods (and commercial leisure facilities in the Borough) to 2021.

Structure of the report

1.3 The remainder of the report, which was completed in July 2008, is structured as follows:

- Section 2 sets out the relevant policy requirements, including relevant national, regional and local planning documents;
- Section 3 addresses national trends in the retail and leisure sectors;
- Section 4 provides a description of current retail and business position, based on CACI data and the findings of the Retailer and Business Survey, and the Shopper Survey for each centre. Followed by a conclusion of the overall viability and vitality of each centre;
- A subsequent section 5 will include a review of current planning policy for the Site Allocations DPD, and will set out recommendations and strategy for new policy options for Hertsmere, which will be published at a later date.

2 Planning Policy Framework

2.1 This section looks at the principal themes of planning policy and the resulting framework within which local development plans and planning applications are developed, highlighting the main objectives of national, regional and local policy.

The Planning and Compulsory Purchase Act 2004

2.2 The Planning and Compulsory Purchase Act, 2004: places sustainability objectives at the heart of the planning system. The Act sets a statutory objective for local development plans to contribute towards the achievement of sustainable development by carrying out a formal strategic environmental assessment (SEA)/sustainability appraisal (SA).

Planning Policy Statement 1 (PPS 1): Delivering Sustainable Development, (February 2005)

2.3 PPS 1 sets out the overarching planning policies on the delivery of sustainable development through the planning system. In this Statement, the Government stresses that, amongst other things, the planning system needs to:

- Recognise that economic development can deliver environmental and social benefits;
- Make suitable land available for development in line with economic, social and environmental indicators;
- Promote urban and rural regeneration and promote mixed use developments;
- Provide improved access for all sections of the community to jobs, health, education, shops, leisure, community facilities, open space, sports and recreation;
- Promote more efficient use of land through higher density, mixed use development and the use of suitably located, previously developed land and buildings.

Planning Policy Statement 6 (PPS 6): Planning for Town Centres (March 2005) and proposed changes to PPS6 (July 2008)

2.4 PPS 6 focuses on promoting and sustaining town centres. Its central tenet is the need for a more proactive approach, through regional and local planning, to securing new investment in town centres and achieving more sustainable patterns of development. The PPS sets out the Government's key objectives for town centres as to promote their vitality and viability by:

- Planning for the growth and managing change and development of existing centres
- Promoting and enhancing existing town centres by focusing development in such centres and encouraging a wide range of services in a safe, good quality environment, which is accessible to all.

2.5 PPS 6 advises boroughs to define a hierarchy of centres. It classes city, town and district centres as town centres, recognising that the town centre(s) will usually be the principal centre(s) in a local authority area. The PPS recognises that in rural areas town centres are likely to function as important service centres. District centres are defined as normally comprising groups of shops, often with at least one supermarket or superstore and a range of non-retail services (e.g. building societies, banks, libraries and restaurants). Small parades of shops are of neighbourhood significance only and therefore not regarded as town centres in planning policy terms.

2.6 PPS 6 highlights that, in addition to retail uses (including warehouse clubs and factory outlets), it applies to other main town centre uses, including leisure, entertainment facilities, intensive sport and recreation uses; offices, arts, culture and tourism uses.

2.7 The PPS urges planning authorities to actively plan for growth and change in town centres, over their development plan, period by:

- Selecting appropriate existing centres to accommodate any identified need for growth by: (a) making better use of existing land and buildings; including where appropriate, redevelopment; and (b) extending the town centre where necessary;
- Planning for new centres of an appropriate scale in areas of significant growth or where there are deficiencies in the existing network;
- Managing the role and function of existing town centres by, for example, promoting and developing a specialist or new role and encouraging specific types of uses in some centres;

2.8 The current PPS 6 requires local planning authorities to set out its spatial vision and strategy for the network of town centres in its area by working in conjunction with stakeholders and the local community to:

- Assess the need for development, both quantitative and qualitative
- Identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including where appropriate, the scope for extending the primary shopping area and/or town centre, and identify centres in decline where change needs to be managed;
- Identify centres where development will be focused;
- Define the extent of the primary shopping area and the town centre.

2.9 PPS 6 advises that in addition to defining the primary shopping area, LPAs should also distinguish between the primary and secondary shopping frontages. It states that primary frontages should contain a high proportion of retail uses whereas secondary frontages provide greater opportunities for a range of different town centre uses. Subject to other planning considerations, residential and office developments should be encouraged as appropriate town centre uses above ground floor retail or leisure uses. A diversity of uses in a centre is considered to make an important contribution to its vitality and viability, as different but complementary uses during the day and evening can reinforce each other making town centres more attractive to local residents, shoppers and visitors.

2.10 For assessing qualitative need, PPS 6 advises that LPAs should have a range of sites and locations planned for which will allow for a genuine choice to meet the needs of the whole community. Further advice is also stated on what factors should be used when work is undertaken to measure the vitality and viability of town centres.

2.11 PPS 6 advises that LPAs should take a positive approach to strengthening local centres and planning for local shops and services by:

- Assessing where deficiencies exist in the provision of local convenience shopping and other facilities which serve people's day-to-day needs and identifying opportunities to remedy any deficiencies in provision;
- Involving the local community and retailers.

2.12 Proposed changes to PPS6 were published in July 2008 for a six week consultation. At the time of completing these Health Checks, the proposed changes have not been published. The main changes are:

- The introduction of the impact assessment for developers to undertake when applying for additional retail floor space, as an addition to the 'needs' assessment;
- The preference to determine planning applications on market conditions and competition;
- Allocating types and scale of retail appropriate to the role of the centre; and
- Site allocations for retail development should reflect the level of identified growth.

Planning for Town Centres: Guidance on Design and Implementation Tools (ODPM, 2005)

2.13 This Guidance note accompanies PPS 6 and sets out what are considered to be some of the main tools to secure good design for new developments within town centres and to ensure the implementation of town centre planning policies. Suggested good practice tools include:

- Ensuring new development is designed so that it fronts the street;
- Maximise the active street frontage and reduce 'blank frontage';
- Ensure level entrances;
- Improvement of the quality, convenience and safety of access on foot, by bicycle and public transport;
- Master plans or development briefs for key sites or areas which are suitable for town centre uses;
- Assessment of the role of the town centre and the need and scope for change, renewal and diversification.

Planning Policy Guidance 13: Transport

2.14 PPG 13 states that an individual's quality of life depends upon easy access to jobs, shopping leisure facilities and services. As a result, a safe, efficient and integrated transport system is needed to support a strong and prosperous economy. However, PPG 13 also advises that the continued growth in road traffic is damaging our towns, harming our countryside and contributing to global warming. As a result, PPG 13 encourages for new development to reduce the demand for individual car borne journeys.

2.15 With regards to town centres, PPG 13 advises that a key planning objective is to ensure that jobs, shopping, leisure facilities and services are accessible by public transport walking and cycling. It is stated that this is important for all but especially important for those who do not have regular use of a car and to promote social inclusion. It goes on to advise that at the local level preference should be given to town centre sites, followed by edge of centre and only then out of centre sites in locations which are, or will be, well served by public transport should be considered.

East of England Plan - Regional Spatial Strategy 2008

2.16 The revision to the East of England plan sets out the strategic planning policy advice for the whole region. There is a small section of policy relevant to town centres and retail requirements in the draft plan. It is stated that there is no requirement within the region for any new out of town shopping centres and that Local Planning Authorities should define the towns, market towns and villages that comprise the structure of the main retail areas within their boundaries. The plan states that the retail sector is an important driver of the regional economy and that thriving, vibrant and attractive town centres are fundamental to the sustainable development of the region and they will continue to be the focus for investment, environmental enhancement and regeneration. Identified centres in the district should be protected and enhanced through the appropriate allocation of strategies and measures. The Plan sets out (Policy SS6) that within the context of a community strategy approach, LPAs through their Local Development Documents will:

- Provide a definition of the role of each centre, and then give a strategy to manage change and promote a healthy mix of uses to build upon the positive elements of the individual characters.
- Ensure land is allocation to meet the full range of identified needs for the centre.
- Protect and enhance existing neighbouring centres and where a need is established promote new provision of an appropriate scale and function to meet local day to day needs;

2.17 Policy E5 of the RSS on Regional Structure of Town Centres states that major new retail development and complementary town centre uses should only be located in regional and major town centres in the East of England. There are a number of regional and major centres in Hertfordshire in close proximity to Hertsmere, such as St Albans and Watford, but none identified in the RSS in Hertsmere itself. The supporting text around this policy describes districts such as Hertsmere as strongly influenced by London and larger centres with over-lapping catchments.

2.18 Out-of-town shopping centres are identified in paragraph 4.22. In particular Colney Fields in St Albans District borders the north of Hertsmere. The RSS advises that no more additional out-of-town shopping development is required in the East of England.

Hertfordshire Structure Plan Review 1991-2011

2.19 Since September 2007 the Hertfordshire Structure plan is no longer in effect and the few saved policies do not cover town centres. Policy 4 was the applicable policy area covering shopping facilities, accessibility, security and safety, mixed-use development, cultural, leisure and social facilities and quality environment, but this has been deleted.

Hertsmere Local Plan 2003

2.20 The Hertsmere Local Plan sets out the current policy framework to guide development in the area. With regards to development in town centres the policies reflect the advice advocated by the previous PPG 6, which is very similar to the policy advice outlined under the revised PPS 6 above. There is a range of policies applicable to development and changes of use within the defined town, local town and district centres within the Borough. In summary, these policies aim to:

- Protect the amount of A1 (retail) floor space within the town centres with a 2 out of 6 A1 units policy;
- Promote initiatives to regenerate and encourage investment within the town centres;
- Impose restrictions on the amount of floor space that can locate outside of the town, local town or district centres as defined in the Local Plan;
- Ensure the protection of the local environment within town centres from noise, smells and emissions from new uses;
- Ensure the regulation of other non-retail uses within the town centres; and
- Ensure that any new development is to an acceptable standard in terms of design and floorspace.

Core Strategy Preferred Options 2007

2.21 The Core Strategy preferred options for Hertsmere Borough was published in November 2007; it states that the town centres as set out in the settlement hierarchy are Borehamwood and Darkes Lane, Potters Bar. This is where any significant comparison or convenience retail development would be directed, although a need would have to be demonstrated in accordance with the location and characteristics of the centre.

2.22 Chapter 8 on Town Centres and Shopping identifies that existing centres should have measures in place to maintain and enhance retail facilities. This would include retaining existing A1 retail units and limiting the number of eating and drinking establishments in each centre.

2.23 In order to strengthen town centres Policy CS25 seeks to reinforce these principles through a quantifiable measure. This proposes primary and secondary frontages in each centre, where primary frontages have a focus on A1 retail uses. Secondary frontages will have a wider range of other uses and activities.

3 Overview of national trends in the retail and leisure sector

3.1 Various studies into shopping trends indicate the nature of domestic retailing is likely to considerably alter during the course of the Local Development Framework through to 2021. As such, this section highlights the key national trends in the retail (and leisure) sectors that will be of most importance in driving retail and leisure expenditure growth and in planning for the future of Borehamwood and other town centres in Hertsmere. This information would assist us in providing a general understanding of the quantitative need for further development in the retail and commercial leisure sectors.

In relation to the retail sector this section focuses on:

- Past expenditure change and future projections
- Change in floor space efficiency (turnover per unit sales-area)
- The retail polarisation trend (the concentration of retail expenditure in larger centres)
- E-tailing and online shopping
- The impact of planning policy on location of retail development

In the leisure sector the focus is on:

- Social and economic change as drivers of growth
- Growth in leisure spending and changing leisure activities
- The Gambling Act 2005
- The initial impact of recent planning policy

Retail sector

Past expenditure growth

3.2 Since the early 1980s, the UK retailing industry has undergone a radical transformation. Fuelled by a growing volume of consumer spending, a substantial economic boom occurred. Over the ten year period from 1995 to 2005 there has been an increase in retail expenditure, which may be due to the easy availability of credit, a booming house market and increasing consumer confidence, which translated into consumer expenditure.

MapInfo Information Brief 05/02

3.3 In September 2005, MapInfo published Information Brief 05/02 that deals with goods expenditure trends and projections. There is an average annual increase in comparison[1] expenditure of 4.8% per capita, per annum between 1978 to 2004 and 5.5% per capita, per annum between 1988 and 2004, which gives an average of 5.15% per capita, per annum between the long-term and medium-term trend. As far as the convenience[2] sector is concerned, MapInfo advocates that the most statistically robust estimate for growth is for the period 1993-2004 when the annual growth rate averaged 0.8%.

Business Strategies from Experian (EBS) – Past trends, projections and forecasts

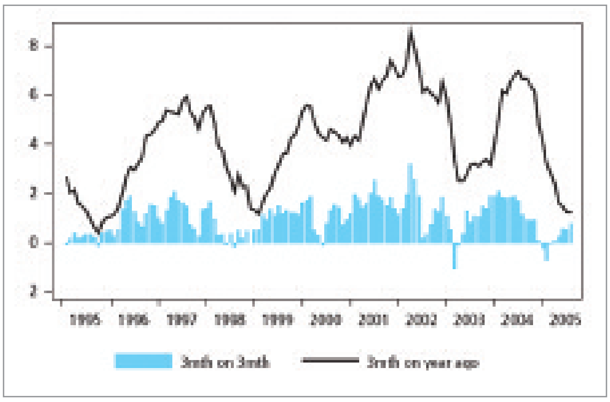
3.4 Although the overall volume of non-food comparison retail sales has slowed to just 0.2% from August 2004 to August 2005 (ONS Economic Trends October 2005, Table 5.8), the short-term growth in comparison goods expenditure from 1998 to 2004 has averaged 8.5% per capita, per annum. Therefore, notwithstanding the cyclical variation in comparison goods expenditure growth, it can be assumed with confidence that growth in the period up to 2018 is likely to be in line with the 40 year trend, at

[1] "Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods." (PPS6, 2005, p.32)

[2] Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionary." (PPS6, 2005, p.32)

approximately 4% per capita, per annum. Indeed, forecasts for Experian (Retail Planner Briefing Note 2.0, Experian, August 2004) and MapInfo (MapInfo Information Briefing 05/02, September 2005) suggest comparison goods growth rates in the period up to 2016 of 3.7% and 4.3% respectively. However, it should be noted that those forecasts do not take account of the current economic downturn, which is recognised to have the potential to result in a lengthy period of recession.

Figure 3.1 - Retail sales growth for UK



Source: ONS Economic Update Number 623 October 2005[3]

3.5 The Retail Planner Briefing Note 2.0 was published by Experience in August 2004. In this document, the past expenditure trends projection for the period 2003 to 2013 ranges from 4.3% per annum for ultra long-term trends to 5.9% per annum for medium term trends. In the convenience sector, the past trends projection ranges from 0.7% per annum using the ultra long term trend, to 1.1% per annum using the medium term trend.

3.6 The alternative forecasts provided by EBS for the period to 2013, indicate a comparison growth rate of 3.7% per capita, per annum and a convenience goods growth rate of 0.9% per capita, per annum.

Colliers CRE – Retail Report 2007

3.7 The most recent retail report undertaken by Colliers CRE in June 2008 has identified that although the economy as a whole has seen growth based on broad expansion, and the prediction for the 2007 to 2008 is expected to slow, but continue to be 'marginally above the long-term average' at about 2.5%. The report has also highlighted that as a long-term average; real disposable income growth for households is slowing, in correlation with economic growth.

3.8 Between 2006 and 2007, Colliers CRE found that Prime Rents in Outer London and the East regional have experienced an increase in growth, and Inner London has seen a decrease in Prime Rents for retail units, this evens out for London in general, which represents static rates (Colliers CRE, May 2007, Growth on average in town prime rents by region).

Expenditure growth conclusions

3.9 Given the number of projections derived from a different of sources, it could be concluded that retail expenditure for both comparison and convenience has a healthy growth rate on a national scale, and relates to a long time period. This trend is comparable to the rate that real disposable income increases. Other trends indicate that rents in the Hertsmere area can vary, but overall stay at constant, particularly on the recent short term. These conclusions must be considered in light of the current economic downturn.

[3] Available at: http://www.statistics.gov.uk/downloads/theme_economy/ET623.pdf

Floor space efficiency

3.10 To maintain their vitality and viability in the face of competition, retailers need to increase their turnover. Floor space efficiency is the term used to describe the increases in turnover per unit of sales area in order for the sales area to maintain its competitive edge.

3.11 Until Experian published its Briefing Note 2.2 in April 2005, the only other efficiency growth measure in use was recommended by URPI's in 1987 (Brief 86/6). Experian's recent research has demonstrated that the growth in comparison goods floor space efficiency has increased substantially since the mid 1980s as a result of the retailing of small volume, higher value goods, particularly in the electrical and information technology sectors. Experian suggests for the comparison sector that an assumption that sales densities are likely to increase at somewhere in the range of 2.0% (the moderate assumption) to 2.5% (the historical trend) appears appropriate. Meaning that some of the projected national increases in expenditure could be accommodated within existing floorspace capacity.

3.12 In the convenience sector, Experian maintains that we would expect a slowdown in the observed 1.1% per annum increase in convenience sales densities between 1986 and 1999. Thus a growth in the region of 0.50% to 0.75% may be assumed to be more suitable over the LDF period. The predicted growth in retail floor space generally, is supported by the Local Government News (LGN) in its article 'Time for retail therapy' (May 2007 pp 26), which states 'shopping centres are set to expand by over five million square metres over the next 10 years'.

Retail polarisation

3.13 Data sources from bodies such as Experian and the Valuation Office confirm that larger town centres, in general, are becoming stronger (lower yields), at the expense of the smaller and weaker town centres. Cambridge Econometrics estimates that 51% of comparison goods expenditure in the UK flows to the largest 100 centres, and much of the in-centre development pipeline is concentrated in these same centres, a trend that is likely to continue to grow.

3.14 This polarisation trend has been driven in the main by the opening of larger stores (or the expansion or diversification of existing larger stores) that serve wider catchments, thereby replacing a number of smaller stores. This is in response to the desire to achieve economies of scale. However, consumer demand has also driven polarisation, in that people are increasingly more mobile and willing to travel further to obtain the comparison goods.

3.15 In the convenience sector, a different form of polarisation has occurred, whereby the large superstore operators have gained an ever-increasing market share at the expense of independent convenience traders and small supermarket operators. As such, the number of independent convenience traders has fallen by 30,000 since 1994, equating to 40% of the nation's stock of shops. Moreover, the large food superstore operators have increasingly diversified their product lines to include an ever-increasing range of comparison goods.

Growth in e-shopping

3.16 Internet sales have risen rapidly in recent years to become an integral part of the British retail market and predictions are it will continue to grow. In November 2002, monthly Internet sales exceeded the £1 billion mark for the first time, and in 2004 the e-tail industry generated £14.5 billion of revenue in the UK alone. Between April 2000 and April 2005, the Interactive Media in Retail Group (IMRG) index recorded £42 billion of online Shopping. This represented an increase in e-tail sales of 1500% over this period.

3.17 As the e-tail market is a relatively new occurrence, its likely future market share is difficult to estimate. The press has however estimated that e-tail will eventually account for approximately 30% of the total comparison goods share. Even if this estimate is found to be too high, what is certain is that Special Forms of Trading will rise over the Local Development Framework period, of which e-tail will be the most significant.

3.18 Not all growth in Internet sales impacts on spend available to the high street. The sub-sectors most likely to be affected are music and films, books and high volume electrical goods, whilst clothing and footwear represents the fastest growing online shopping sector. However, fresh produce, including bakery, diary, meat, fish and poultry under-perform against the national average in respect of the UK online shopping.

3.19 However, rather than losing business to the Internet, many of the top sites are online versions of traditional stores and catalogue retailers, stores major supermarkets that have seize on the opportunity to expand. These include Kays, Empire Stores and La ReDoute. Net Ratings Net View shows John Lewis, Next, Boots and Woolworths holding high positions in the online league. Tesco is reportedly ranked as the largest online retailer in Europe, while Waitrose has overtaken Sainsbury's as the second largest online grocer.

Discount food retailing

3.20 The UK has seen considerable expansion by the discount food retail sector over the last ten to twelve year period. It is likely that deep discount retailers such as Aldi, Netto and Lidl will further expand over the LDF period. For in the latter part of 2004, Aldi announced, as part of its £500 million expansion drive, it intended to open 200 additional stores in the subsequent seven-year period.

3.21 Discount food retailers currently account only approximately 5% of the grocery market share. The preferred method of expansion by such operators is provision of a number of identical small stores serving fairly small population catchment areas, as opposed to large format stores serving a wide area and seeking to meet all consumer needs under a single roof. Hertsmere has one discount food store, Lidl, within the Borehamwood Shopping Centre. However, Government guidance on retailing as set out in PPS6 make no specific reference to indicate that food discounters should be treated any differently to other retailers in terms of floor space requirement.

Impact of planning policy

3.22 In the publication of PPG6 in 1996 and Circular 15/93 on Shopping Development, the Government committed its support for town centre first policy. In the publication of PPS6 in 2005, the Government further reaffirmed its position in support of town centre first development and urges local authorities to take a more proactive stance to land assembly. In its White Paper, published May 2007, the Government has again committed to protect and strengthen the town centre first policy, alongside recommending the abolition of the 'need test', which has been carried through into draft PPS6 revisions.

3.23 However, several commentators suggest that it is only during the past few years that the application of the sequential approach to town centre development began to have an impact. Whilst planning applications for out-of-centre and edge of centre development may have been turned down, a significant number of extant consents were still to be implemented, as such schemes has a long gestation period (e.g. the new shopping centre at White City).

3.24 Colliers CRE predicted that for 2006, the number of new retail parks opening would have been similar to both 2004 and 2005 but that amount of new floor space will fall dramatically to 180,000 sq m, only two-thirds of that developed in 2004. This trend has provided a stock of opportunities as parties relocate to more suitable, modern premises, whereas a substantial increase in floor space has not been identified for the retail sector, other than that of the consistent 2-3% growth seen in the last 10 years.

3.25 CB Richard Ellis's data indicate that town centre schemes now account for 78% of the shopping centre pipeline compared to 64% in 1993. However, in a Financial Times article of August 2005, Donaldsons claimed that more than half of new retail floor space was still being built in out-of-town locations. In New Start (1 June 2007 Vol. 9 389) Nigel Keen in his article 'Testing Times for Urban Regeneration' states nearly two-thirds of new retail development still takes place in out-of-town locations.

Leisure Trends

3.26 This section covers commercial leisure trends, and not the hotel or hospitality sectors. The growth in leisure expenditure is predicted as having a significant impact over the period of the Local Development Framework. The key social and economic changes that have benefited the leisure industry include:

- The increase in the number of people employed, particularly women, who account for 82% of part-time jobs
- An increase in the number of affluent households with a higher proportion of disposable income to spend on leisure
- A growth in the amount of leisure time young people spend surfing the Internet, downloading music and watching DVDs
- Continued changes/increases in household disposable income and consumption.

Table 3.2 - Trends in household disposable income and consumption (UK)

	1998 £Bn	2004 £Bn	2011 £Bn	Growth 1998-2004	Growth 2004-2011
Household Disposable Income	612.11	754.8	900.83	23.3%	19.3%
Household Final Consumption	587.54	719.27	851.70	22.4%	18.4%

Source: Experian, Autumn 2004 (2001 prices)

3.27 Forecasts by Experian indicate that overall expenditure on leisure services will increase by 1.4% per capita, per annum, over the period 2005 to 2014, although these do not take account of the current economic downturn. Table 3.2 below sets out existing leisure spend, broken down by Experian into six Classification of Individual Consumption by Purpose (COICOPS) categories for the UK as a whole.

Table 3.3: Spending on leisure services in 2004

COICOPS Categories	Description	UK spend per capita (£m)	% Of leisure spend
11.1.1	Restaurants, cafes, bars, pubs etc.	£1,000	61%
9.4.2	Cultural services	£238	14%
9.4.3	Games of chances	£151	9%
11.2	Accommodation services	£92	6%
9.4.1	Recreation and sporting services	£83	5%
12.1.1	Personal - hairdressing, tanning etc	£78	5%
TOTAL		**£1642**	**100%**

Source: Experian Retail Planner Briefing Note 3.0, Table 2 (2004 prices)

3.28 The data in Table 3.2 above indicate that restaurants, cafes and bars account for three-fifths of the UK spend on leisure. However, commercially oriented leisure developments such as cinemas accounts for only 5.1% of spend, with bingo halls accounting for a mere 6% of spend on games of chance and casinos accounting for just 14% spend on games of chance. Further national projections of categories of leisure spend, published by the Leisure Industries Research Centre (LIRC), and are set out in Table 3.3 below.

Table 3.4: Spend on selected leisure activities 2000-2008* (UK)

	2000 £m	2001 £m	2002 £m	2003 £m	2004 £m	2005 £m	2006 £m	2007 £m	2008 £m	%Change 2008/2000
Bingo	523	552	595	602	606	664	637	641	676	29.25
Cinema	623	620	724	678	739	769	803	840	879	41.10
Discos/Dancing	749	752	790	832	885	941	999	1,060	1,127	50.50
Spectator sports	767	808	826	909	998	1,121	1,217	1,337	1,485	93.61
Eating out	33,011	34,376	36,782	38,916	41,160	43,700	46,226	48,939	51,865	57.10
Alcoholic drink[I]	18,080	18,790	19,990	20,430	21,370	22,300	23,330	24,400	25,500	41.10
Total sightseeing	934	943	1,046	1,077	1,137	1,194	1,256	1,321	1,390	48.80
Total Gaming	7,082	7,152	7,583	8,129	8,389	8,890	8,630	8,905	9,376	32.40
Health & Fitness[II]	1,420	1,583	1,641	1,763	1,814	2,033	2,077	2,190	2,381	67.70

Source: Leisure Industries Research Centre (current prices)

* Exclusive of spend of non-UK citizens, relating to Gross Ticket Revenues only, excluding VAT and concessionary income.

[1] This includes alcohol consumes in restaurants and hotels, but adjusted for alcohol consumed at home.

[11] Private sector estimates. Local Authority income excluded.

3.29 Notwithstanding that the above data is not segmented into regions, leisure spend would vary according to region, social class and age profile, it may also relate to the increased costs associated with some activities like spectator sports. Both Experian and LIRC data show ‘eating out’ as the highest expenditure category, followed by ‘alcoholic drink’, ‘gaming’ and ‘health and fitness’. However, based on existing market shares, the fastest growth is projected to be in ‘spectator sports’ and ‘health and fitness’ sectors.

Gambling Act 2005

3.30 The Gambling Act, which was passed in April 2005, reformed the gaming legislation to take account of current leisure trends. A major change was to bring all aspects of the gambling industry under the auspices of one body, namely the Gambling Commission, which came into being in October 2005. All aspects of licensing have been transferred from magistrates to local authorities. The Act also scrapped the 24-hour membership rule and permits advertising by casinos. There are no demand tests for casinos, licensed betting offices and bingo clubs. The Act however has no provision for technological advances, which have come into being since its enactment, such as online betting and gambling.

3.31 Under the Act, three types of casinos are designated. These are ‘regional’, ‘large’ and ‘small. Regional casinos are to be allowed up to 1,200 machines including some with unlimited jackpot prices. The large and small casinos would be restricted to jackpot machines with a maximum price of £4,000 although the table to machine ratios would be much greater than for existing casino operators. Regional and large casinos would be able to offer bingo whereas all categories will be permitted to offer betting.

3.32 The Government believes that the presence of regional casinos would facilitate regeneration of deprived areas. In addition to bringing all aspects of gambling under one roof, facilities such as hotels accommodation, conference facilities, restaurants, bars, areas for live entertainment and other leisure attractions will follow.

3.33 The Regional Advisory Panel were charged with making recommendations as to the locations of one ‘regional’, and eight ‘large’ and small’ casinos by the end of 2006. Parliament was to approve the locations during the first quarter of 2007 but the House of Lords have since rejected the government’s proposals.

Impact of planning policy

3.34 Government guidance and policy has striven to direct leisure developments to town centre and edge-of - centre locations. The challenge is for local authorities to design town centres which operate through days and evenings, rather than becoming deserted after 6pm when offices and shopping facilities close. This makes shopping areas appear threatening by desertion or the presence of a large number of drinkers.

3.35 One effect of the Licensing Act (2003) has been to extend drinking hours, a phenomenon more likely to occur in town centres than in rural areas. This Act means that drinking establishments are generally open longer than before, but reduced the social effect of all establishments closing at the same time. There is little evidence to say that these changes have significantly decreased anti social behaviour[4]. The main findings from an evaluation of the changes to the Act found that that licensing hours are but one factor in determining the cause of anti social behaviour.

3.36 The policy change is encouraging more mixed-use developments with a combination of leisure, retail and, in some cases, office space. Nighttime leisure facilities ensure that the parking facilities are utilised to the maximum extent.

3.37 Nonetheless, several commentators have indicated that most leisure park development to date has been in out-of centre locations. In the 1990s, the concept of the out-of-town leisure park, anchored by a multiplex cinema and bringing together a range of leisure and restaurant uses rapidly evolved. Reminiscent of the retail sector, large sites of four hectares or more have typically been sought with a catchment of about 250,000 people in a 20-minute drive time. However, according to Colliers CRE, new Government policy in relation to the sequential approach to site location is beginning to have an impact on the leisure sector.

Conclusions on retail and leisure trends and forecasts

3.38 Key national trends indicate that retail expenditure growth in the period up to 2016/2018 is likely to be in line with a 40-year trend, at around 4% per capita, per annum, depending on the long term national economic situation. Comparison goods expenditure growth, together with anticipated population growth, will generate comparison goods retail floor space requirements. Regionally, growth will be directed to large centres outside Hertsmere in line with the East of England Plan 2008.

3.39 This growth in demand for new comparison goods retail floor space will occur despite a projected growth in Internet sales from a present day level of around 6% of total expenditure on comparison goods in 2006/2007, to about 16% by 2018, and the increase in convenience retailing, which may not take account of the current national economic situation.

3.40 The leisure sector has benefited from the continued growth in household disposable income and final consumption, and expenditure on leisure services is forecasted to grow by 1.4% per capita, per annum in the period 2006-2018. Current market trends data would indicate that much of this growth in expenditure would continue to be in restaurant, cafes and bars, which currently accounts for three fifths of total spend on leisure.

[4] Hough, M., Hunter, G., Jacobson, J. and Cossalter, S. (2008) The impact of the Licensing Act 2003 on levels of crime and disorder: an evaluation, Home Office, Available (http://www.homeoffice.gov.uk/rds/pdfs08/horr04c.pdf)

4 Review of centres' vitality and viability

4.1 This section will go into detail on the health of each centre individually, to assess its vitality and viability, and define the role that each centre has in the local borough context and in relation to the surrounding centre. A range of sources will be used to provide this evaluation, including footfall counts taken in October 2007, the most recent retail survey of June 2008 and some past trends, a shopper survey completed in and the Retailer and Business Survey in April 2007.

4.2 The Retailer and Business Survey was undertaken in April 2007 in order to provide an insight into occupiers' perceptions of the six main town centres in Hertsmere. The survey sought to canvas views on:

1. Satisfaction with retail premises
2. Key issues facing town centres retailers
3. Factors affecting business turnover
4. Quality of retail and leisure facilities
5. Key competitors
6. Ways to improve the centre

4.3 The questions were agreed with officers and a questionnaire distributed to each retailer and other businesses located within the six town centres – namely, Borehamwood, Radlett, Bushey Heath, Bushey High Street, Potters Bar Darkes Lane and Potters Bar High Street. The questionnaires were hand delivered to each retailer/business with a pre-paid addressed return envelope.

4.4 A total of 606 questionnaires were handed out to retailers and other businesses. In addition a further 23 commercial premises were seen to be vacant. The overall response and return rate was 25.4% (154 responses). A response rate of 20% is generally perceived as an average for such surveys. The responses received can be broken down per town centre as follows:

Table 4.1 - Breakdown of respondents to Retailer and Business Survey

Town Centre	No of questionnaires handed out	No of responses received
	Base 606 (100%)	*Base 154 (100%)*
Borehamwood	172 (100%)	44 (28.6%)
Bushey High Street	58 (100%)	19 (12.3%)
Bushey Heath High Road	48 (100%)	10 (6.5%)
Potters Bar Darkes Lane	115 (100%)	35 (22.7%)
Potters Bar High Street	117 (100%)	24 (15.6%)
Radlett	111 (100%)	22 (14.3%)

4.5 This average figure conceals a lower than average response rates in the centres of Bushey High Street, with 19 responses (12.3 %) and Bushey Heath with 10 responses (6.5%). In the absence of any known external factor, the reasoning for the low response rate must be attributed to retailer and business apathy in the main – a reason mentioned by some retailers.

4.6 However, the responses to the questionnaire received for Bushey High Street and Bushey Heath are considered sufficient to give an insight into the views and opinions of retailers/businesses within these town centres. The responses from the businesses/retailers for each town centre are now considered in turn of its hierarchy.

Borehamwood town centre

Introduction

4.7 Borehamwood grew from a hamlet after the construction of the Midland Railway in 1868 and manufacturing industry over the following years moved into the town. After 1914 the film and later the television industry also grew providing the economic base of the town. In the post second world war years the population and housing numbers of the town were dramatically increased with the re-housing of people from London.

4.8 Today Borehamwood is the largest town in the Borough. It has a population of 31,172 (Census 2001) and has the largest concentration of shopping facilities. In the 'hierarchy of shopping centres' set out in the Hertsmere Local Plan 2003, the central shopping area of Borehamwood is classed as a 'town centre', and is the highest order centre in the Borough. The shops are concentrated along Shenley Road with the Borehamwood Shopping Park, which has a vehicular access off Theobald Street and pedestrian links to Shenley Road, forming part of the key shopping area.

4.9 In recent years there has been investment into the shopping park and as a result the large bulky good occupiers have tended to vacate the shopping park and more national multiple retailers have occupied floor space and now there is an M&S Food, NEXT, WH Smith, Argos, Costa Coffee and Halfords located within the park. There has been the demolition of the former petrol station and link building with Shenley Road and new retail units and a new doctor's surgery have been constructed, increasing the appeal of the shopping park as a destination in its own right.

4.10 As a result of increased investment into the shopping park, there has been a modest level of investment into Shenley Road, especially in the areas close to the shopping park with the introduction of the low end clothing retailers Bon Marche and Peacocks, and more recently national food outlets like Starbucks and Nandos. There is the possibility that the key shopping area within the town centre has shifted towards the centre of Shenley Road and more specifically the shopping park area. There is a large Tesco Extra superstore, which has been extended at one end of Shenley Road, and a twice-weekly market also occurs on Shenley Road.

Shopping breakdown and vacancy levels

Table 4.2 - Breakdown of shop units for Borehamwood Shenley Road

Convenience		Comparison		National Chain		Local Chain		Local Only		Vacant	
No.	%	No.	%	No.	%.	No.	%	No.	%	No.	%
14	8.3%	75	44.4%	70	41.4%	41	24.3%	39	23.1%	17	10.1%
A1		**A2**		**A3**		**A4**		**A5**		**Other**	
(m)	%	(m)	%	(m)	%	(m)	%	(m)	%	(m)	%
749	54.4%	184	13.4%	110	8.0%	53	3.9%	73	5.3%	69	5.0%

Retail Survey June 2008[5]

4.11 Table 1 above shows a break down of the units located within Borehamwood Town Centre. The data used was collected by the June 2008 Retail Survey. At that time, 89.9% of units (168 units) were occupied representing a reasonably stable trend in occupancy since July 2005 until 2007. However, vacancy rates are

[5] For all centres summarised by the Retail Survey, figures for metres (m) of frontage for use classes rounded to the nearest whole number, and figures for percentages are rounded to one decimal place.

now higher compared to the January 2005 survey when Borehamwood had one of its best occupancy levels of 94.1%. The number of comparison and convenience A1 units in the town centre is now at 54.4%, which given the number of vacant units is in line with Policy T6 of the Local Plan.

4.12 Of the 17 units that were recorded empty in Borehamwood Town Centre in June 2008, 14 were also vacant at the time of the January 2006. Two units at 10-12 Theobald Street have been recorded vacant at every survey conducted since October 2001. There have been 13 vacant units consistently recorded as vacant for two consecutive surveys or more, although there is not undue concern with this number of vacant units. It is anticipated that at some stage in the future there will be further investment with new buildings at this location.

4.13 Almost half of the units in Shenley Road are for comparison A1 use, with 14 additional units being for convenience use. 41% of all units in Borehamwood are considered a national chain, of which 81% of these are comparison retail (35 out of 43 units). This indicates that this town centre serves a local population for day to day convenience shopping items and a wider population for higher order goods, which supports the role that Borehamwood plays in Hertsmere as a Major Town Centre.

4.14 This analysis does not take into account unit sizes, whilst 44.4% of the units are for comparison use, many of these units especially the shops located in the shopping park, are very large and substantially larger than many of the smaller shops along the High Street. Therefore, the large NEXT or Argos shop in the Shopping Park in their right may be an anchor shop for the town drawing in shoppers from a larger catchment area.

4.15 The number of multiple retailer representations is generally a good indication of the health of a centre. Using the data collected in the July 2006 retail survey, 51 units (27%) in the centre are classified as being a national multiple retailer, the number of national chains has now increased to 41.4%. 80 (47.4%) of units are considered to be occupied by independent, specialist or local traders at the time of the survey in June 2008. The twice-weekly market is not included in these calculations. FOCUS comments that in June 2007 only 25% of the top 20 UK retailers are present within Borehamwood, also that in October 2006 Borehamwood was ranked as the 194th largest centre in the UK in terms of retailing floor space but its ranking slipped to 260 in April 2007.

Rents

4.16 Colliers CRE indicate that during 1999 to 2003 period prime retail rent levels for Borehamwood Town Centre remained static at £377 per square metre per annum. Table 3 shows rents standing at £484 per square metre per annum in June 2006, even though this has not been a steady year on year increase. It has not been possible to obtain any formal data on higher and lower level of rents.

4.17 However, it can be generalised that given the level of refurbishment that has occurred in the Shopping Park and the locating of national multiple stores in this area the rent levels in the Shopping Park will generally be significantly higher than for units on Shenley Road.

Table 4.3 - Prime shop rents in Borehamwood town centre

Date	Retail Rent
2008	£484/ sq. m
2006	£484/ sq. m
2005	£484/ sq. m
2004	£431/ sq. m
2003	£377/ sq. m

Source: Colliers CRE – UK Prime In Town Retail rents 2006 and 2008

4.18 The level of yield broadly represents the market's evaluation of risk and returns attached to the income stream of shop rents. A lower yield figure indicates that a town centre is more attractive and there is stronger investor confidence. As a result the town is more likely to attract investment than a town with a high yield. The Valuation Office places prime yields for retail units in Borehamwood Town Centre at 8% in October 1994 and twice yearly for every subsequent year to January 2007. In Schroders quarterly fact sheet in March 2007, it stated that in the relocation of various units to the Boulevard rent per square metre increased from £172 to 215 for a 1,394 sq. meter unit

4.19 In January 2007, the yield figure of 8% for Borehamwood Town Centre compares unfavourably with competing centres such as Watford 5.5%; Brent Cross 4.25%, St Albans 5.75% and Welwyn Garden City 7%. In comparison yield figures for Blue Water are 5%, Lakeside 4.75% and London West End 4.5%. However, the Valuation Agency warns that factors affecting yield are complex and need to be interpreted with reference to the circumstances in each individual town. Furthermore, it cautions that yield may not be consistent over the town centre as a whole.

Accessibility

4.20 Borehamwood has good public transport accessibility. There is the Elstree and Borehamwood railway station on the Thameslink Line with direct links to, for example, Radlett, St Albans, Mill Hill Broadway and Kings Cross St Pancras. The bus inter-change is located in the station forecourt at the western end of Shenley Road. There is a second smaller bus inter-change located at the eastern end of Shenley Road in front of the Tesco superstore and there are several bus stops along Shenley Road itself. In addition, there is cycle parking provision and there are large car parks at the Shopping Park, above Holmes Place, Tesco, by the Council offices and a smaller car park on Clarendon Road. In the Parking Standards 2008, Shenley Road is classed as Accessibility Zone 1 for non-residential parking standards.

Footfall counts

4.21 For Borehamwood it was decided that counts should occur in nine locations given the length of the town centre and to be able to identify if certain sections are busier than others. The three locations chosen are one at the eastern end of Shenley Road on the corner with Whitehouse Avenue, one in the centre of the town in Keystone Passage by the new Starbucks, then a Marks and Spencer and one at the eastern end on the corner with Glenhaven Avenue (the results are presented in Appendix G).

4.22 As can be seen from the above tables, the busiest part of the town centre at all times of day is the Keystone Passage, which is the main pedestrian link from the shopping park to Shenley Road. This is not a surprising result as the shopping park offers a large car park in the central part of the town and the main concentration of national multiple stores are located in the Shopping Park. The count at Whitehouse Avenue at the eastern end of the town is substantially higher than the count at Glenhaven Avenue at the western end of the town, despite this being the end of the town nearest to the station and bus interchange. However, this can be explained by possible linked trips from the Tesco superstore to Shenley Road, which is located at the eastern end of the town, or more likely the number of officers that are located at the eastern end of Shenley Road and along Elstree Way, and the trips made to the town centre by office workers in their lunch break.

4.23 It can be concluded that the footfall along the eastern end of the town and in the central section is good. If the footfall at Keystone Passage is considered to represent the maximum level of footfall (100%), the eastern end of the town receives 70% of the volume of footfall the central section of the town centre receives. Therefore, the footfall past the shops located at this end of the town centre is still a high amount. However, at the western part of the town centre only receives 36% of the footfall that occurs in Keystone Passage area. Therefore, consideration needs to be given to initiatives to boost the footfall in this part of the town centre, whether this end of the town should be considered as the secondary shopping area, and other complementary uses that could be encouraged to locate in this part of the town centre to encourage more shoppers to visit the western end of the town centre.

Crime

4.24 In Borehamwood Brook Meadow and Hillside wards from April 2005 to March 2006 over 1,100 crimes were recorded, each ward having an equal proportion, although Hillside is larger in area. Between 2000 and 2006, the whole of Shenley Road and the Boulevard retail park recorded 1,178 crimes, which varied from year to year and peaked in 2002 and again in 2004, but has decreased since then. The most commonly recorded crimes in the two Borehamwood wards that cover Shenley Road are 'criminal damage including arson' and 'theft from a motor vehicle'. This is unsurprising given that a significant proportion of these have occurred in the Boulevard, with one of the largest car parks is located in Borehamwood. About 22% of criminal damage incidents in Hertsmere have occurred in Borehamwood.

Town centre environment

4.25 The main high street is wide with good pedestrian access along and across the road, although the pedestrian environment at the eastern end near Tesco is not particularly good. Shenley Road benefits from wide pavements in most sections of the street, with several bus stops and parking areas. The buildings are of a disjointed nature, and where the highest footfall counts were seen the frontage is unbroken, this may be due to a lack of a focal or meeting point for the town centre.

4.26 Shenley Road has a variety of aged buildings, starting mainly from the 1950s according to Hertsmere's List of Locally Important Buildings (2008). Parades on Shenley Road, including 8-14, 20-38, 29-45 and various individual buildings are on the list, which are subject to heritage protection. There are areas of Shenley Road with vegetation, trees and benches, which contribute to a more agreeable place to be.

4.27 The Boulevard retail park attracts national chain stores and has a more uniform appearance compared to the main street; the feel is more open with car parking facilities. In the summer of 2008 Shenley Road received investment, where the road surface was resurfaced removing uneven block paving and the street furniture was repainted, improving the general appearance of the town centre.

4.28 Borehamwood town centre is considered to be moderately well performing. The recent investment into the retail park has increased footfall in the central location of the town centre on the north side indicating that the centre of the town centre is now focused around the Shopping Park and central section of Shenley Road. The western end of Shenley Road is performing less well, with lower numbers of shoppers, increased numbers of vacant properties and higher thresholds of non-A1 units. Consideration should be given to initiatives to boost the shoppers to this end of the town. The eastern end of the centre towards Tesco has fewer vacant units than the other end, but lower footfall counts than near to the retail park.

Retailer and Business Survey results for Borehamwood

4.29 Based on the analysis of data in Appendix A (Table 1 to 9), the dominant business trend appears to be small, independent businesses of long standing, mainly serving the local resident population. Some 44 responses were received from 172 distributed questionnaires, giving a response rate of 28.6%. Of these, 48% were from retailers (see Table 1), with 68% being independent businesses (Table 2). The respondents considered themselves greatly reliant for trade on local residents, with 84% indicating this as their only source of business (Table 3). Table 4 shows that 75% of the respondents in Borehamwood are leaseholders.

4.30 Of the 44 respondents 75% are leaseholders followed by 16% owner occupiers. 43% of the respondents occupy premises under 93 square metres (approximately 1000 square feet), whilst 18% occupy premises in excess of 140 square metres (approximately 1,507 square feet). However, a significant 23% did not respond to this question. Over 40% of respondents occupied their current premises in Borehamwood for over 11 years (Table 7), though only 16% are owners or freeholders (Table 3). Almost half the respondents indicated sales for 2005/2006 at under £200,000, with just over 25% estimating the same sales figure for 2007, though a significant number did not respond to this question. Also, 27% did not state the monthly rent for their premises in Table 8, with the most common reported rent paid per month is between £1,001 and £2,000.

Premises

4.31 72% of respondents expressed various levels of satisfaction with their current premises (Table 9). Those that were dissatisfied identified poor condition, lack of suitable parking facilities and lack of suitable servicing as key issues (Table 10). Over 25% of respondents plan to undertake internal refurbishment works, whereas a much smaller percentage have plans for external works. (Table 11).

Relocation and business closure

4.32 The relocation intentions of the businesses surveyed within Borehamwood Town Centre can be compared with the health check of the centre, which will be discussed later in this study. One-third (33%) were considering relocating due to high rent and /or rates (Table 12). For those that were considering relocating, the majority intended to relocate away from Hertsmere. (Table 13). A further 9 businesses (20%) were considering closure. Of those considering closure a key reason cited again was, high rents and rates, followed by low profit margins and competition from larger stores such as Tesco (Tables 14).

Turnover

4.33 The survey shows that for 34% of retailer/business turnover has remained the same over the past three years. However, for 39% the turnover has been decreasing (Table 15), and 16% have indicated that their turnover has been increasing over the same period.

4.34 Respondents were asked to identify the main factors occurring over the past year that had affected their business turnover. The key issue was related to increased competition, with 3 respondents specifically citing Tesco (Table 16).

4.35 Looking at business performance within Borehamwood town centre over the next five years, 29% of respondents indicated they expected their performance to stay the same. Some 23% expected to expand their business, whilst only 2% expected a decrease in profit (Table 17).

Main challenges faced by businesses

4.36 The data provided in Table 18 below indicate the main challenges faced by businesses are insufficient passing trade, followed by low pedestrian flow and poor quality environment, which carry equal weight. Crime and vandalism is another key challenge. Other significant issues raised are lack of parking and competition from Tesco (multiple answers were accepted for this question). The data also shows that competition from other town centres within the borough, and centres outside the borough such as Watford are challenges.

Rating of Borehamwood facilities

4.37 The survey results set out in Table 19 below indicate that, in general, respondents consider the facilities at Borehamwood town centre to be average. The quality and range of shops and the range of leisure and recreation facilities were considered to be average. The provision of restaurants, cafes and takeaways was considered to be good. However, car parking provision, cleanliness and tidiness of the town centre and provisions for the evening economy were all rated as poor.

Town centre performance

4.38 In terms of economic performance, over 50% of respondents considered Borehamwood town centre to be performing at an average level at present. More respondents (29%) believed performance was poor or very poor, compared to those that thought performance was either fairly good or excellent (4%). About half of respondents rate economic performance in Borehamwood at 'average' (Table 20).

Evening economy

4.39 Respondents were asked to rate their satisfaction with evening facilities/activities in Borehamwood town centre represented in Table 21. Of those who responded to this question, the majority indicated that they were either satisfied or fairly satisfied with restaurant, takeaways and pub facilities. Other issues raised were the lack of evening facilities for children' a general lack of night trade and the need for a health club or spa, despite the location of the Venue and The Point.

Shopper Survey Results for Borehamwood

4.40 The majority (30%) of the shoppers surveyed live in Borehamwood. Borehamwood town centre is one of the centres most likely to be visited everyday by shoppers, but more respondents visit the town centre 2-3 times a week. Table H3 shows that most people who responded that live in Borehamwood also visit the town centre on a regular basis, only a few of the respondents go elsewhere. Some respondents visit Borehamwood regularly from other towns in Hertsmere, particularly from small villages that only have retail for day to day convenience requirements. This means that there is a large proportion of people that use the car or walk to get to the centre, of the people that drive most people that responded said that parking was not a problem, although 27% said there was a problem with parking in the centre. Borehamwood is also the only town where people cycle to get there, but more people get the bus than cycle. For most people that come to Borehamwood it takes 5-10 minutes to get there, this mean most of the shoppers come from the local area, however there was at least 10% that come from a wider area.

4.41 The most popular types of shops that the respondents go to Borehamwood for are food stores, banks, the post office, and the market and leisure services. Borehamwood is one of the centres with a wider range of facilities compared to smaller centre. This is reflected in the Table showing how much people tend to spend in Borehamwood, where more people spend more on food than on other types of retail, and it is likely that most people will not spend more than £100-150 in other retail shops. Respondents who shop in Borehamwood spend more money than in other centres in Hertsmere, which emphasises the importance of comparison retailing in this centre. In Table H9, the most dominant issues experienced by shoppers were the traffic and congestion in the centre, the amount of litter and gum on the street, and the lack of car parking. Other issues like the number of national multiples and fear of crime did.

4.42 None of the respondents from Borehamwood said they visit another retail centre outside Hertsmere on an everyday basis; the most people that go to other centres 2-3 times a week go to central London. Other popular retail centres that respondents go to out of Hertsmere include Watford and London Colney, particularly for clothes and shoes (Table H12).

Conclusion

4.43 Borehamwood town centre is in a highly accessible location, not only in relation to London, but also on a local level. The town centre has high footfall counts for Hertsmere, and the number of national multiples in the centre has increased in recent years. Although there are a large number of vacant units, there is potential to redevelop them to achieve a higher quality centre. The higher proportion of comparison than convenience units is evidence to warrant the 'major town centre' designation in the Local Plan and draws some shoppers from further afield compared to other centres in the borough. Borehamwood town centre is large enough to find shop rent data, and although rents have remained constant in the last few years, prime rents went through significant increases in rent between 2003 and 2005. Issues with the town centre that have been identified by retailers and shoppers include the provisions for the evening economy and the state of the centre environment.

Potters Bar town and district centres

Introduction

4.44 The town of Potters Bar can be traced back to medieval times. Originally the town developed along the Great North Road (High Street) in the Eighteenth century and was later developed further when in 1850 the London – Cambridge railway connected the town of Potters Bar on the western side of the High Street and the second centre for the town on Darkes Lane developed around the station. A large phase of house building occurred in the 1950s and following the construction of the M25 in the 1980s the town's commercial and industrial centres also developed.

4.45 Today the town has a population of 22,008 (Census 2001) and has a large commercial centre focused around the High Street and Mutton Lane and two main industrial estates (Station Close and Cranborne Road). The town also act a dormitory settlement for commuters to London. The two centres in the town have difference designations. Hertsmere Local Plan (2003) classes Darkes Lanes as a 'local town centre', the role of this is to: "Serve much of the town as main centre, chiefly for convenience goods (but also provides other types); smaller presence of national multiples; some car borne shopping catered for, accessed by foot, bus (or possibly train) and private car". The High Street is classed as a District Centre in Hertsmere Local Plan, which sets out its role as: "Local day to day needs (mainly convenience shopping) plus some specialist shops which may attract non local shoppers; accessed mainly by foot, bus and private car".

Potters Bar Darkes Lane town centre

Shopping breakdown and vacancy levels for Darkes Lane

4.46 This analysis only takes into account shop units that fall within the town centre boundary, as defined in the Hertsmere Local Plan 2003.

Table 4.4 - Breakdown of shop units for Potters Bar Darkes Lane

Convenience		Comparison		National Chain		Local Chain		Local Only		Vacant	
No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
14	12.8%	59	54.1%	29	26.6%	3	2.8%	69	63.3%	8	7.3%
A1		**A2**		**A3**		**A4**		**A5**		**Other**	
(m)	%	(m)	%	(m)	%	(m)	%	(m)	%	(m)	%
609	67.0%	93	10.3%	59	6.6%	24	2.7%	36	2.9%	27	2.9%

Retail Survey June 2008

4.47 There has been little overall change to the use of the units, with a single A3 restaurant becoming an A5 takeaway since January 2006. There has been no change in the number of retail units (67.6%, 75 units) remaining at the level seen in the January 2006 survey. There has been an average of 66.8% A1 retail units in Darkes Lane over the entire survey period. This use class still accounts for just over two-thirds of all units in the Darkes Lane Town Centre, the highest proportion of any of the large shopping areas in the Borough. A3, A4 and A5 (food and drink outlets) uses account for almost 12% of units (13 units) while non-retailers occupy a further 15.3% (17 units). This has remained level since the July 2004 survey.

4.48 The July 2006 survey saw no change in the number of vacant units accounting for 5.4% (6 units) of the local town centre. Five units have been vacant for at last two surveys, but in February 2008 vacant units have increased to 8. Despite this, Darkes Lane continues to experience high occupancy rates, with 94.6% of units (105 units) in use.

4.49 There were few changes in the turnover of businesses in Darkes Lane since the July 2005 survey. One A1 unit became vacant with one vacant unit being brought back into use as an A1 retail unit. Four units have seen a change in ownership over the last six months, but the business has remained the same. This is a greater turnover (5.4%) than the previous survey period, which saw 2.7% of units change hands or business or fall vacant.

4.50 It is anticipated that the town centre environmental and streetscape enhancements emerging from the Potters Bar Town Centre Action Plan will help to sustain and enhance the area's status as an attractive destination for both shoppers and retailers, helping to encourage greater retail occupancy in the town centre.

4.51 The number of shops in convenience and comparison retailing is high, with these two types of shops accounting for nearly half the units in the town, 48%. This is the highest level of shops in convenience and comparison use out of any of the centres in the Borough. The level of food and drinking establishments are still well represented, accounting for 12% of the shops in the town and there is good representation in the non-food and other category providing for other uses such as estate agent, vets and so on. The level of vacant units is about average with the other centres in the Borough. The centre is considered to be performing well meeting the day-to-day and slightly wider shopping needs of the local population.

4.52 The number of national stores is well represented in this centre. There are 29 shops (26%) that are classified as being a national multiple chain shop, including takeaways and letting shops. This is the second higher number of national multiples in a centre in the borough after Borehamwood, and is only 1% less than the percentage of national multiples that are located there. There are 82 shops (74%) that are occupied by independent, specialist or local traders.

Rents

4.53 It has not been possible to obtain any data on areas of higher or lower rents in Potters Bar. However, generally it can be concluded that rents in Darkes Lanes will most probably be higher than rents in the High Street.

Accessibility

4.54 The shopping area of Darkes Lane is considered to be easily accessible. There is the railway station and car parks at the station, behind the offices in Wyllyotts Place, at Manor Road and the car park for Sainsbury's. The station forecourt will have significant improvements undertaken in the autumn of 2008, to improve the aesthetics of the area and the accessibility to bus users and private hire car customers. The local population can also easily access the centre on foot and bike.

Footfall counts

5.55 There were 8 footfall counts undertaken along Darkes Lane. The highest footfall counts were found in the middle of Darkes Lane, where the highest concentration of shops are, and also by the railway station on the west side. This is reasonable given the position of the railway station and where buses stop, and the central location of the supermarket. There was still a high footfall along The Broadway, despite being split off from the main section of the town centre; it had a higher footfall than the extreme northern end. This may be due to the nature of retail units located along these two parades, in that some of the units on The Broadway are specialist, and the northern end of the centre has just three larger format retail units.

Crime

5.56 Potters Bar Parkfield ward covers the whole area of Darkes Lane town centre; over a six-year period from 2000 to 2006 there were 58 crimes in Darkes Lane, The Broadway (4) and the Sainsbury's Centre (8). The April 2005 to March 2006 data for Parkfield the two most common crimes committed were criminal damage, including arson and theft from a motor vehicle. There were more robberies in Parkfield than Oakmere, which covers High Street, and neither centres recorded 'violence against the person', although there were more 'thefts from the person' in Parkfield over the six years.

Town centre environment

4.57 Potters Bar Darkes Lane is the larger of the two centres in Potters Bar, and also the buildings have a more cohesive feel in terns of scale and layout. With similar age and design of buildings in Borehamwood and Radlett, Darkes Lane also has a wide street layout and a spacious feel. From the Broadway to the northern end of the street, there are flowerbeds, more so than other centres, which add a pleasant feel to the town centre environment. Expenditure from the Potters Bar town centres fund has helped to improve the environment, in particular it has had an impact on street furniture and the station forecourt improvements.

Retailer and Business Survey for Darkes Lane

4.58 Some 35 responses were received from 115 questionnaires handed out, giving a response rate of 22.7%. Of these, 51% were from retailers (Table 22), with 77% being independent businesses (Table 23). 77% consider themselves heavily dependent for trade on the local resident community with 11 % of trade coming from Hertsmere boundaries and beyond (Table 24), showing that links to settlements to the north of Hertsmere are important (see Appendix B for Tables)

4.59 A majority (80%) of respondents were leaseholders (Table 25), for smaller premises that are most commonly between 47 and 140 sq. meters. There was a large variation in estimated sales, although there seems to be a correlation between 2005/6 and 2007/8 (Table 27), where most occupants have been in their current premises for 11 or more years (Table 28). The average rent paid by retailers and businesses are similar to that of Borehamwood Town Centre, with about £1,001-£2,000 per month (Table 29).

Premises

4.60 Almost half of retailers and businesses in Darkes Lane centre say they are 'fairly satisfied' with the premises they are in at the moment, with a greater proportion of people being more satisfied with the premises than not. The main reason for this is that there is a lack of parking (Table 31). Other most popular reasons for the modest level of satisfaction were the lack of suitable servicing or the level of competition.

Relocation and business closures

4.61 Table 32 states that only 31% of respondents plan to refurbish the premises internally or externally, and 53% of respondents have plans to relocate to other locations because the rent are too high in their current premises (Table 33 and 35). There were a wide mixture of responses to the relocation areas (Table 34), the most popular answers were Welwyn Garden City in Hertfordshire, London or closer to London, or to relocate within Darkes lane, Luton, Hatfield, Ware and the High Street were other choices.

Turnover

4.62 Table 36 represents the respondent's turnover for the past three years; it shows an even distribution as to increasing and decreasing turnovers, with just over a quarter of respondents maintaining no change in turnover.

4.63 The main factors that affect businesses turnover according to table 37 is the increase in competition for that business or retail unit; otherwise its rent increases that affect turnover. Looking to the future, two thirds of retailers and businesses in Darkes Lane expect their business performance to either stay the same or expand. There is also quite a high proportion that are looking to sell their premises.

Main challenges facing businesses

4.64 A significant number of people in Darkes Lane stated that low pedestrian flow outside their premises was one of the main challenges for retailers and businesses in the town centre, followed by insufficient passing trade, and crime and vandalism. Competition from centres outside of Hertsmere is seen as a challenge from three respondents.

Rating of Potter Bar Darkes Lane facilities

4.65 Table 40 has summarised the respondent's view of Darkes Lane. The majority of respondents feel that the quality and range of shops are average to poor, with no one saying that the range of shops was 'good'. The majority of respondents feel that the town centre is accessible by both public transport and by car, and it is easy for pedestrians to move around, although the car parking provision for the centre is 'poor'. The majority sees the level of traffic and congestion in Darkes lane as 'average'.

4.66 Respondents have stated that they feel the quality of retail units with A3 and A5 use class and the quality and range of recreational /leisure facilities are of 'average' to 'good' quality. The main street is viewed as having 'average' cleanliness and tidiness, but with 'poor' evening activities or facilities.

Town centre performance

4.67 In terms of the town centre performance as a whole, almost half would rate it as 'poor', and 13 out of 35 respondents rating Darkes Lane performance as 'average' (Table 41), despite the negative rating in Table 40 for things to do in the evening.

Evening economy

4.68 Table 42 states that the majority of respondents were 'satisfied' with restaurants, takeaways, pubs and bars in Darkes Lane, however there were significant numbers of respondents who were 'very unsatisfied' with these evening facilities.

Shopper Survey Results

4.69 One quarter of the respondents come from Potters Bar, of these most shoppers go to Potters Bar centres, particularly Darkes Lane and a few visit South Mimms. About half of the people get to the centre by walking, a few less get to the centre by car, and 13% of respondents get to Darkes Lane by bus. For 82% of respondents, it takes less than 10 minutes to get to the centre, and it took more than 15 minutes for only 3 respondents. In Table H6, similar proportions of respondents said parking was or was not a problem compared to Borehamwood, with more people saying that parking was not a problem in the centre.

4.70 The most popular reasons for respondents going to Darkes Lane are for food shopping, the bank and the post office, and for leisure goods and services. Table H10 shows a similar trend to Borehamwood, where most respondents spend less than £100 on most items in the town centre. The most significant problem identified by respondents in Potters Bar is the lack of national multiple shops. Other centres that respondents from Potters Bar visit correlate with the towns that are closest to Potters Bar, including St Albans, Welwyn and London Colney. Fewer people visit places like Brent Cross and Watford compared to respondents from Borehamwood, maybe this is due to proximity and the ease of which respondents can travel there. Table H12 shows that respondents travel out of the borough primarily for clothes, shoes and household goods, on which respondents tend to spend up to £100-£150. Many of the respondents travel to London Colney to do their food shopping.

Potters Bar High Street district centre

Shopping breakdown and vacancy levels for High Street

4.71 This analysis only takes into account shop units that fall within Potters Bar High Street district centre boundary, as defined in the Hertsmere Local Plan 2003.

Table 4.5 - Breakdown of shop units for Potters Bar High Street

Convenience		Comparison		National Chain		Local Chain		Local Only		Vacant	
No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
9	9.2%	49	50.0%	8	8.2%	0	0%	88	89.8%	2	2.0%
A1		**A2**		**A3**		**A4**		**A5**		**Other**	
(m)	%	(m)	%	(m)	%	(m)	%	(m)	%	(m)	%
368	48.7%	69	9.2%	129	17.0%	37	4.8%	21	2.7%	83	11.0%

Retail Survey June 2008

4.72 Potters Bar High Street continues to enjoy a high occupancy rate (95.9%) with just 2.0% of units vacant at the time of the June 2008 survey. The number of units in each broad use category has remained relatively stable since the survey started in October 2001. 55% of units (54 units) remain in A1 retail use with a total of 40.8% (40 units) used for non-retail and A3, A4 and A5 purposes. The high number of cafés and restaurants in the area is reflected in the relatively high proportion of units in A3, A4 and A5 uses, with 187 metres of frontage, representing nearly of quarter of the centres frontage. Potters Bar district centre also has the highest proportion of takeaway (A5) units of all the district centres. However, the stable pattern of use suggests that this still represents a sustainable mix for this area.

4.73 One more unit has been vacated since the last survey. Three vacant units have been brought back into use, two of which are A1 retail units since the last Retail Survey.

4.74 This analysis also includes shops units at the northern end of High Street, opposite the bus depot, that are categorised as being 'edge of centre' as these shops also contribute to the shopping offer of the town. Therefore, this analysis has considered 125 units rather than the 99 units analysed in Table 5.4 above.

4.75 The percentage of shops in the High Street in convenience and comparison use is 43%, and this is only slightly lower than the percentage of shops in this use in Darkes Lane. However, the key difference between the two towns is the number of shops in food and drink uses. In the High Street 28 shops or 22% of the units are in this use. Whereas in Darkes Lane only 13 shops or 12% of the units are in food and drink uses. Therefore, the High Street offers a lower number of retail shops to attract daytime shoppers to it. However, a higher concentration of food and drink uses is not necessarily harmful, as good quality restaurants can boost the evening economy in the area. There is a good representation of non-food and other uses accounting for 29% of the units in the town, although the quality of eating establishments is subjective, units in High Street are of a lesser quality than those found elsewhere in the borough.

4.76 There is extremely low representation from national multiple retailers in the High Street according to the retailer and business survey 2006. Three shops (2.4%) are occupied by a national multiple, which are Alldays, Land of Leather and Kwik Fit, so the majority of shops (97.6%) are occupied by specialist, local or independent traders. This is not only a sharp contrast to Darkes Lane where 26% of the shops are occupied by national multiple chains, but is the lowest representation of national multiples in any of the towns in the Borough.

Rents

4.77 It has not been possible to collate any data on areas of higher and lower rents. However, it can be concluded that rental values in the High Street will be lower than those in Darkes Lane.

Accessibility

4.78 The High Street is less accessible than Darkes Lane as the station is not within walking distance. However, the bus depot is located at one end of the town but it is likely that the main modes of transport to the town will be private car and on foot or bicycle.

Footfall counts

4.79 Due to the extensive length of this centre, 9 footfall counts were taken after seeing the High Street on the ground and presented on a map. It was found that the highest footfall counts were taken along High Street towards the junction with Southgate Road and Mutton Lane, particularly on the west side of the road, which may be due to the increased concentration of retail units compared to other areas. Generally the west side of High Street experienced the higher counts, which may be due to more retail units in a more uniform manner compared to the opposite side of the road.

Crime

4.80 The ward that fronts the east of Potters Bar High Street is Oakmere. According to the Office for National Statistics it has the second highest number of offences in Potters Bar. The most common offence recorded was criminal damage, including arson between April 2005 and March 2006. Over a six year period (2000-2006), 15 crimes committed in Oakmere were on the High Street, where as of the 410 crimes committed in Parkfield on the west side of High Street in the year 2005-6, 62 occurred in High Street over a six year period. The ward of Oakmere experienced more crime involving ‘wounding or other acts endangering life’, than in Parkfield.

Town centre environment

4.81 This centre is the secondary centre in Potters Bar and provides residents with a day-to-day convenience shopping need and supports the evening economy for Potters Bar with the majority of restaurants being located here. A variety of period buildings and little connectivity in the parades add to a broken up and spread out parades. The overall length of the designated district centre of High Street is almost twice the length of Darkes Lane, and with other parades further up the north of High Street, is more than twice the length.

Retailer and Business Survey for High Street

4.82 Potters Bar High Street is a district centre, parallel with Darkes Lane. Half of the respondents to the survey were retailers (Table 43), of which 83% were of an independent or individual nature (Table 44), as opposed to being part of a chain. It was estimated, like Darkes Lane, that the majority of the customers using the shops or businesses were local residents, or from beyond Hertsmere (Table 45). However more people from beyond Hertsmere use the High Street rather than Darkes Lane, possibly due to the location of specialist shops and restaurants that would capture a wider customer base.

4.83 Table 47 shows that the units in High Street are primarily under leaseholder agreements, rather than freeholder or short term rental. This applies to a variety of sized units, with a wider range than that of Darkes Lane, due to the amount of space available. The majority of units are between 47 sq. meters and units over 140 sq. meters (Table 47).

4.84 Almost half of respondents preferred not to state their estimated sales. However those that did respond 38% of businesses made estimated sales of over £200,000 in 2005/6, whereas 42% made the same amount for 2007/8. It appears that those that responded made an over all increase in estimated sales between 2005/6 and 2007/8 in Table 48.

Premises

4.85 Table 49 shows that the majority of occupiers in High Street have been in their current premises for more than 11 years, and 25% of respondents have been in their current premises for between 1 and 5 years. Table 51 states that 83% of respondents are 'fairly satisfied', 'satisfied' or 'very satisfied' with their current premises, and only one responses did not state whether or not they were satisfied with the premises. Five respondents stated that a lack of parking was the most common reason for not being satisfied with the location and three respondents felt that the premises being in poor condition was another reason for not being satisfied with the premises. Table 53 shows that two thirds of respondents have no plans to refurbish the premises, and 21% of respondents that were planning on refurbishing would look at internal improvements rather than external, which is similar to the Darkes Lane response.

4.86 Table 50 shows the monthly rent for units in High Street, it seems the average rent is substantially lower than that of Darkes Lane and Borehamwood, where 25% did not respond to this question. 13 % of respondents pay £601 to £800 and 13% pay £1,001 to £2,000 per month. However due to the larger size of some of the units and the wider variety of use classes in this road 29% pay more than £9,000 per month.

Relocation and business closures

4.87 Several businesses from the survey indicated that they would consider relocation; the primary reason was due to the rents or business rates being too high (which is reflected in Table 56), or the save on other costs. Radlett and Hatfield were the only other centres that would be considered for relocation of the few responses received for this question in Table 55.

Turnover

4.88 All the respondents from High Street answered the question for turnover for the past three years, almost half of respondents stated that there was no change in the turnover, however 42% stated that the turnover for the past three years had been decreasing. The main factors (Table 58) for this were that there was increased competition (46%) and costs had increased (28%).

4.89 Table 59 shows that 67% of respondents expect their business performance will continue to stay as it is, and 21% hope that there business will be expanding over the next five years.

Main challenges facing businesses

4.90 The majority of responses stated that the low pedestrian flow outside the premises and other insufficient passing trade were the most significant factors in Table 60, even though 71% of respondents would rate the access by car, public transport and foot as 'good' to 'average'. 71% of respondents thought that traffic in the centre was 'average'. The quality and range of shops in Table 61 was rated as 'average', and the range of restaurants and cafes as 'good'. A couple of businesses feel that the competition from Tesco and other supermarkets in the area were having negative affects on competition in the centre.

4.91 Just over half of respondents in table 61 would rate the perception of crime as 'average', and almost 80% would rate the cleanliness and tidiness of the centre as average, and 62.5% rate the street furniture as 'average'.

4.92 In terms of the facilities in this centre in Potters Bar, 92% of people that returned the survey felt that things to do in the evening were 'poor' to 'average'. The majority of businesses thought that the range of Leisure facilities in the centre were average, but the quality of those facilities were 'average' to 'good'.

Town centre performance

4.93 In terms of how respondents view the performance of the centre, although 5 respondents didn't reply to this question, 12 thought that the High Street had 'average' economic performance on a scale of five (Table 62). It has been noted that the current parking situation was required for this centre to maintain a certain level of passing trade for businesses.

Evening economy

4.94 Table 63 shows that a minority of respondents were 'very unsatisfied' with restaurant, takeaway and pub evening facilities in High Street. The majority of respondents were 'very satisfied' to 'satisfied' particularly with the restaurants.

Shopper Survey Results

4.95 Twenty per cent of respondents who live in Potters Bar, shop in High Street in Potters Bar, of these respondents stated that they visited the district centre either once a week or once every two weeks. Exactly the same number of respondents get to High Street by car or by foot, which takes on average 5-15 minutes to get to the centre, which is longer than people take to get to Darkes Lane and no one responded to say that parking was a problem here, although Table H9 states that respondents identify the lack of car parking as an issue, the only other issue identified in this centre is the amount of litter.

4.96 The most popular reasons for going to the centre are for food shopping, and visiting the doctors, dentists and the library. Respondents who shop in High Street do not spend more than £100 on clothes, shoes, household items or leisure service in High Street, they are more likely to spend £100-£150 on food in the centre instead. Also, respondents for Potters bar High Street do not tend to shop in other locations more than 1 or 2 times a month, however London Colney is popular for food shopping and more than half of respondents go to surrounding towns like Hatfield, St Albans and Welwyn to do other types of shopping, particularly clothes and shoes (Table H13).

Conclusion for Potters Bar Darkes Lane and High Street

4.97 Potters Bar is characterised and, to some degree, undermined by having two centres. It can be concluded that Potters Bar High Street and Potters Bar Darkes Lane perform very different roles for the town of Potters Bar. Darkes Lane is significantly busier with more shops offering a wider range of goods and meets both the day-to-day shopping needs and some comparison retail shopping for the local population. The High Street has a higher proportion of units that may attract more of an evening economy, including drinking establishments and restaurants, compared to Darkes Lane. It may be concluded that the High Street should maintain a more flexible approach to retail and focus on the local community convenience requirements given the levels of footfall counts recorded in each centre and better accessibility to Darkes Lane.

Radlett district centre

Introduction

4.98 Radlett is located towards the northern end of the Borough and is located on the old Roman Road Watling Street. As with Borehamwood, it was when the railway was constructed in 1868, the current Thameslink line, that the village started to expand. Development pre-1914 was piecemeal and sporadic and the main building phases of the town occurred during the inter-war period and in the 1950s and 1960s when the Newberries and Battlers Green estates were constructed.

4.99 Today the town has a population of 8,034 (Census 2001) and is typically characterised with mature residential development of large family homes in large plots. There is little industry in the town, with it mainly being a dormitory settlement. The town centre in the existing Hertsmere Local Plan 2003 is classed as being a District Centre. Its role is described as being: "Local day to day needs (mainly convenience shopping) plus some specialist shops which may attract non local shoppers, accessed mainly by foot, bus and private car".

Shopping breakdown and vacancy levels

4.100 This analysis only takes into account shop units that fall within the town centre boundary, as defined in the Hertsmere Local Plan 2003.

Table 4.6 - Breakdown of shop units for Radlett

Convenience		Comparison		National Chain		Local Chain		Local Only		Vacant	
No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
13	13.3%	40	40.8%	21	21.4%	4	4.1%	71	72.5%	2	2.04%
A1		**A2**		**A3**		**A4**		**A5**		**Other**	
(m)	%	(m)	%	(m)	%	(m)	%	(m)	%	(m)	%
322m	41.0%	136m	17.4%	118	15.0%	52m	6.6%	27m	3.4%	97m	12.3%

Retail Survey June 2008

4.101 Table 6 above shows a break down of the units located within the Radlett district centre. The data used was collected by the June 2008 retail survey. In the January 2006 survey it was picked up that two units had separated into smaller units. At 97.96%, the occupancy rate remains the similar to January 2006, with very little change in vacancy levels. The number and proportion of units recorded in non-retail use has increased to 45%, compared to 30% in 2006/7. This relatively high proportion of non-retail units is in part due to almost one in ten units being 'other' town centre uses such as in B1 (business) or SG (own class) in comparison to the other district centres surveyed, and one mixed-use A1/A3 units. The majority of the units in Radlett are of a local nature, with just over a fifth of units being national or multiple chains.

4.102 This analysis takes into account all the shops along Watling Street. This includes three units at the northern end of Watling Street that are classed in the Local Plan as being 'edge of centre'. However, it is considered that for completeness purposes all the units forming part of the centre for the shopper, whether these are in the defined 'centre' or 'edge of centre' boundaries, should be considered. Shop units on the edge of the centre may be a specialist shop that may attract shoppers to the centre. Therefore, this analysis has considered 103 units rather than the 100 units analysed in table 5.3 above.

4.103 When convenience and comparison units are combined this accounts for 38% of the use of the units in the centre. The largest proportion of units, 43%, is in the non-food or other category. The Radlett District Centre extends along Watling Street. The main shopping area of the town is the Newberries Parade, which is located in the southern half of the centre. The shops along the northern half of the centre are more sporadic with a greater mix of other uses. However, as stated above, there is a diverse range of shopping facilities on offer in the town and despite having both a low level of convenience and comparison shops, there is a vibrant shopping area meeting the needs of the local area.

4.104 In line with the retail survey in February 2008, of the 22 responses that were received in the Retailer and Business Survey 2006 the majority of respondents were from locally owned businesses, The general view of retailers and businesses in the town centre is that Radlett is a successful district centre with just a few respondents rating Radlett Watling Street as anything less than 'average'.

Rents

4.105 It has not been possible to obtain formal data on this issue. However, it can be generalised that rents are likely to be highest along the Newberries Parade as the public car park is to the rear of this parade, and it is in this part of the Centre that there are most retail shops and the highest number of national multiple shops such as Boots, Budgens, Clinton Cards and Tesco Express.

Accessibility

4.106 Accessibility to the Centre is considered to be fairly good. There is a large public car park, Newberries Car Park, located to the rear of the Newberries Parade. In addition, there is a parking lay-by running the length of the centre, which allows for time- limited parking in front of the shops. The Radlett railway station on the Thameslink line is located fairly centrally within the town centre with links from Kings Cross Station through to Borehamwood and Elstree and St. Albans stations. The centre is also accessed by bus with several bus stops located throughout the town. Nonetheless, the main mode of transport to the centre is likely to be by private car or from local residents who can either walk or cycle to the centre.

Footfall counts

4.107 A total of 7 footfall counts were undertaken in Watling Street, generally there was high footfall count throughout the centre, but the highest counts were taken outside the post office on both sides of the road. As counts were taken towards the northern end of the road counts became lower, but with little difference. There was a higher count outside the northern most parade opposite the synagogue, compared to the west side of Watling Street opposite the railway station.

Crime

4.108 Over a six year period of 2000 to 2006, Hertfordshire Constabulary recorded 497 crimes in 'Watling Street', however the distribution of these cannot be determined for specific locations such as those that just occurred in the district centre. The Office for National Statistics have not got statistics available for either of the Aldenham wards that cross over Watling Street district centre.

Town centre environment

4.109 The majority of the parades in Watling Street are built in the early 20th century, which adds to a regular appearance to the sections of the main street with the highest footfall counts. Similarly to Borehamwood's Shenley Road, Watling Street is a generally a wide road, with good pedestrian access along wide pavements and parking off the main road. The centre of Watling Street outside the railway station is the narrowest section of the street, which is where the slightly older parades are found, however the pavements are still quite wide. There are also trees and appropriate street furniture, and the Conservation Area, which contribute to a pleasant shopping centre environment.

Retailer and Business Survey for Radlett Watling Street

4.110 22 responses were received from retailers and businesses from Watling Street in Radlett, where 59% were retailers and 36% were from professional or financial services. Of the 22 responses, 86% are independent companies or individuals, and 2 of the responses are part of a national chain. Similar to the other centres, the majority of respondents are leaseholders to their premises, and 18% are the owners or freeholders of the premises. There is a wide range of size of premises that respondents occupy, 41% state they occupy units up to 46 sq. meters, however there are still several respondents that occupy units of over 140 sq. meters. Four businesses out of the 22 did not reply to this question (Table 110).

4.111 Table 108 estimates that 77% of trade comes from local residents, and a further 9% are those that work in the centre. 13% of trade comes from outside of Hertsmere, including a high proportion of national trade compared to other centres in Hertsmere. Table 111 shows that 37% estimate sales to be between £20,001 and £80,000 in 2005/2006. Between 2005/2006 and 2007/2008 there is not a significant amount of difference in estimated sales, the only characteristic that could be noted, is that estimated sales appear to be up for the majority of respondents.

Premises

4.112 Table 112 shows that all but one business has occupied their premises for more than 1 year, with 41% stating they have occupied the premises for more than 11 years. Table 113 shows that nearly half of respondents pay between £1,001 and £3,000 per month in rent, however there are still 5 respondents that pay less than this per month.

4.113 Table 114 shows that the majority of respondents are satisfied with the premises that they occupy, however there are 5 respondents that are not satisfied with the premises. The main reasons for this is the lack of parking facilities, the lack of suitable servicing and the premises being too small. Other reasons mentioned by respondents were the poor condition of the premises and the rates being too high for small businesses (Table 115). To improve on the condition of premises, 23% of respondents said they are considering internal refurbishment. There were no plans for external refurbishment on Watling Street (Table 116).

Relocation and business closures

4.114 Table 117 shows that 5 respondents are considering relocation, the most common reason for this is that rent and business rates are too high, similar to other centres in Hertsmere. Other reasons stated by respondents were that they need to access more customers, the lack of parking and the size of the premises is too small. Intentions to relocate would take half of these respondents to another location in Radlett. Other locations include east London.

Turnover

4.115 Table 120 shows how respondents turnover has changed over the last 3 years, over two thirds of businesses have had no change or an increase in turnover, however four respondents have experienced decreasing turnover. The main factors respondents say have affected turnover are the increase in rents and increased competition. Table 122 shows that 40% of respondents feel that their business performance will stay the same over the next five years. Seven of the respondents are looking to expand over the next few years or open new shops, but five are looking to sell their property.

Main challenges facing businesses

4.116 Table 123 outlines the main challenges the respondents feel affect the business, similar to all other centres there was a significant majority of businesses that feel low pedestrian flow and insufficient passing trade were important factors. Other challenges include crime and vandalism and a poor quality environment.

Rating of Radlett Watling Street facilities

4.117 In terms of the facilities that Radlett offers, retailers and businesses feel that the quality and range of shops, street furnishings and things to do in the evening are 'average' on a scale of three. Restaurants, cafes and takeaways are rated by the significant majority as 'good', whereas the quality and range of leisure and recreation facilities are rated as 'poor'. 12 out of 21 respondents rate the cleanliness and tidiness of the district centre as 'average', and security measures, such as CCTV, as 'poor' despite the perception of crime being 'average'.

4.118 Accessibility by public transport and by car is all rated as 'average', including parking and congestion. The ease to which pedestrians are able to move round the centre is rated as 'good' to 'average' by all but one respondent (Table 124).

Town centre performance

4.119 Table 125 shows how retailers and businesses would rate Radlett's economic performance. 36% would rate it as 'fairly good' and 42% as 'average'. A minority of respondents rate Radlett as 'poor'.

Evening economy

4.120 The final question in the survey relates to businesses satisfaction with evening activities and facilities. All respondents were satisfied with the restaurants and takeaways in Watling Street, however three respondents indicate dissatisfaction with the pubs and bars available.

Shopper Survey Results

4.121 Radlett achieved the third highest response rate for the Shopper Survey, of which most people use the district centre either everyday or 2-3 times a week, all the respondents who live in Radlett shop in Radlett, also respondents from Shenley are more likely to shop in Radlett than Borehamwood. The majority of respondents who shop in Radlett will get there by car and less than half will walk to get there, most people spend 10-15 minutes to get there and two thirds of people who responded said that parking was a problem in the centre.

4.122 The Survey shows that respondents that go to Radlett, go there for a wider variety of reasons compared to other centres, ranging from food, bank, post office, doctors, dentist and the library, no respondents go to Radlett for high order goods, such as large electrical items. Respondents generally spend up to £150 on food in Radlett in a month (Table H10) similar to other centres, but are more likely to spend more on clothes and leisure services compared to other district centres in the borough.

4.123 A poor bus service and the traffic congestion in the district centre are identified as problems, and the lack of national multiples in the centre is not identified as such a problem compared to other centres (Table H9). Respondents are more likely to go food shopping in London Colney 2-3 times a week compared to other locations, although Watford and St Albans are also alternative popular places to visit, particularly for comparison shopping. Respondents are more likely to spend up to £200 a month on food and clothes, which is more than respondents who shop in other centres in the borough (Table H13).

Conclusion for Radlett District Centre

4.124 With a low vacancy rate and a high level of independent traders, Radlett District Centre is considered to be a vibrant centre serving the day-to-day needs of the local catchment area, with some high quality specialist retailing throughout the centre. There is a good proportion of uses in the centre with a healthy evening economy appreciated by shoppers and retailers, and it is evident that that A3, A4 and A5 retail units do not over dominate the centre. Shoppers and retailers identify low footfall counts and poor recreation and leisure facilities as particular issues facing the centre.

Bushey and Bushey Heath district centres

Introduction

4.125 In the late nineteenth century the town became a focus for the artistic community as it had strong links with the Monro Circle of water colourists and the Victorian artist Sir Hubert Von Herkomer.

4.126 Today the whole town has a population of 17,001 (Census 2001) and the town is characterised as being a dormitory settlement for both Watford and London. There are two designated District Centres in the town. One centre is around Bushey High Street. This is located in the northwestern end of the town and is centred on the old village centre and the feeling of a village is still prevalent today, which is designated as a Conservation Area. The second centre is Bushey Heath located in the Bushey is located in the west of the Borough, lying to the west of the M1 and close to Watford.

4.127 The origins of Bushey can be dated back to medieval times, which grew substantially in the Victorian and post Second World War period. Both centres in Bushey are classed as district centres in the Hertsmere Local Plan 2003 where their role is described as being: "Local day to day needs (mainly convenience shopping) plus some specialist shops which may attract non local shoppers, accessed mainly by foot, bus and private car".

Shopping breakdown and vacancy levels for Bushey High Street

4.128 This analysis only takes into account shop units that fall within the town centre boundary, as defined in the Hertsmere Local Plan 2003.

Table 4.7 - Breakdown of shop units for Bushey High Street

Convenience		Comparison		National Chain		Local Chain		Local Only		Vacant	
No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
8	18.6%	14	32.6%	6	14.0%	1	2.3%	33	76.7%	3	7.0%
A1		**A2**		**A3**		**A4**		**A5**		**Other**	
(m)	%	(m)	%	(m)	%	(m)	%	(m)	%	(m)	%
143	41.7%	68	19.9%	79	23.1%	21	6.1%	10	3.0%	9	2.6%

Retail Survey June 2008

4.129 Table 4.7 above shows a break down of the units located within the Bushey District Centre. The data used was collected by the February 2008 Retail Survey. Bushey High Street has one of the lowest amounts of frontage of A1 in any of the district centres in the Borough. This survey sees the lowest level of A1 retail units since the October 2001 survey, which was 46% in October 2001 and went up to 54% in January 2003. However, the number of vacant units has stayed the same in recent years and not increased.

4.130 At 48.8% (22 units), the proportion of non-retail units is high when compared to the other centres in this category, which has also increased since the Retail Survey in 2006. At 7% (3 units) this survey also sees a decrease in vacancy levels since the 2001 survey, where 5 units were vacant. The number of units has also increased through the splitting and rearrangement of units.

4.131 Nearly one third of units in Bushey High Street can be classed as comparison retailing, which is about the same as other district centres in the borough. The High Street also has a majority of Locally owned or individual shop units, and almost 15% are national multiples.

4.132 When convenience and comparison units are combined, this accounts for 51.2% of the shop units of the town centre. Food and drink uses account for 21% of the shops while other non-retail uses accounts for 4.6%. Since 2001, the number of retail shops was at its lowest level in 2006, however A1, A2 and A3 units have increased in the last couple of years. Bushey is very near to the large regional centre of Watford, which contains a large covered shopping centre (The Harlequin) and a number of 'out of centre' retail parks within easy travelling distance from Bushey. These will have a strong pull for shoppers. Bushey High Street's role is only for local day-to-day shopping and its focus on convenience units.

4.133 Using the data collected in the July 2006 retail survey, 4 shops (8%) are classified as being a national multiple chain shop. 51 shops (92%) are therefore considered to be occupied by independent, specialist or local traders.

Rents

4.134 A survey asking questions on rental values of different shop types was sent out to estate and commercial agents in each of the town centres in May 2006, prior to the current economic downturn. The response rate was extremely low. However, one agent in Bushey did respond and the following results are based solely on this one response.

4.135 The survey concluded that for Bushey town centre the most valuable areas for floor space is both sides of the High Street between Rudolph Road and Park Road. Rent levels in this area are £23 per sq ft for A1 and A2 uses and £28 per sq ft for A3/4/5 uses. The less valuable areas of floor space are the north side of the High Street between Park Road and Bornehall Road and both sides of the High Street between Rudolph Road / Kemp Place westwards towards Falconer Road. Values in this area are £22 per sq ft for A1 and A2 uses and £26 per sq ft for A3/4/5 uses. The agent states that the yield on floor space is on average 5.5-6.5% regardless of the use of the floor space.

4.136 The agent concludes that they generally did not have problems re-letting units in the prime area with the average time of an A1 / A2 unit being vacant before it was re-let, is on average being 1-2 months, and an A3 unit being 0-1 months. The agent said that if there were no planning restrictions on the number of A1 units there had to be in the town centre then there would no problems letting units at all. He concluded that he has never been instructed to find accommodation for national multiple chains and that recently there has been much less or even no demand for new A1 retail uses.

Accessibility

4.137 The main modes of access to this town centre will either be by the local population walking or cycling to the centre or by private car. There is not a train station close to the centre and whilst there are buses that run along the town centre, due to the more limited range of shops on offer, it is unlikely that the centre will attract shoppers from a wide catchment area. Unlike the other towns in the Borough, there are no charges for parking in the town centre, either on-street or in the car parks.

Footfall counts

4.138 Five footfall counts were undertaken in Bushey High Street, which covered all frontage areas. The highest footfall counts were taken outside Kemp Place, Bournehall Road and Park Road on the north side of High Street, these counts were particularly high compared to the south side of the road. On the south side of High Street and west of Kemp Place, only one person was recorded during the ten minute survey.

Crime

4.139 Hertfordshire Constabulary has recorded 388 crimes in Bushey High Street between 2000 and 2006. This has not been broken down so that it can be determined exactly what crimes took place where, but on a comparable level Bushey Heath experienced slightly more crimes than High Street during this period.

Town centre environment

4.140 Bushey High Street is in part of a designated conservation area and a site of archaeological interest, as defined in Hertsmere's Local Plan (2003). This may have had an impact on the way that retail units in this district centre are managed. Some of the buildings are on the Local List of Important Buildings and date from the mid 1700s, with the majority of the high street being developed in the early 1900s. Different building lines break each frontage, due to the age of most of the buildings forming the parades of High Street. This adds an un-even nature to the centre with its unique buildings and characteristics. However, the narrow width of the High Street and, in particular, the footway on the south side of the district centre is not necessarily conducive to a good pedestrian environment.

Retailer and Business Survey for Bushey High Street

4.141 Bushey High Street generated 19 responses, three quarters of respondents were retailers and the rest were from financial and professional A2 services (Table 64). 15 respondents stated that they owned their own business in the High Street (Table 65), and half of respondents own their own property rather than rent, which they use for business purposes. 84% of respondents thought that their business comes from local residents (Table 66). This is unsurprising that this centre plays a local convenience role for the community, given its proximity to Watford and other retail facilities.

Premises

4.142 Characteristic of a district centre and conservation area, Table 68 has shown that most of the units are up to 46 sq. meters to 140 sq. meters in floor space. There is a wide range of estimated sales for retail units in Bushey, ranging from £40,001 to £60,000 to over £200,000, however 37% of respondents did not answer this question. Between 2005/6 and 2006/7 there were slightly more businesses that estimated sales to be over £200,000 (Table 69).

4.143 Table 70 shows that 42% of occupants have spent 1-5 years in their premises, whereas 32% have been there for more than 11 years, which varies compared to centres in Potters Bar. The majority of occupants are 'fairly satisfied' to 'very satisfied' with their premises, and 4 respondents stated that the reason for dissatisfaction was the lack of parking. Other reasons included units that were too small or in poor condition. The majority of people stated that they had no plans to refurbish there premises, but 27% have plans to refurbish either inside or out (Table 75).

Relocation and business closures

4.144 Table 75 and 77 shows that 4 of those businesses that responded have reasons to relocate; half of those were due to high rents or business rates. Other reasons included the need to access more customers, or the need for larger premises, which is reflected in Table 68 showing the size of premises. Three of respondents stated that they would move to other centres in the district. No respondents would relocate to locations out of the district (Table 76).

Turnover

4.145 Over half of respondents thought that their turnover during the past three years had been increasing. The remaining respondents were split between 'decreasing' and 'no change' in turnover. It was felt by businesses that increasing competition, parking and high business rates affect the turnover that businesses can achieve, even though 26% did not respond to the question (Table 80).

Main challenges facing businesses

4.146 The majority of respondents stated that the low pedestrian flow outside the premises was the main challenge facing businesses. Other factors given were crime and vandalism and insufficient passing trade, similar to that of Potters Bar district centre (Table 82).

Rating of Bushey High Street facilities

4.147 Respondents rated the quality of shops as 'average', whereas the range was rated as 'poor' by the majority of businesses. Equally the majority described the restaurants, cafes and takeaways, and leisure facilities in the centre as 'average', but in terms of things to do in the evening, the range was rated as 'poor' to 'average' (Table 82).

4.148 Accessibility for the centre was described as 'average' for the car and by foot, and 'good' for access by public transport, however traffic and congestion is seen as a problem. Crime and perception of crime was rated as 'average' to 'poor' by the majority of respondents and security measures are seen as 'poor'.

Town centre performance

4.149 Despite the relatively positive results for Bushey High Street's estimated sales and turnover, respondents have viewed the economic performance of the centre as 'average' to 'poor'. 11% of respondents did not state their opinion to this question.

Evening economy

4.150 Table 84 shows that the majority of responses are 'fairly satisfied' to 'very satisfied' with the evening activities in High Street. Only 1 response was not 'satisfied' with the restaurants and pubs in the centre, but there were 2 responses out of the 19 that were 'unsatisfied' with the takeaways in Bushey High Street.

Shopper Survey Results

4.151 Eight per cent of respondents live in Bushey village, of which seven respondents said they visit Bushey High Street most regularly and eight prefer to go to Bushey Heath High Road. Respondents use a variety of methods to get to the centre, including bus, by foot and the car. Most people spend 0-10 minutes getting to the centre; the most time spent getting to the High Street is 20 minutes. Table H7 shows that most people use this district centre for food shopping and accessing the bank or post office facilities, it is noticeable that no respondents go there for the lunch trade, emphasising the role of the centre as local convenience with little significance for the centre for business or employment.

4.152 The only issue that may be identified as a problem in Bushey High Street was litter, otherwise the lack of parking and the lack of national multiple shop units were also raised as an issue for the centre. All respondents but one stated that they spend less than £100 on all types of retail in Bushey village. This is unsurprising given the small local scale of shop units. Table H11 shows that most people go out of Hertsmere for their shopping on a regular basis, more so than other centres. A high proportion of respondents go to Watford on a regular basis for clothes and food shopping, and are more likely to spend more money there than in the High Street.

Bushey Heath High Road

Shopping breakdown and vacancy levels for Bushey Heath High Road

4.153 This analysis only takes into account shop units that fall within the town centre boundary, as defined in the Hertsmere Local Plan 2003.

Table 4.8 - Breakdown of shop units for Bushey Heath High Road

Convenience		Comparison		National Chain		Local Chain		Local Only		Vacant	
No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
12	26.7%	11	24.4%	6	13.3%	3	6.7%	33	73.3%	3	6.7%
A1		**A2**		**A3**		**A4**		**A5**		**Other**	
(m)	%	(m)	%	(m)	%	(m)	%	(m)	%	(m)	%
163	49.8%	40	12.3%	46	14.0%	0	0%	0	0%	70	21.5%

Retail Survey June 2008

4.154 Bushey Heath has a relatively high proportion of units in A1 retail use at 49.7% in February 2008. The July 2006 survey indicates a levelling off where there had been a continuing gradual decline in the number of A1 retail units, with the most recent survey seeing the level of A1 retail units at the lowest level since October 2001 where the number of A1 units was recorded at 66.7%.

4.155 Of the 45 units in the District Centre, three units were vacant in 2008 (7%). The level of vacant units has remained stable since the January 2006 survey at 8.9%. One mixed-use (A1/A3) unit has become an A3 restaurant since January 2006.

4.156 Since the survey conducted in October 2001, the number of units in each retail use class has remained relatively stable with a low vacancy rate, indicating that the current composition of Bushey Heath District Centre is viable and sustainable over the longer term. However, the 8.8% increase in the proportion of non-retail uses since October 2001, from a level of 20%, suggests a long-term trend that is likely to continue, in conjunction with a decrease in retail units in Bushey Heath District Centre. Since October 2001 the combined percentage of non-retail and A3, A4 and A5 uses has increased by almost 6.7%. The proportion of A1 retail units has fallen by 13.4% since October 2001.

4.157 This analysis also includes shops units that are categorised as being 'edge of centre' as these shops also contribute to the shopping offer of the town. Therefore, the analysis in table 5.5 below has considered 51 units rather than the 45 units analysed in table 5.5 above.

4.158 Comparison and convenience retail floor space accounts for 45% of the shops in Bushey Heath, which is 10% more than in Bushey High Street. Whilst food and drink establishments are represented in the centre, they do not over dominate the shops in Bushey Heath, which is one aspect of a more viable retail centre.

4.159 Using the data collected in the July 2006 retail survey, 4 shops (8%) are classified as being a national multiple chain shop. 47 shops (92%) are considered to be occupied by independent, specialist or local traders.

Rents

4.160 The same agent that was able to provide data for Bushey High Street was also able to provide data for Bushey Heath. The agent stated that the prime part of the town centre is on both sides of the High Road in the central section from Belleview Road eastwards to the end of the set back parade. In this location rent levels are £28 per sq ft for A1 and A2 uses and £32 per sq ft for A3/4/5. The less valuable areas of floor space are the remainders of the parade on the southeastern end side of the High Road adjacent to the set back parade, and on the northwest side of the parade from Bellevue Road running westwards. Here the rent values are £26 per sq ft for A1 and A3 floor space and £30 per sq foot for A3/4/5.

4.161 Again the yield is 5.5-6.5% regardless of the use of the floor space and they generally did not have problems re-letting units in the prime area with the average time of an A1 unit being vacant for before it was re-let on average being 1-2 months, and an A3 unit being 0-1 months.

Accessibility

4.162 As with Bushey High Street the main modes of transport to the town would either be by private car or walking or cycling to the centre. There are three car parks in the town, one at either end of the High Road and a small lay-by in front of the set back parade in the centre of the town. Whilst bus routes also serve the town, running along the High Road, given that the role of the town is to serve local day to day shopping it is unlikely that many shoppers would be attracted to the town from a wide catchment area. However, there are some specialist shops, such as Cakes of Good Taste, that would attract shoppers from a wider area.

Footfall count

4.163 Bushey Heath had four footfall counts. This is the smallest district centre in the Borough. The middle sections of the High Road experiences the highest footfall counts, and the west side had a higher pedestrian flow than the east side. The northern end of the road had the lowest counts with 12 people passing in the 10 minutes period.

Crime

4.164 According to Hertfordshire Constabulary there have been just over 400 crimes recorded on the High Road between 2000 and 2006, this is similar to Potters Bar Parkfield ward, and therefore a relatively high figure for a district centre. This data has not been broken down by type of crime committed by ONS so would be difficult to comment on further.

Town centre environment

4.165 Bushey Heath High Road is comprised of generally newer buildings than High Street. The main buildings forming the centre of the main street are built within the last 50 years and the building on the south west side of the street has a staggered building line to form a large pavement area and a natural centre point. This helps to form a small inclusive district centre, which has an attractive appearance. The extreme ends of the smallest district centre in Hertsmere are formed of older individual buildings that produce a natural end point to the centre and encourage the centre point previously noted. As with several other centres, High Road benefits from wide pavements and street scene. There is also a certain level of on street parking, appropriate to the size of the centre and adds to the convenience of everyday shopping for Bushey heath residents.

Retailer and Business Survey for Bushey Heath

4.166 The lowest response rate, with 10 responses, was received from retailers and businesses from Bushey Heath High Road. However this is the smallest district centre in the hierarchy in Hertsmere. The majority of respondents were retailers, and all but one of these operate independent shops or businesses. The remaining respondent owns a franchise. It is notable that none of the respondents were part of multiple or national chains. Similarly to other centres in the district, the majority of people that use the shops and businesses here are local residents. One company thought that the majority of their clientele come from beyond Hertsmere's boundary, which is unsurprising given Bushey Heath's proximity to the London Borough of Harrow (see Tables in Appendix E).

4.167 Table 88 also shows that all of the respondents from Bushey Heath are leaseholders to their premises. No one owns the premises they operate from, but they all are all long term leases, rather than short term.

Premises

4.168 The size of the premises occupied by respondents in High Road varies considerably compared to other centres. Three respondents rent from 47-93 sq. m. and units over 140 sq. meters. One respondent rents premises less than 46 sq. m. and three did not respond (Table 89). Unusually compared to other centres, the majority leaseholders in Bushey Heath have been in their premises for 6-10 years, although there is a relatively even range of periods they have been there for (Table 91). Almost half of respondents did not state what their estimated sales were (Table 90), but the majority of respondents estimate sales to be over £200,000. There is also a rather wide disparity in monthly rents for Bushey Heath, shown in Table 92, however the majority pay between £601 and £2,000 per month.

4.169 Table 93 shows that nearly half of respondents are 'fairly satisfied' with their premises, and a third of the respondents are unsatisfied with the premises. The reason for dissatisfaction, similar to Bushey village and other centres is the lack of parking, and the poor condition of the premises. Other suggested reasons were that the premises was too small and a lack of suitable servicing. There was a minority of respondents that had plans to refurbish, with one business having plans to refurbish internally and externally.

Relocation and business closures

4.170 According to tables 96 to 98, there are few plans to relocate. A reason given for possible relocation was that rent or business rates were too high. No other places were suggested as alternative locations.

Turnover

4.171 Table 99 represented businesses turnover in the centre. The majority of business turnovers have been increasing in the last three years, however some have not, and others did not state whether turnover was increasing or decreasing. Table 100 states that increased competition, rent increases and road works were the most influential factors affecting turnover in the past year.

Main challenges facing businesses

4.172 Looking to the future, the majority of respondents expect their business to expand or stay the same over the next five years. The main challenges identified by retailers and businesses were crime and vandalism, low pedestrian flow outside the premises and parking restrictions.

Rating of Bushey Heath High Road facilities

4.173 There was a unanimous opinion in Bushey Heath that although the range of the shops was 'poor', the quality of them was 'average', as was the quality of restaurant, cafes and takeaways in the centre (Table 103). 6 out of 8 respondents feel that the range of leisure and recreational facilities in the centre was 'poor', and there were no responses to what the quality was. 80% of respondents highlighted security measures as 'poor', but the quality of street furniture, and cleanliness and tidiness of the centre was 'average'.

4.174 In terms of accessibility, the majority of respondents felt accessibility by public transport, by foot and by car was 'average', but parking provision was 'poor'.

Town centre performance

4.175 Out of the ten responses in Table 104, economic performance for Bushey Heath was rated as 'average' to 'fairly good'.

Evening economy

4.176 There were few respondents in Table 105 that showed retailers and businesses as unsatisfied with the evening economy. The majority of respondents were 'fairly satisfied' or 'satisfied' with restaurants, takeaways, pubs and bars. One respondent was 'very satisfied' with the evening economy.

Shopper Survey Results

4.177 Thirteen of all the shoppers surveyed use Bushey Heath High Road as their regular centre, of which most stay in Bushey Heath for most of their shopping, but one respondent said they shop in Bushey village. Respondents said that they only get to the centre either via car or by foot; no other forms of transport are used to get there. Shoppers in Bushey Heath take up to 15 minutes to get to the centre, probably on account of half of shoppers walking there. One quarter of respondents in Bushey Heath said that parking was not a problem, although half of respondents did not think it was.

4.178 Similarly to other district centres, the most popular reasons for visiting the centre is for food shopping, the bank, the post office, the doctor and the dentist. No respondents said they visited the centre to buy high order goods. Again, the lack of car parking is highlighted as a problem in this centre, with 47% saying it is a problem, otherwise the level of traffic congestion and the lack of national multiples may also be raised as issues in Bushey Heath.

4.179 There were no respondents to this survey that stated that they spent more than £100 on shopping in Bushey Heath in a month. All respondents that said they go to Watford for some of their shopping go at least 1-2 times a months, other popular alternative shopping centres for respondents that usually go to Bushey Heath are central London, London Colney and Brent Cross, where they shop for clothes and food.

Conclusion for Bushey village and Bushey Heath

4.180 The fact that the overall settlement of Bushey has two centres reflects how the town has grown and the suburban sprawl has joined what previously would have been two separate villages. Both towns serve a very similar role of providing for local day-to-day shopping needs, plus other functions such as hairdressers, vets, estate agents and specialist shops for the local community. The large nearby sub-regional centre of Watford dominates shopping patterns of many local residents for larger goods, clothing and footwear.

4.181 Bushey Heath, given its low vacant units, high level of A1 retail shops and higher pedestrian numbers in the town can be considered to be functioning and performing well, and is a stronger performing centre than Bushey village High Street. The High Street seems to be fairing less well with lower footfall counts, a poorer pedestrian environment, lower levels of retail shops and higher levels of vacant units. Consideration should be given to policies to ensure the diversification of Bushey village to boost its appeal or downgrading the status of the High Street to a neighbourhood centre rather than a district centre.

Evaluation for the health of centres in Hertsmere

4.174 Overall the state of the centre in the borough is considered to be relatively healthy. None of the centres are sub-regional, which would attract significant numbers of shoppers from a wide catchment area. The Shopper Survey demonstrated that most people who live in a town in Hertsmere only visit the town or district centre that they live in on a regular basis. All of the main centres seek to meet the local daily convenience needs of the immediate area. The largest centre of Borehamwood is the only one that may attract some people from further afield to the shops that are located in the Boulevard shopping park. The Shopper Survey revealed that there is a lack of comparison retailing in the borough, for which respondents have to travel out of Hertsmere to find. There is a small percentage of specialist comparison retailing in the Borough, but most of these business tend to be locally owned and struggling with rent and low passing trade.

4.175 There is therefore an indication that some district centres struggle to meet the current thresholds for A1 retail units. The thresholds for retail and other uses in individual centres should be set to encourage the appropriate mix of units, according to that centres role in the borough and the current state of the centre. It is evident that the layout and geography of each centre is important in determining the level of retail and non-retail units in which locations to promote a viable healthy centre. Local accessibility, the centre's environment, existing proportions of retail, non-retail and vacant shop units, and viability should all be taken into account when considering how to encourage footfall and promote each centre as somewhere to shop.

Appendices

Appendix A - Retailer and Business Survey for Borehamwood Shenley Road

Table 1: Breakdown of business type

	Percentage
Retailer	48% (21)
Restaurant/café/takeaway/pub	16% (7
Professional/financial services	20% (9)
Personal and other services	11 % (5)
Other	5% (2)

Table 2: Business structure

	Percentage
National multiple chain	23% (10)
Part of regional multiple chain	4.5% (2)
Independent/individual	68.% (30)
Other	4.5% (2)

Table 3: Main users/Source of business

	Percentage
Local residents	84.% (37)
People working in the town centre	4.5% (2)
Local residents and those working in the town centre	11.5% (5)

Table 4: Business tenure

	Percentage
Owner/freeholder	16% (7)
Leaseholder	75% (33)
License/short-term rental	4.5% (2)
Other /not stated	4.5% (2)

Table 5: Size of premises

	Percentage
Up to 46 sq m	20% (9
47 - 93 sq m	23% (10)
94 - 140 sq m	16% (7
Over 140 sq m	18% (8)
No response	23% (10)

Table 6: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	5% (2)	Less than £20,000	2% (1)
£20,001 - £40,000	2% (1)	£20,001 - £40,000	2% (1)
£40,001 - £60,000	7% (3)	£40,001 - £60,000	5% (2)
£60,001 - £80,000	2% (1)	£60,001 - £80,000	2% (1)
£80,001 - £100,000	7% (3)	£80,001 - £100,000	5 % (2)
£100,001 - £125,000	7% (3)	£100,001 - £125,000	7% (3)
£125,001 - £150,000	11% (5)	£125,000 - £150,000	5% (2)
£150,001 - £200,000	2% (1)	£150,001 - £200,000	0% (0)
Over £200,000	32% (14)	Over £200,000	34 % (15)
Not stated	25% (11)	Not stated	36 % (16)

Table 7: Number of years in current premises

	Percentage
Less than 1 year	11.4% (5)
1 - 5 years	18.1% (8)
6 - 10 years	27.3% (12)
11 years or more	41% (18)
Not stated	2.2% (1)

Table 8: Monthly rent for current premises

	Percentage		Percentage (No)
Less than £600	7% (3)	£4,001 - £5,000	5% (2)
£601 - £800	5% (2)	£5,001 - £6,000	0% (0)
£801 - £1,000	2% (1)	£6,001 - £7,000	2% (1)
£1,001 - £2,000	36% (16)	£7,001 - £8,000	2% (1)
£2,001 - £3,000	9% (4)	£8,001 - £9,000	0% (0)
£3,001 - £4,000	0% (0)	More than £9,000	5% (2)
Not stated	27% (12)		

Table 9: Satisfaction with current premises

	Percentage		Percentage (No)
Very satisfied	23% (10)	Unsatisfied	18% (8)
Fairly satisfied	15% (7)	Very unsatisfied	7% (3)
Satisfied	34% (15)	Not stated	2% (1)

Table 10: Reason for dissatisfaction with current premises

	No		No
Too large	0	Other (1) - Rent/rates too high	1
Too small	2	Other (2) - Too many fast food shops	1
In poor condition	6	Other (3) - Not enough flow of customers	1
Lack of suitable servicing	3	Not stated	11
Lack of parking	10		

Table 11: Plans for refurbishment

	Percentage
Yes - Internal refurbishment	18% (8)
Yes - External refurbishment	0% (0)
Yes - Internal and external	9% (4)
No	71% (31)
Not stated	2% (1)

Table12: Plans to relocate and reasons

	Percentage
Rents or business rates too high	20.45% (9)
Need to access more customers	4.54% (2)
Rents/business rates too high + need to access more customers	4.54% (2)
Other 1: Premises in poor state	4.54% (2)

Table 13: Where intended to locate

	Percentage
Within any of the other town centres listed in Q1	9% (4)
Anywhere else (Please specify)	11.36% (5)
Not known	4.54% (2)
Not stated	9% (4)

Table 14: Intention to close business and reasons

	Percentage
Rent or business rates too high	11% (5)
Profit margins too low	5% (2)
Other: Competition from GIANTS/Tesco	5% (2)

Table 15: Turnover in the past three years

	Percentage
Increasing	16% (7)
Decreasing	39% (17)
No change	34% (15)
Not stated	11 % (5)

Table 16: Main factors that affected business turnover in the past year

	Percentage
Rent increases	16% (7)
Increased competition	25% (11)
None	18% (8)
Other 1: Parking	6.8% (3)
Other 2: Competition from Tesco	6.8% (3)
Other 3	9% (4)
Markets	2% (1)
Low footfall	2% (1)
Education policies	2% (1
Not stated	11.36 % (5)

Table 17: Business performance in the next five years

	Percentage
Stay the same	29% (13)
Expanding	23% (10)
Opening other branches	14% (6)
Looking to sell	14% (6)
Close	7% (3)
Other: Move to another area)	2% (1)
Decreasing in profit	2% (1)
Not stated	9% (4)

Table 18: Main challenges faced by retailers/businesses within town centre

	No
Crime and vandalism	12
Poor quality environment	18
Low pedestrian flow outside premises	18
Competition from all town centres in Hertsmere Competition specifically from Radlett	2 2
Competition from town centres outside Hertsmere Barnet Watford St. Albans Edgware Brent	 1 3 1 1 1
Competition form similar providers/traders	2
Insufficient passing trade	20
Lack of parking	3
Competition form Tesco	3
Too many charity shops	1
Continuous road works	1

Table 19: Rating of Borehamwood facilities

	Good	Average	Poor
	No	**No**	**No**
Quality of shops	7	27	11
Range of shops	6	24	15
Accessibility by car	10	19	13
Car parking provision	7	11	24
Accessibility by public transport	19	22	1
Ease with which pedestrians can move around	18	21	2
Restaurants/ cafes/takeaways	23	20	5
Crime/perception of crime	8	31	10
Security measures (e.g. CCTV)	10	16	10
Cleanliness/tidiness	4	17	21
Traffic and congestion	4	22	17
Range of leisure/recreation facilities	5	24	13
Quality of leisure/recreational facilities	6	24	14
Things to do in the evening	0	16	22
Quality of street furnishing/landscaping	5	21	17

Table 20: Borehamwood town centre economic performance

	Percentage (No)
Excellent	2% (1)
Fairly good	2% (1)
Average	52% (23)
Poor	20% (9)
Very poor	9 % (4)
Not stated	1.6% (6)

Table 21: Satisfaction with evening activities/facilities in Borehamwood

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant	1	12	15	3	
Takeaway	1	16	9	4	
Pubs/bars		15	9	3	3

Appendix B - Retailer and Business Survey for Potters Bar Darkes Lane

Table 22: Breakdown of business type

	Percentage
Retailer	51% (18)
Restaurant/café/takeaway/pub	11% (4)
Professional/financial services	29% (10)
Personal and other services	9% (3)

Table 23: Business structure

	Percentage
National multiple chain	20% (7)
Part of regional multiple chain	3% (1)
Independent/individual	77% (27)

Table 24: Main users/Source of business

	Percentage
Local residents	77% (27)
People working in the town centre	0
Local residents and those working in the town centre	9% (3)
Hertsmere boundaries and beyond	11% (4)

Table 25: Business tenure

	Percentage
Owner/freeholder	11% (4)
Leaseholder	80% (28)
License/short-term rental	6% (2)
Other	3% (1)

Table 26: Size of premises

	Percentage
Up to 46 sq m	17% (6)
47 - 93 sq m	31.5% (11)
94 - 140 sq m	31.5% (11)
Over 140 sq m	6% (2)
No response	14% (5)

Table 27: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	2	Less than £20,000	1
£20,001 - £40,000	0	£20,001 - £40,000	1
£40,001 - £60,000	1	£40,001 - £60,000	0
£60,001 - £80,000	1	£60,001 - £80,000	3
£80,001 - £100,000	2	£80,001 - £100,000	2
£100,001 - £125,000	2	£100,001 - £125,000	1
£125,001 - £150,000	2	£125,000 - £150,000	2
£150,001 - £200,000	6	£150,001 - £200,000	5
Over £200,000	9	Over £200,000	11
Not stated/not applicable	10	Not stated/not applicable	7

Table 28: Number of years in current premises

	Percentage
Less than 1 year	4
1 - 5 years	9
6 - 10 years	4
11 years or more	16
Not stated	2

Table 29: Monthly rent for current premises

	Percentage		Percentage (No)
Less than £600	1	£4,001 - £5,000	1
£601 - £800	6	£5,001 - £6,000	0
£801 - £1,000	3	£6,001 - £7,000	0
£1,001 - £2,000	9	£7,001 - £8,000	0
£2,001 - £3,000	5	£8,001 - £9,000	0
£3,001 - £4,000	1	More than £9,000	2
Not stated/owner occupier	7		

Table 30: Satisfaction with current premises

	Percentage	Number
Very satisfied	11%	4
Satisfied	20%	7
Fairly satisfied	48%	16
Unsatisfied	11%	4
Very unsatisfied	11%	4

Table 31: Reason for dissatisfaction with current premises

	Percentage		Percentage (No)
Too large	0%	Lack of suitable servicing	13%
Too small	5%	Lack of parking	64%
In poor condition	5%	Other 1: Competition	13%

Table 32: Plans for refurbishment

	Percentage	Number
Yes - Internal refurbishment	20%	7
Yes - External refurbishment	11%	4
No	69%	24

Table 33: Plans to relocate and reasons

	Percentage
Rents or business rates too high	53%
Need to access more customers	20%
Larger premises	13%
Too small	7%
No parking	7%

Table 34: Where intended to locate

	Percentage
Within any of the other town centres listed in Q1 - Stay in Darkes Lane Potters Bar High St	20% 10%
Anywhere else - Welwyn Garden City Luton Hatfield London/closer to London Ware	20% 10% 10% 20% 10%

Table 35: Intention to close business and reasons

	Percentage
Rent or business rates too high	79% (11)
Profit margins too low	14% (2)
Other 1: Too much competition from supermarkets	7% (1)

Table 36: Turnover in the past three years

	Percentage
Increasing	35%
Decreasing	35%
No change	26%
Not stated	4%

Table 37: Main factors that affected business turnover in the past year

	Percentage
Rent increases	26% (9)
Increase in competition	31% (11)
None	17% (6)
Other 1: Parking/lack of free staff parking	14% (5)
Other 2: Decrease in shoppers	6% (2)
Other 3: Poor quality shops	3% (1)
Other 4: Increased competition	3% (1)

Table 38: Business performance in the next five years

	Percentage
Stay the same	29% (10)
Expanding	29% (10)
Opening other branches	6% (2)
Looking to sell	21% (7)
Close	12% (4)
Other 1: Parking	3% (1)

Table 39: Main challenges faced by retailers/businesses within town centre

	Percentage
Crime and vandalism	12
Poor quality environment	8
Low pedestrian flow outside premises	23
Competition from town centres outside Hertsmere	3
Insufficient passing trade	14

Table 40: Rating of Potters Bar (Darkes Lane) facilities

	Good	Average	Poor
Quality of shops	4	16	16
Range of shops	-	10	25
Accessibility by car	4	19	10
Car parking provision	2	13	18
Accessibility by public transport	13	18	3
Ease with which pedestrians can move around	17	17	1
Restaurants/ cafes/takeaways	12	14	8
Crime/perception of crime	3	14	16
Security measures (e.g. CCTV)	6	12	17
Cleanliness/tidiness	4	21	9
Traffic and congestion	3	20	7
Range of leisure/recreation facilities	4	24	12
Quality of leisure/recreational facilities	3	18	8
Things to do in the evening	0	13	20
Quality of street furnishing/landscaping	12	16	6

Table 41: Rating Potters Bar Darkes Lane performance

	Percentage
Excellent	0
Fairly good	6% (2)
Average	37% (13)
Poor	46% (16)
Very poor	11% (4)

Table 42: Satisfaction with evening activities/facilities in Darkes Lane

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant		13	12	3	4
Takeaway		14	10	2	4
Pubs/bars		14	12	2	6

Appendix C - Retailer and Business Survey for Potters Bar High Street

Table 43: Breakdown of business type

	Percentage
Retailer	50% (12)
Restaurant/café/takeaway/pub	21% (5)
Professional/financial services	12.5% (3)
Personal and other services	12.5% (3)
Other	4% (1)

Table 44: Business structure

	Percentage
National multiple chain	13% (3)
Part of regional multiple chain	4% (1)
Independent/individual	83% (20)

Table 45: Main users/Source of business

	Percentage
Local residents	58% (14)
People working in the town centre	4% (1)
Local residents and those working in the town centre	4% (1)
Other 1: Beyond Hertsmere	25% (6)
Other 2: National	8% (2)

Table 46: Business tenure

	Percentage
Owner/freeholder	33% (8)
Leaseholder	54% (13)
License/short-term renta	13% (3)

Table 47: Size of premises

	Percentage
Up to 46 sq m	17% (4)
47 - 93 sq m	25% (6)
94 - 140 sq m	28% (7)
Over 140 sq m	21% (5)
No response	8% (2)

Table 48: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	-	Less than £20,000	-
£20,001 - £40,000	4% (1)	£20,001 - £40,000	4% (1)
£40,001 - £60,000	8% (2)	£40,001 - £60,000	-
£60,001 - £80,000	-	£60,001 - £80,000	-
£80,001 - £100,000	4% (1)	£80,001 - £100,000	4% (1)
£100,001 - £125,000	-	£100,001 -£125,000	4% (1)
£125,001 - £150,000	-	£125,000 - £150,000	-
£150,001 - £200,000	4% (1)	£150,001 - £200,000	4% (1)
Over £200,000	38% (9)	Over £200,000	42% (10)
Not stated/not applicable	42% (10)	Not stated/not applicable	42% (10)

Table 49: Number of years in current premises

	Percentage
Less than 1 year	-
1 - 5 years	25% (6)
6 - 10 years	8% (2)
11 years or more	67% (16)

Table 50: Monthly rent for current premises

	Percentage		Percentage
Less than £600	8% (2)	£4,001 - £5,000	-
£601 - £800	13% (3)	£5,001 - £6,000	-
£801 - £1,000	4% (1)	£6,001 - £7,000	-
£1,001 - £2,000	13% (3)	£7,001 - £8,000	-
£2,001 - £3,000	4% (1)	£8,001 - £9,000	-
£3,001 - £4,000	4% (1)	More than £9,000	29% (7)
Not stated/own premises	25% (6)		

Table 51: Satisfaction with current premises

	Percentage
Very satisfied	21% (5)
Satisfied	29% (7)
Fairly satisfied	33% (8)
Unsatisfied	4% (1)
Very unsatisfied	8% (2)
Not stated	4% (1)

Table 52: Reason for dissatisfaction with current premises

	Percentage		Percentage
Too large	-	Lack of suitable servicing	8% (2)
Too small	-	Lack of parking	21% (5)
In poor condition	13% (3)	Other (1) Rates too high	4% (1)

Table 53: Plans for refurbishment

	Percentage
Yes - Internal refurbishment	21% (5)
Yes - External refurbishment	13% (3)
No	63% (15)
Internal and external	4% (1)

Table 54: Plans to relocate and reasons

	Percentage
Rents or business rates too high	25% (6)
Need to access more customers	13% (3)
Other 1: Save costs	4% (1)

Table 55: Where intended to locate

	Percentage
Within any of the other town centres listed in Q1 Radlett Not specified	4% (1) 4% (1)
Anywhere else? Hatfield Not specified	4% (1) 4% (1)

Table 56: Intention to close business and reasons

	Percentage
Rent or business rates too high	21% (5)
Profit margins too low	(0)

Table 57: Turnover in the past three years

	Percentage
Increasing	13% (3)
Decreasing	42% (10)
No change	46% (11)

Table 58: Main factors that affected business turnover in the past year

	Percentage
Rent /rate increases	28% (7)
Increased competition	46% (11)
None	8% (2)
Other 1: Parking	4% (1)
Other 2: Change of market	4% (1)
Not stated	8% (2)

Table 59: Business performance in the next five years

	Percentage
Stay the same	67% (16)
Expanding	21% (5)
Opening other branches	0% (0)
Looking to sell	8% (2)
Close	0% (0)
Not stated	4% (1)

Table 60: Main challenges faced by retailers/businesses within town centre

	Number
Crime and vandalism	8
Poor quality environment	3
Low pedestrian flow outside premises	10
Competition from town centres outside Hertsmere Watford Not specified	1 1
Insufficient passing trade	10
Other 1: Competition from Tesco	2
Other 2: Online businesses/internet	1

Table 61: Rating of Potters Bar High Street facilities

	Good	Average	Poor
	%	%	%
Quality of shops	21% (5)	58% (14)	21% (5)
Range of shops	8% (2)	46% (11)	42% (10)
Accessibility by car	46% (11)	42% (10)	8% (2)
Car parking provision	21% (5)	58% (14)	21% (5)
Accessibility by public transport	33% (8)	50% (12)	13% (3)
Ease with which pedestrians can move around	71% (17)	33% (8)	0 % (0)
Restaurants/cafes/takeaways	50% (12)	38% (9)	17% (4)
Crime/perception of crime	13% (3)	54% (13)	25% (6)
Security measures (e.g. CCTV)	4% (1)	42% (10)	46% (11)
Cleanliness/tidiness	17% (4)	79% (19)	8% (2)
Traffic and congestion	17% (4)	71% (17)	13% (3)
Range of leisure/recreation facilities	17% (4)	58.3% (14)	13% (3)
Quality of leisure/recreational facilities	25% (6)	42% (10)	17% (4)
Things to do in the evening	4% (1)	42% (10)	50% (12)
Quality of street furnishing/landscaping	13% (3)	62.5% (15)	21% (5)

Table 62: Rating Potters Bar High Street economic performance

	Percentage
Excellent	-
Fairly good	13% (3)
Average	50% (12)
Poor	17% (4)
Very poor	-
No response	21% (5)

Table 63: Satisfaction with evening activities/facilities in Potters Bar High Street

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant	25% (6)	25% (6)	33% (8)	0	8% (2)
Takeaway	17% (4)	2% (7)	33% (8)	13% (3)	4% (1)
Pubs/bars	13% (3)	25% (6)	25% (6)	17% (4)	4% (1)

Appendix D - Retailer and Business Survey for Bushey High Street

Table 64: Breakdown of business type

	Percentage
Retailer	47% (9)
Restaurant/café/takeaway/pub	11% (2)
Professional/financial services	26% (5)
Personal and other services	11% (2)
Other	5% (1)

Table 65: Business structure

	Percentage
National multiple chain	16% (3)
Part of regional multiple chain	0
Independent/individual	79% (15)
Not stated	5% (1)

Table 66: Main users/Source of business

	Percentage
Local residents	84% (16)
People working in the town centre	0
Local residents and those working in the town centre	0
Beyond Hertsmere boundaries and/or national	5% (1)
National	11% (2)

Table 67: Business tenure

	Percentage
Owner/freeholder	53% (10)
Leaseholder	37% (7)
License/short-term rental	5% (1)
Other/not stated	5% (1)

Table 68: Size of premises

	Percentage
Up to 46 sq m	21% (4)
47 - 93 sq m	31% (6)
94 - 140 sq m	21% (4)
Over 140 sq m	16% (3)
No response	11% (2)

Table 69: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	-	Less than £20,000	-
£20,001 - £40,000	-	£20,001 - £40,000	-
£40,001 - £60,000	11% (2)	£40,001 - £60,000	11% (2)
£60,001 - £80,000	5% (1)	£60,001 - £80,000	11% (2)
£80,001 - £100,000	5% (1)	£80,001 - £100,000	5% (1)
£100,001 - £125,000	16% (3)	£100,001 - £125,000	0
£125,001 - £150,000	0	£125,000 - £150,000	5% (1)
£150,001 - £200,000	5% (1)	£150,001 - £200,000	5% (1)
Over £200,000	21% (4)	Over £200,000	26% (5)
Not stated/not applicable	37% (7)	Not stated/not applicable	37% (7)

Table 70: Number of years in current premises

	Percentage
Less than 1 year	0
1 - 5 years	42% (8)
6 - 10 years	26% (5)
11 years or more	32% (6)

Table 71: Monthly rent for current premises

	Percentage		Percentage
Less than £600	0	£4,001 - £5,000	0
£601 - £800	0	£5,001 - £6,000	5% (1)
£801 - £1,000	5%(1)	£6,001 - £7,000	0
£1,001 - £2,000	16% (3)	£7,001 - £8,000	0
£2,001 - £3,000	5% (1)	£8,001 - £9,000	0
£3,001 - £4,000	0	More than £9,000	5% (1)
Owner-occupier	11% (2)		
Not stated	63% (10)		

Table 72: Satisfaction with current premises

	Percentage
Very satisfied	26% (5)
Satisfied	21% (4)
Fairly satisfied	32% (6)
Unsatisfied	16% (3)
Very unsatisfied	5% (1)

Table 73: Reason for dissatisfaction with current premises

	Number		Number
Too large	0	Lack of suitable servicing	0
Too small	1	Lack of parking	4
In poor condition	1		

Table 74: Plans for refurbishment

	Percentage
Yes - Internal refurbishment	16% (3)
Yes - External refurbishment	11% (2)
No	68% (13)
Not stated	5% (1)

Table 75: Plans to relocate and reasons

	Number
Rents or business rates too high	2
Need to access more customers	1
Other 1: Need for bigger premises	1

Table 76: Where intended to locate

	Number
Within any of the town centres listed in Q1 (please state where)	3
Anywhere else (Please specify)	0

Table 77: Intention to close business and reasons

	Number
Rent or business rates too high	2
Profit margins too low	0

Table 78: Turnover in the past three years

	Percentage
Increasing	53% (10)
Decreasing	21% (4)
No change	21% (4)
Not stated	5% (1)

Table 79: Main factors that affected business turnover in the past year

	Percentage
Rent increases	5% (1)
Increased competition	16% (3)
None	11% (2)
Other 1: Parking	11% (2)
Drop in footfall	5% (1)
Deteriorating physical conditions	5% (1)
High business rates	11% (2)
Business closures I the town centre	5% (1)
Expansion of company (positive impact)	5% (1)
Not stated	26% (5)

Table 80: Business performance in the next five years

	Percentage
Stay the same	47% (9)
Expanding	21% (4)
Opening other branches	5% (1)
Looking to sell	16% (3)
Close	5% (1)
Other 1: Decreasing slowly	5% (1)

Table 81: Main challenges faced by retailers/businesses within town centre

	Number
Crime and vandalism	7
Poor quality environment	2
Low pedestrian flow outside premises	10
Competition from town centres outside Hertsmere: Watford	4
Insufficient passing trade	6
Other 1: Parking	2
None	1
Not stated	2

Table 82: Rating of Bushey High Street facilities

	Good	Average	Poor
Quality of shops	3	11	5
Range of shops	1	6	13
Accessibility by car	6	12	1
Car parking provision	8	8	4
Accessibility by public transport	10	10	0
Ease with which pedestrians can move around	8	12	0
Restaurants/cafes/takeaways	8	9	3
Crime/perception of crime	3	9	8
Security measures (e.g. CCTV)	1	4	14
Cleanliness/tidiness	3	11	6
Traffic and congestion	3	11	6
Range of leisure/recreation facilities	2	11	7
Quality of leisure/recreational facilities	3	9	6
Things to do in the evening	1	9	9
Quality of street furnishing/landscaping	1	7	10

Table 83: Rating Bushey High Street economic performance

	Percentage
Excellent	0
Fairly good	16% (3)
Average	42% (8)
Poor	26% (5)
Very poor	5% (1)
Not stated	11% (2)

Table 84: Satisfaction with evening activities/facilities in Bushey High Street

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant	5	6	5	0	1
Takeaway	4	6	5	2	0
Pubs/bars	6	4	7	1	0

Appendix E - Retailer and Business Survey for Bushey Heath High Road

Table 85: Breakdown of business type

	Percentage
Retailer	70% (7)
Restaurant/café/takeaway/pub	10% (1)
Professional/financial services	20% (2)
Personal and other services	0

Table 86: Business structure

	Percentage
National multiple chain	-
Part of regional multiple chain	-
Independent/individual	90% (9)
Franchise	10% (1)

Table 87: Main users/Source of business

	Percentage
Local residents	80% (8)
People working in the town centre	-
Local residents and those working in the town centre	-
Beyond Hertsmere boundary	10% (1)
Not stated	10% (1)

Table 88: Business Tenure

	Percentage
Owner/freeholder	0
Leaseholder	100% (10)
License/short-term rental	0

Table 89: Size of Premises

	Percentage
Up to 46 sq m	10% (1)
47 - 93 sq m	30% (3)
94 - 140 sq m	0
Over 140 sq m	30% (3)
No response	30% (3)

Table 90: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	-	Less than £20,000	-
£20,001 - £40,000	-	£20,001 - £40,000	-
£40,001 - £60,000	-	£40,001 - £60,000	-
£60,001 - £80,000	-	£60,001 - £80,000	-
£80,001 - £100,000	-	£80,001 - £100,000	-
£100,001 - £125,000	-	£100,001 - £125,000	-
£125,001 - £150,000	10% (1)	£125,000 - £150,000	10% (10)
£150,001 - £200,000	20% (2)	£150,001 - £200,000	10% (10)
Over £200,000	30% (3)	Over £200,000	50% (5)
Not stated/not applicable	40% (4)	Not stated/not applicable	30% (3)

Table 91: Number of years in current premises

	Percentage
Less than 1 year	-
1 - 5 years	30% (3)
6 - 10 years	40% (4)
11 years or more	30% (3)

Table 92: Monthly rent for current premises

	Percentage		Percentage
Less than £600	-	£4,001 - £5,000	-
£601 - £800	10% (1)	£5,001 - £6,000	10% (1)
£801 - £1,000	20% (2)	£6,001 - £7,000	-
£1,001 - £2,000	30% (3)	£7,001 - £8,000	-
£2,001 - £3,000	-	£8,001 - £9,000	-
£3,001 - £4,000	-	More than £9,000	20% (2)
Not stated	10% (1)		

Table 93: Satisfaction with current premises

	Percentage
Very satisfied	0
Satisfied	20% (2)
Fairly satisfied	40% (4)
Unsatisfied	30% (3)
Very unsatisfied	10% (1)

Table 94: Reason for dissatisfaction with current premises

	Percentage		Percentage
Too large	-	Lack of suitable servicing	10% (1)
Too small	10% (1)	Lack of parking	20% (2)
In poor condition	20% (2)	Other 1: Unhelpful landlord	10% (1)
		Other 2: Too small and lack parking	10% (1)

Table 95: Plans for refurbishment

	Percentage
Yes - Internal refurbishment	10% (1)
Yes - External refurbishment	10% (1)
No	80% (8)

Table 96: Plans to relocate and reasons

	Number
Rents or business rates too high	10% (1)
Need to access more customers	-

Table 97: Where intended to locate

	Number
No response	

Table 98: Intention to close business and reasons

	Percentage
Rent or business rates too high	10% (1)
Profit margins too low	-
Other (please state)	-

Table 99: Turnover in the past three years

	Percentage
Increasing	50% (5)
Decreasing	20% (2)
No change	30% (3)

Table 100: Main factors that affected business turnover in the past year

	Percentage
Rent increases	10% (1)
Increased competition	20% (1)
None	-
Other 1: Road works	10% (1)

Table 101: Business performance in the next five years

	Percentage
Stay the same	30% (3)
Expanding	40% (4)
Opening other branches	0
Looking to sell	10% (1)
Close	0

Table 102: Main challenges faced by retailers/businesses within town centre

	Percentage
Crime and vandalism	50% (5)
Poor quality environment	-
Low pedestrian flow outside premises	40% (4)
Competition from town centres outside Hertsmere: Harrow	10% (1)
Insufficient passing trade	20% (2)
Other 1: Parking restrictions/lack of parking	40% (4)
Other 2: Closure of bank branches	10% (1)

Table 103: Rating of Bushey Heath facilities

	Good	Average	Poor
Quality of shops	0	8	0
Range of shops	1	2	5
Accessibility by car	2	4	1
Car parking provision	2	1	6
Accessibility by public transport	1	5	3
Ease with which pedestrians can move around	3	5	0
Restaurants/cafes/takeaways	3	6	0
Crime/perception of crime	2	3	4
Security measures (e.g. CCTV)	0	0	8
Cleanliness/tidiness	0	5	3
Traffic and congestion	2	7	1
Range of leisure/recreation facilities	0	2	6
Quality of leisure/recreational facilities	0	0	0
Things to do in the evening	0	1	7
Quality of street furnishing/landscaping	1	4	4

Table 104: Rating Bushey Heath economic performance

	Percentage
Excellent	0
Fairly good	40% (4)
Average	50% (5)
Poor	10% (1)
Very poor	-

Table 105: Satisfaction with evening activities/facilities in Bushey Heath

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant		4	5		
Takeaway		3	5		
Pubs/bars	1	3	2	2	1

Appendix F - Retailer and Business Survey for Radlett Watling Street

Table 106: Breakdown of business type

	Percentage
Retailer	59% (13)
Restaurant/café/takeaway/pub	0% (0)
Professional/financial services	36 % (8)
Personal and other services	0% (0)
Other	5% (1)

Table 107: Business structure

	Percentage
National multiple chain	9% (2)
Part of regional multiple chain	5% (1)
Independent/individual	86% (19)

Table 108: Main users/Source of business

	Percentage
Local residents	77% (17)
People working in the town centre	0% (0)
Local residents and those working in the town centre	9% (2)
Beyond Hertsmere boundary	4% (1)
National	9% (2)

Table 109: Business tenure

	Percentage
Owner/freeholder	18% (4)
Leaseholder	73% (16)
License/short-term rental	0% (0)
Other /not stated	9% (2)

Table 110: Size of premises

	Percentage
Up to 46 sq m	41% (9)
47 - 93 sq m	18% (4)
94 - 140 sq m	9% (2)
Over 140 sq m	14% (3)
Not stated	18% (4)

Table 111: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	0% (0)	Less than £20,000	0% (0)
£20,001 - £40,000	14% (3)	£20,001 - £40,000	9% (2)
£40,001 - £60,000	5% (1)	£40,001 - £60,000	5% (1)
£60,001 - £80,000	18% (4)	£60,001 - £80,000	5% (1)
£80,001 - £100,000	0% (0)	£80,001 - £100,000	5% (1)
£100,001 - £125,000	9% (2)	£100,001 - £125,000	5% (1)
£125,001 - £150,000	5% (1)	£125,000 - £150,000	5% (1)
£150,001 - £200,000	5% (1)	£150,001 - £200,000	5% (1)
Over £200,000	14% (3)	Over £200,000	18% (4)
Not stated/not applicable	32% (7)	Not stated/not applicable	45 (10)

Table 112: Number of years in current premises

	Percentage
Less than 1 year	5% (1)
1 - 5 years	27% (6)
6 - 10 years	27% (6)
11 years or more	41% (9)

Table 113: Monthly rent for current premises

	Percentage		Percentage
Less than £600	14% (3)	£5,001 - £6,000	0
£601 - £800	5% (1)	£6,001 - £7,000	0
£801 - £1,000	14% (3)	£7,001 - £8,000	0
£1,001 - £2,000	23% (5)	£8,001 - £9,000	0
£2,001 - £3,000	23% (5)	More than £9,000	0
£3,001 - £4,000	0		
£4,001 - £5,000	5% (1)		
Owner- occupier/freeholder / not stated	18% (4)		

Table 114: Satisfaction with current premises

	Percentage
Very satisfied	27% (6)
Satisfied	27% (6)
Fairly satisfied	23% (5)
Unsatisfied	18% (4)
Very unsatisfied	5% (1)

Table 115: Reason for dissatisfaction with current premises

	Percentage		Percentage
Too large	0	Lack of suitable servicing	3
Too small	3	Lack of parking	8
In poor condition	1	Other: Rates high for a small business	1
		Other: Not stated	2

Table 116: Plans for refurbishment

	Percentage
Yes - Internal refurbishment	23% (5)
Yes - External refurbishment	0% (0)
No	77% (17)

Table 117: Plans to relocate and reasons

	Percentage
Rents or business rates too high	9% (2)
Need to access more customers	5% (1)
Other 1: Lack of parking	5% (1)
Other 2: Premises too small	5% (1)

Table 118: Where intended to relocate

	Percentage
Elsewhere in Radlett	9% (2)
Anywhere else	5% (1)
East London	5% (1)

Table 119: Intention to close business and reasons

	Percentage
Rent or business rates too high	14% (3)
Profit margins too low	5% (1)
Other (please state)	0

Table 120: Turnover in the past three years

	Percentage
Increasing	36% (8)
Decreasing	18% (4)
No change	36% (8)
Other 1: Fluctuating	5% (1)
Not stated	5% (1)

Table 121: Main factors that affected business turnover in the past year

	Percentage
Rent increases	36% (8)
Increased competition	18% (4)
None	36% (8)
Fluctuating	5% (1)
Not stated	5% (1)

Table 122: Business performance in the next five years

	Percentage
Stay the same	40%. (9)
Expanding	23% (5)
Opening other branches	9% (2)
Looking to sell	23% (5)
Close	0% (0)
Not stated	5% (1)

Table 123: Main challenges faced by retailers/businesses within town centre

	Number
Crime and vandalism	5
Poor quality environment	3
Low pedestrian flow outside premises	13
Competition from other town centres in Hertsmere: Borehamwood	2
Competition from town centres outside Hertsmere: London Colney	2
Insufficient passing trade	8
Other: Lack of parking/parking facilities	2
Other: Flooding	1
No response	3

Table 124: Rating of Radlett facilities

	Good	Average	Poor
Quality of shops	9	10	2
Range of shops	2	11	8
Accessibility by car	8	9	3
Car parking provision	6	10	5
Accessibility by public transport	5	9	5
Ease with which pedestrians can move around	11	9	1
Restaurants/cafes/takeaways	16	6	0
Crime/perception of crime	2	14	6
Security measures (e.g. CCTV)	2	8	13
Cleanliness/tidiness	4	12	5
Traffic and congestion	3	10	10
Range of leisure/recreation facilities	1	6	13
Quality of leisure/recreational facilities	1	7	11
Things to do in the evening	4	11	7
Quality of street furnishing/landscaping	4	12	6

Table 125: Radlett economic performance rating

	Percentage
Excellent	5% (1)
Fairly good	36% (8)
Average	41% (9)
Poor	9% (2)
Very poor	5% (1)
Not stated	5% (1)

Table 126: Satisfaction with evening activities/facilities in Radlett

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant	11	7	5		
Takeaway	6	13	3		
Pubs/bars	4	12	3	2	1

Appendix G - Footfall Counts October 2007

Borehamwood	Shenley Road outside Tesco (6)	Shenley Road opposite Tesco (6)	White-house/ Shenley South (7)	White-house/ Shenley North (5)	The Point, Shenley Road, South (8)	The Point, Shenley Road, North (4)	Boulevard Centre, Shenley Road (1/10)	Shenley Road, Petzone South (3)	Shenley Road, Petzone North (9)
Male child	0	0	2	5	1	2	5	3	0
Male teenager	1	1	2	0	7	1	1	1	0
Male 20 - 40	9	12	15	37	9	9	28	11	21
Male 41 - 65	20	6	11	21	12	21	15	6	9
Male 66+	4	3	4	8	2	9	19	1	0
Female child	1	0	3	5	0	3	7	0	1
Female teenager	0	1	1	4	3	0	0	0	0
Female 20 - 40	18	25	21	29	17	33	52	7	15
Female 41 - 65	18	8	13	39	10	26	32	5	10
Female 66+	2	5	7	17	7	8	17	2	2
TOTAL	**73**	**61**	**79**	**165**	**68**	**112**	**176**	**36**	**58**

Potters Bar Darkes Lane	Manor Road West	Manor Road East	Darkes Lane West	Darkes Lane East	Sainsbury's West	Sainsbury's East	The Broadway West	The Broadway East	TOTALS OF AGES
Male child	1	1	3		3	3	2	3	**16**
Male teenager	0	0	3	0	1	0	5	2	**11**
Male 20 - 40	8	4	4	9	7	0	11	4	**47**
Male 41 - 65	3	3	8	4	11	4	4	1	**38**
Male 66+	3	2	7	8	2	2	1	3	**28**
Female child	0	2	3	1	3	4	2	1	**16**
Female teenager	0	0	3	1	6	3	2	3	**18**
Female 20 - 40	5	1	14	15	14	7	11	7	**74**
Female 41 - 65	3	5	10	10	6	5	6	3	**48**
Female 66+	2	2	1	6	5	0	4	3	**23**
TOTAL	**25**	**20**	**56**	**54**	**58**	**28**	**48**	**30**	**319**

Potters Bar High Street	War Memorial West	War Memorial East	BP Garage West	BP Garage East	High Street Junction West Side	High Street Junction East Side	Barnet Road West	Barnet Road East	Opposite Bus Garage	TOTALS OF AGES
Male child	0	0	2	0	0	1	0	0	1	**4**
Male teenager	1	1	0	1	0	0	0	0	2	**5**
Male 20 - 40	2	2	11	1	13	3	7	7	2	**48**
Male 41 - 65	7	2	6	5	9	6	2	4	0	**41**
Male 66+	4	1	1	2	1	1	0	0	3	**13**
Female child	0	0	1	0	1	1	0	0	1	**4**
Female teen	0	0	0	1	2	0	1	0	2	**6**
Female 20 - 40	5	3	8	0	15	3	2	2	2	**40**
Female 41 - 65	5	1	5	3	11	4	3	2	2	**36**
Female 66+	3	2	2	0	2	1	1	1	2	**14**
TOTAL	**27**	**12**	**36**	**13**	**54**	**20**	**16**	**16**	**17**	**211**

Radlett Watling Street	Opposite Synagogue Watling Street	Station West	Station East	War Memorial West	War Memorial East	Post Office West	Post Office East	TOTALS OF AGES
Male child	1	1	3	1	5	3	1	**15**
Male teenager	0	0	3	0	2	2	3	**10**
Male 20 - 40	7	7	5	5	5	11	3	**43**
Male 41 - 65	6	1	5	6	5	8	2	**33**
Male 66+	3	1	1	6	6	3	5	**25**
Female child	2	1	1	0	3	3	4	**14**
Female teenager	2	0	1	6	5	1	3	**18**
Female 20 - 40	6	6	12	12	11	13	14	**74**
Female 41 - 65	3	2	3	10	5	6	15	**44**
Female 66+	1	2	4	5	3	4	6	**25**
TOTAL	**31**	**21**	**38**	**51**	**50**	**54**	**56**	**301**

Bushey High Street	Kemp Place/ High St. North	Kemp Place/ High St. South	Park Road/ High St. North	Park Road/ High St. South	Bournehall Road North	TOTALS OF AGES
Male child	0	0	0	0	2	**2**
Male teenager	1	0	2	0	1	**4**
Male 20 - 40	4	0	7	2	4	**17**
Male 41 - 65	6	0	6	0	4	**16**
Male 66+	5	0	4	0	0	**9**
Female child	0	0	3	0	3	**6**
Female teenager	1	0	0	0	0	**1**
Female 20 - 40	4	0	7	0	7	**18**
Female 41 - 65	4	0	5	0	5	**14**
Female 66+	4	1	4	0	3	**12**
TOTAL	**29**	**1**	**38**	**2**	**29**	**99**

Bushey Heath	Opposite The Rutts	Middle - High Road	Middle - High Road	Howton Place	TOTALS OF AGES
Male child	1	1	2	1	**5**
Male teenager	0	0	2	0	**2**
Male 20 - 40	1	9	9	7	**26**
Male 41 - 65	1	3	6	4	**14**
Male 66+	0	2	4	1	**7**
Female child	0	3	5	1	**9**
Female teenager	1	0	1	0	**2**
Female 20 - 40	3	16	10	8	**37**
Female 41 - 65	3	8	8	1	**20**
Female 66+	2	0	3	1	**6**
TOTAL	**12**	**42**	**50**	**24**	**128**

Appendix H - Shoppers Survey June 2007

This appendix summarises existing shopping patterns identified by the Shoppers' Survey undertaken as part of the Health Checks, which will help in evaluating existing provision, and help identify any potential future changes.

The Shopper Survey was an on street questionnaire survey of 195 shoppers across its six town and district centres. This survey sought to identify:

- Where residents go to do comparison retailing, broken down into sub-categories by types of goods, and convenience shopping trips;
- Shoppers underlying reasons for choosing a particular centre for different types of comparison shopping;
- How shoppers use shopping centres to determine the role of the centre;
- The shoppers views on the quality of the retail offer; and
- The normal mode of travel for shoppers for different types of shopping requirements, for example the difference in shopping and travelling patterns for comparison and convenience goods.

This appendix summarises the findings from the survey in Tables H1-13.

Table H1 - Where do you live?

Base 195 (100%)	Boreham-wood	Potters Bar	Bushey	Bushey Heath	Radlett	Shenley	Elstree	South Mimms	Other - no reply
Number of respondents	59 30.3%	51 (26%)	16 (8.20%)	13 (6.7%)	22 (11.3%)	7 (3.6)	1 (0.5%)	2 (1.0%)	24 (12.8%)

Table H2 - How often do you use the following centres?

	Borehamwood	Bushey Heath	Bushey High Street	Radlett	Potters Bar Darkes Lane	Potters Bar High Street
No of respondents	**70**	**21**	**11**	**33**	**45**	**14**
Never	46 (25.4%)	110 (60.8%)	113 (62.4%)	73 (40.3%)	98 (54.1%)	99 (54.7%)
Rarely	26 (14.4%)	20 (11.0%)	16 (8.8%)	33 (18.2%)	9 (6.0%)	12 (6.6%)
1-2 times per month	23 (12.7%)	7 (3.9%)	8 (4.4%)	10 (5.5%)	3 (1.7%)	11 (6.1%)
Once a week	23 (12.7%)	5 (2.8%)	9 (5.0%)	8 (4.4%)	6 (3.3%)	17 (9.4%)
2-3 times per week	28 (15.5%)	9 (5.0%)	6 (3.3%)	17 (9.4%)	25 (13.8%)	9 (5.0%)
Everyday	25 (13.8%)	4 (2.2%)	2 (1.1%)	11 (6.1%)	15 (8.3%)	6 (3.3%)

Table H3 - Which town centre do you visit most regularly?

Place of residence	Borehamwood	Bushey Heath	Bushey High Street	Radlett	Potters Bar Darkes Lane	Potters Bar High Street	Other - No reply
Borehamwood	59						
Potters Bar					40	11	
Bushey Village		7	8				1
Bushey Heath		12	1				
Radlett				22			
Shenley	3			4			
Elstree	1						
South Mimms					1	1	
No reply	7	2	2	7	4	2	

Table H4 - How do you normally get to the town centre?

	Borehamwood	Bushey Heath	Bushey High Street	Radlett	Potters Bar Darkes Lane	Potters Bar High Street
Number of respondents	**70**	**21**	**11**	**33**	**45**	**14**
Walk	38	13	4	15	23	6
Cycle	5	0	0	0	0	0
Bus	7	0	3	3	6	2
Train	1	0	0	0	0	0
Car/motorcycle	35	12	4	24	21	6

Table H5 - How long on average does it take you to get to the town centre?

	Borehamwood	Bushey Heath	Bushey High Street	Radlett	Potters Bar Darkes Lane	Potters Bar High Street
Number of respondents	**70**	**21**	**11**	**33**	**45**	**14**
0-5 mins	21 (30.0%)	10 (47.6%)	4 (36%)	14 (42%)	14 (31%)	2 (14%)
5-10 mins	31 (44.3%)	5 (23.8 %)	4 (36.4%)	10 (36.3%)	23 (51.1%)	6 (42%)
10-15 mins	10 (14.3%)	5 (23.8%)	2 (18.%)	4 (12%)	5 (11%)	5 (35%)
15-20 mins	6 (8.6 %)	1 (4.8%)	1 (9.1%)	3 (9.1%)	2 (4.4%)	1 (7.1%)
20 mins plus	2 (2.9%)	0 (0%)	0 (0%)	1 (3.0%)	1 (2.2%)	0 (0%)

Table H6 - If you arrive either by cycle, motorcycle or car, is parking a problem?

	Borehamwood	Bushey Heath	Bushey High Street	Radlett	Potters Bar Darkes Lane	Potters Bar High Street
Number of respondents	**70**	**21**	**11**	**33**	**45**	**14**
Yes	19 (27.1%)	5 (23.8 %)	2 (18.2%)	3 (9.1%)	10 (22.2%)	0 (0 %)
No	28 (40%)	10 (47.6%)	2 (18.2 %)	22 (66.7%)	No 16 (35.6%)	8 (57.1%)

Table H7 - What are your main reasons for going to the town centre (state top three reasons in order of priority)?

	Borehamwood	Bushey Heath	Bushey High Street	Radlett	Potters Bar Darkes Lane	Potters Bar High Street
Food	56 (80%)	17 (81%)	8 (72.7%)	27 (81.8%)	38 (84.4%)	12 (85.7%)
Clothes/ shoes	29 (41.4%)	1 (4.8)	1 (9.1%)	4 (12.1%)	5 (11.1%)	1 (7.1%)
High order goods	9 (12.9%)	0 (0%)	1 (9.1%)	0 (0%)	5 (11.1%)	1 (7.1%)
The market	23 (32.9%)	0 (0%)	1 (9.1%)	0 (0%)	1 (2.2%)	0 (0%)
Bank - post office	36 (51.4)	13 (61.9%)	8 (72.7%)	20 (60.6%)	42 (93.3%)	7 (50%)
Hairdressers	6 (8.6%)	1 (4.8%)	2 (18.2%)	5 (15.2%)	7 (15.6%)	3 (21.4%)
Library	7 (10.1%)	3 (14.3%)	2 (18.2)	7 (21.2)	4 (8.9%)	5 (35.7%)
Doctor - dentist - etc.	12 (17.1%)	8 (38.1%)	3 (27.3%)	13 (39.4%)	6 (13.3%)	6 (42.9%)
Leisure goods and services	16 (22.9%)	3 (14.3%)	1 (9.1%)	4 (12.1%)	10 (22.2%)	2 (13.3%)
On lunch break	11 (15.7%)	3 (14.3%)	0 (0%)	2 (6.1)	3 (6.7%)	0 (0%)

Table H8 - Do you consider any of the following to be problems in the town centre you use the most?

	Borehamwood		Bushey Heath		Bushey High Street		Radlett		Potters Bar Darkes Lane		Potters Bar High Street	
Number of respondents	**70**		**21**		**11**		**33**		**45**		**14**	
	Yes	**No**	**Yes**	**No**	**Yes**	**No**	**Yes**	**No**	**Yes**	**No**	**Yes**	**No**
Traffic - congestion	**54** 77%	**11** 16%	**7** 33%	**12** 57%	**3** 27%	**5** 46%	**19** 58%	**11** 33%	**20** 44%	**20** 44%	**4** 29%	**8** 57%
Lack of car parking	**34** 49%	**28** 40%	**10** 47%	**10** 48%	**4** 36%	**5** 46%	**7** 21%	**22** 67%	**19** 42%	**20** 44%	**6** 42%	**5** 36%
Poor bus service	**13** 19%	**28** 40%	0 0%	**11** 52%	**2** 18%	**5** 46%	**8** 24%	**7** 21%	**9** 20%	**17** 38%	**3** 21%	**3** 21%
Litter - gum on the street	**40** 57%	**25** 36%	**0** 0%	**19** 91%	**6** 55%	**4** 36%	**5** 15.2%	**26** 79%	**17** 38%	**25** 57%	**5** 35%	**4** 29%
Graffiti	**22** 31%	**40** 57%	**1** 5%	**18** 86%	**3** 27%	**5** 46%	**3** 9%	**27** 81%	**4** 9%	**36** 80%	**0** 0%	**9** 64%
Crime - fear of crime	**27** 39%	**39** 56%	**1** 5%	**18** 86%	**3** 27%	**5** 46%	**6** 18%	**25** 79%	**10** 22%	**31** 69%	**2** 14%	**9** 64%
Lack of national multiples	**18** 26%	**46** 6%	**7** 33%	**12** 57%	**4** 36%	**4** 36%	**3** 9%	**26** 79%	**27** 60%	**17** 38%	**6** 43%	**7** 50%
Overall appearance of the area and shops	**29** 41%	**32** 46%	**1** 5%	**18** 86%	**2** 18%	**6** 55%	**2** 6%	**28** 84%	**13** 29%	**28** 62%	**5** 36%	**7** 50%

Table H9 - Give an indication of the amount you spend each month on the following goods in the town centre that you use most.

Borehamwood	Less than £100	£100- 150	£150 - £200	£200 - £300	£300 - £500
Food	26	8	10	4	10
Clothes/ shoes:	44	7	3	0	0
Household - electrical	49	3	0	0	0
Leisure goods	50	3	2	0	0
Bushey Heath	Less than £100	£100- 150	£150 - £200	£200 - £300	£300 - £500
Food	14	1	0	1	0
Clothes/ shoes:	12	0	0	0	0
Household - electrical	11	0	0	0	0
Leisure goods	11	0	0	0	0
Bushey High Street	Less than £100	£100- 150	£150 - £200	£200 - £300	£300 - £500
Food	8	1	0	0	0
Clothes/ shoes:	7	0	0	0	0
Household - electrical	7	0	0	0	0
Leisure goods	8	0	0	0	0
Radlett	Less than £100	£100- 150	£150 - £200	£200 - £300	£300 - £500
Food	18	7	2	0	0
Clothes/ shoes:	15	2	1	0	0
Household - electrical	13	0	0	0	0
Leisure goods	17	2	0	0	0
Potters Bar Darkes Lane	Less than £100	£100- 150	£150 - £200	£200 - £300	£300 - £500
Food	18	6	3	4	2
Clothes – shoes:	23	0	0	1	1
Household – electrical	24	0	0	0	1
Leisure goods	23	0	1	0	1
Potters Bar High Street	Less than £100	£100- 150	£150 - £200	£200 - £300	£300 - £500
Food	2	3	2	4	1
Clothes/ shoes:	6	1	0	0	0
Household - electrical	7	0	0	0	0
Leisure goods	9	0	0	0	0

Table H10 - How often do you visit the following centres outside of the Borough?

Borehamwood	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	13	12	6	1	0
Watford	31	21	8	0	0
Brent Cross	31	6	5	0	0
Hatfield	19	7	0	0	0
St. Albans	31	14	3	0	0
Welwyn Garden City	11	4	2	1	0
Milton Keynes	9	0	0	0	0
Central London	33	8	3	4	0
Other (1)	5	1	2	0	0
Other (2)	4	0	0	0	0

Bushey Heath	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	8	3	0	0	0
Watford	0	5	9	5	1
Brent Cross	6	7	1	1	0
Hatfield	5	0	0	0	0
St. Albans	9	1	0	0	0
Welwyn Garden City	3	0	0	0	0
Milton Keynes	4	0	0	0	0
Central London	7	3	0	0	3
Other (1)	1	1	2	1	0
Other (2)	0	1	0	0	0

Bushey High Street	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	4	1	0	0	0
Watford	1	4	2	2	2
Brent Cross	3	1	0	0	0
Hatfield	0	0	0	0	0
St. Albans	3	2	1	0	0
Welwyn Garden City	1	0	0	0	0
Milton Keynes	0	0	0	0	1
Central London	6	2	0	0	0
Other (1)	0	1	0	1	0
Other (2)	0	0	0	0	0

Radlett	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	6	7	9	7	1
Watford	8	13	7	1	0
Brent Cross	13	8	2	0	0
Hatfield	10	0	0	0	0
St. Albans	14	12	2	2	0
Welwyn Garden City	4	1	0	0	0
Milton Keynes	2	0	0	0	0
Central London	18	5	3	0	0
Other (1)	1	1	1	1	0
Other (2)	0	1	1	0	0

Potters Bar Darkes Lane	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	12	17	4	1	1
Watford	9	8	2	1	0
Brent Cross	13	4	0	0	0
Hatfield	18	8	1	0	0
St. Albans	19	14	2	1	0
Welwyn Garden City	15	18	2	0	0
Milton Keynes	3	0	0	0	0
Central London	16	5	2	4	0
Other (1)	3	4	3	1	1
Other (2)	0	3	0	1	0

Potters Bar High Street	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	4	7	2	0	0
Watford	2	1	0	0	0
Brent Cross	1	0	0	0	0
Hatfield	2	5	0	0	0
St. Albans	4	7	0	0	0
Welwyn Garden City	5	2	0	0	0
Milton Keynes	0	0	0	0	0
Central London	0	3	2	0	0
Other (1)	2	3	1	0	0
Other (2)	0	3	0	0	0

Table H11 - What do you use the following centres for?

Location		Boreham-wood	Bushey Heath	Bushey High Street	Radlett	Potters Bar Darkes Lane	Potters Bar High Street
London Colney	Food	21	7	3	24	27	8
	Clothes/Shoes	17	9	3	18	25	10
	Household/Electrical	4	2	1	9	4	1
	Leisure	1	0	0	8	5	3
Watford	Food	10	15	9	7	2	2
	Clothes/Shoes	46	18	10	25	18	2
	Household/Electrical	22	13	8	20	8	0
	Leisure	13	8	4	14	4	1
Brent Cross	Food	2	3	0	2	0	0
	Clothes/Shoes	27	15	2	21	13	2
	Household/Electrical	12	6	0	12	6	2
	Leisure	6	4	0	3	1	1
Hatfield	Food	3	2	0	0	4	3
	Clothes/Shoes	14	2	0	6	9	3
	Household/Electrical	5	0	0	1	7	1
	Leisure	7	0	0	3	4	2
St. Albans	Food	12	1	2	11	8	4
	Clothes/Shoes	30	4	3	21	21	6
	Household/Electrical	8	2	2	7	11	1
	Leisure	12	3	2	10	8	3
Welwyn Garden City	Food	5	1	0	0	8	3
	Clothes/Shoes	7	0	1	4	23	4
	Household/Electrical	5	0	0	2	21	3
	Leisure	2	0	0	1	4	1
Milton Keynes	Food	1	0	0	0	0	0
	Clothes/Shoes	2	1	5	1	2	0
	Household/Electrical	1	1	0	0	3	0
	Leisure	2	0	0	0	0	0
Central London	Food	7	2	2	2	3	0
	Clothes/Shoe	27	6	1	14	15	3
	Household/Electrical	5	3	0	4	5	2
	Leisure	24	8	0	11	1	4

Table H13 - Indication of the amount of money spent each month on the following goods in the town centre that you use most outside of the Borough?

Borehamwood	Less than £100	£100 - 150	£150 - £200	£200 - £300	£300 - £500	£500 - £1000
Food	36	6	0	0	1	0
Clothes/shoes	40	6	0	1	0	0
Household - electrical	32	4	0	1	0	0
Leisure goods	34	3	0	0	0	0
Bushey Heath	Less than £100	£100 - 150	£150 - £200	£200 - £300	£300 - £500	£500 - £1000
Food	6	6	0	0	2	0
Clothes/shoes	5	6	2	0	0	0
Household - electrical	9	1	1	0	1	0
Leisure goods	10	2	1	0	0	0
Bushey High Street	Less than £100	£100 - 150	£150 - £200	£200 - £300	£300 - £500	£500 - £1000
Food	1	0	2	1	2	0
Clothes/shoes	4	1	0	0	1	0
Household - electrical	5	0	1	0	0	0
Leisure goods	4	1	0	0	0	0
Radlett	Less than £100	£100 - 150	£150 - £200	£200 - £300	£300 - £500	£500 - £1000
Food	6	5	4	1	1	0
Clothes/shoes	9	7	4	0	0	0
Household - electrical	18	2	0	0	0	0
Leisure goods	15	4	1	0	0	0
Potters Bar Darkes Lane	Less than £100	£100 - 150	£150 - £200	£200 - £300	£300 - £500	£500 - £1000
Food	21	7	1	3	0	0
Clothes/shoes	27	4	0	0	1	0
Household – electrical	25	4	0	1	0	0
Leisure goods	27	2	1	0	0	0
Potters Bar High Street	Less than £100	£100 - 150	£150 - £200	£200 - £300	£300 - £500	£500 - £1000
Food	6	0	1	1	0	0
Clothes/shoes	7	3	0	0	0	1
Household - electrical	7	0	0	0	0	0
Leisure goods	4	2	0	0	0	0

Appendix I - Definitions from the Use Classes Order 2005

A1 Shops – Retail sale of goods to the public, including sandwich bars and Internet cafes

A2 Financial and professional services – Banks, estate and employment agencies

A3 Restaurants and cafes – For the sale of food and drink for consumption on the premises

A4 Drinking establishments – Public houses and wine bars, not including nightclubs

A5 Hot food takeaways – For the sale pf hot food for consumption off the premises

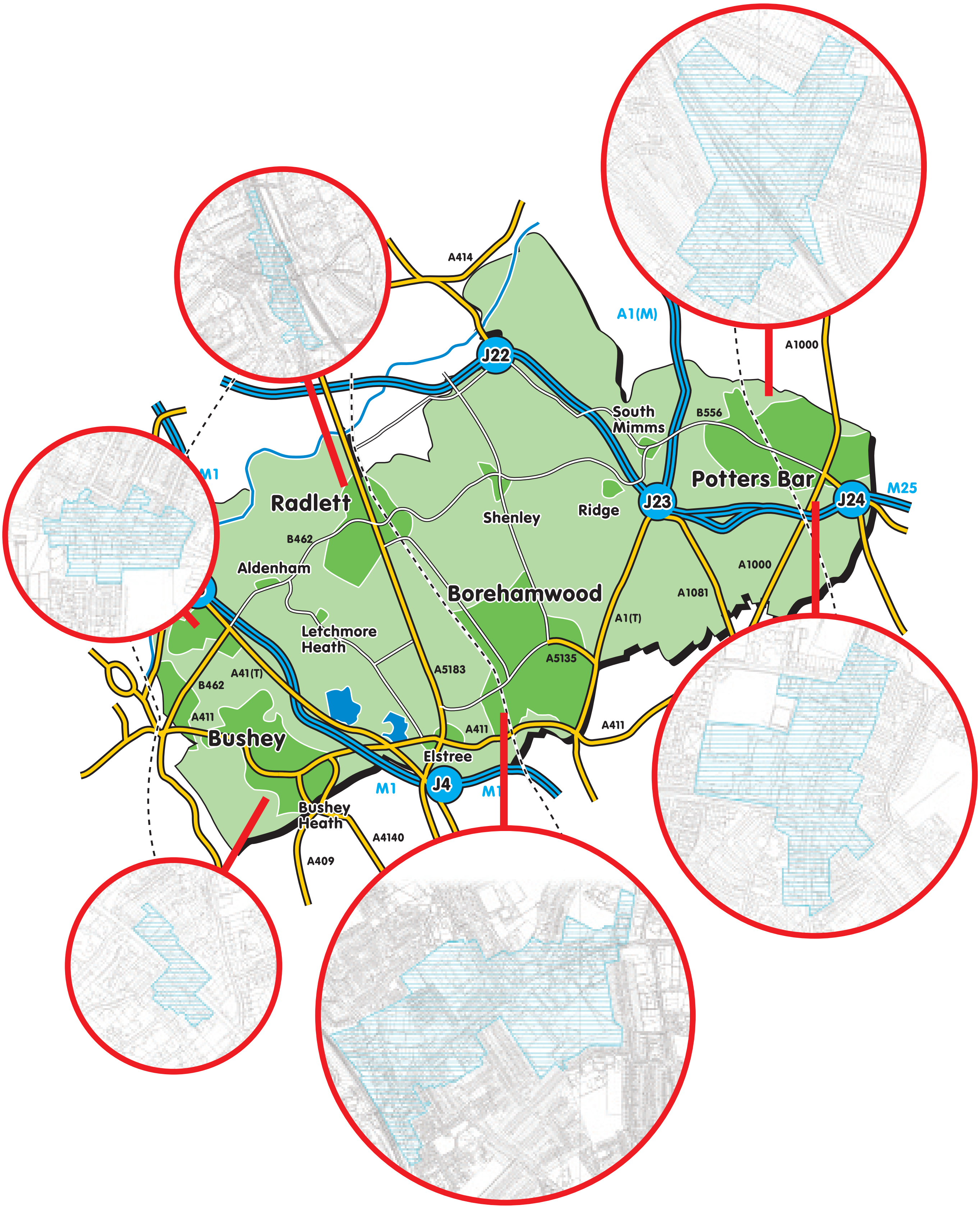
Examples of Convenience shops (PPS6, 2006)

Grocers, bakers, butchers, supermarkets, chemists, newsagents, off-licence, florist, pet shops, cosmetics and toiletries.

Examples of Comparison shops (PPS6, 2006)

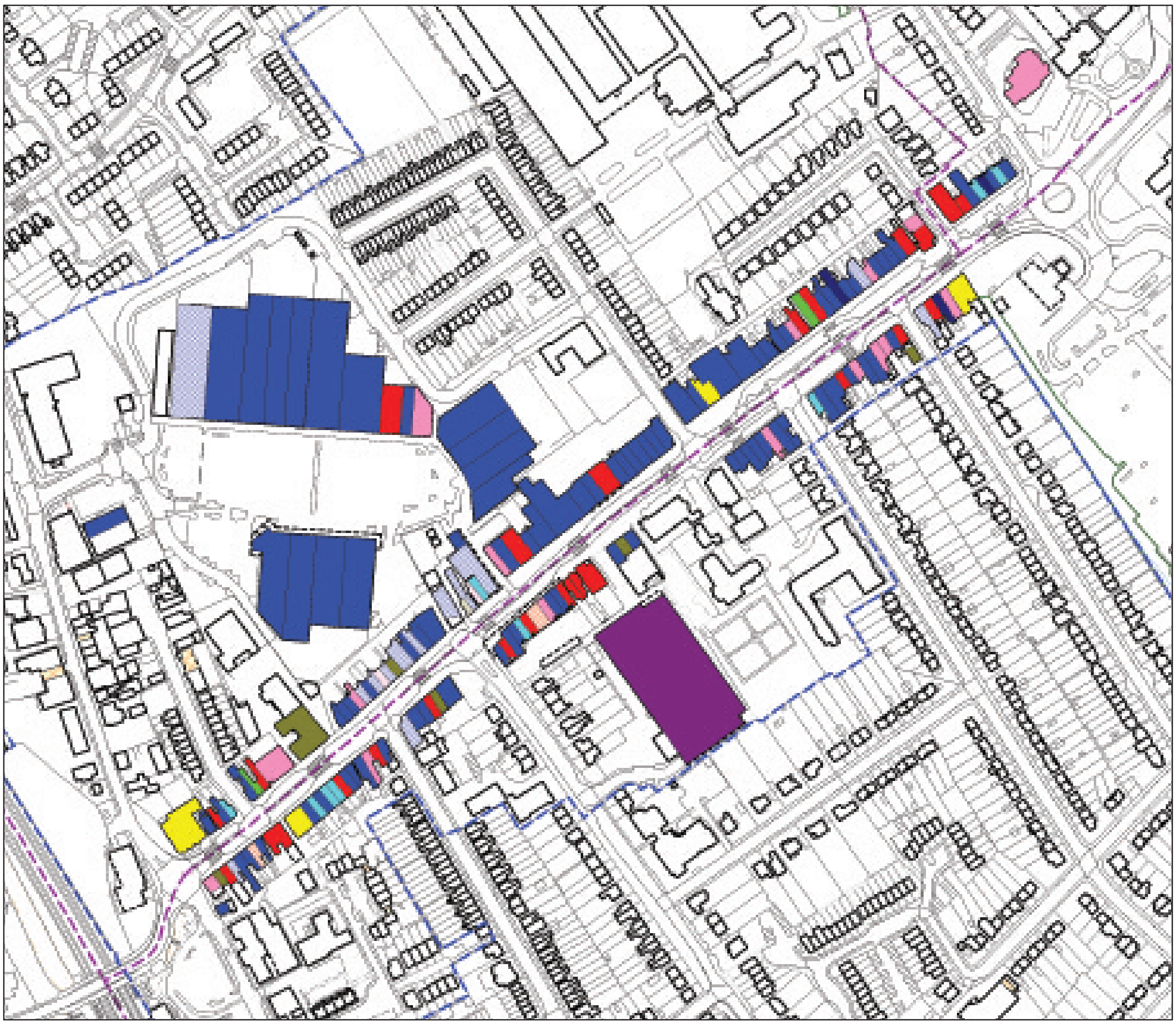
Clothing, footwear, electrical (white) goods, furniture, house repair and decorations, glassware, tableware, kitchen utensils, books, maps, gifts, cards, jewellery, watches, bicycles, tools and equipment for the house and garden, dry cleaners and charity shops.

Appendix J - Town centre extent maps



Appendix K - Maps showing the nature of retail units in the borough (based on June 2008 Retail Survey)

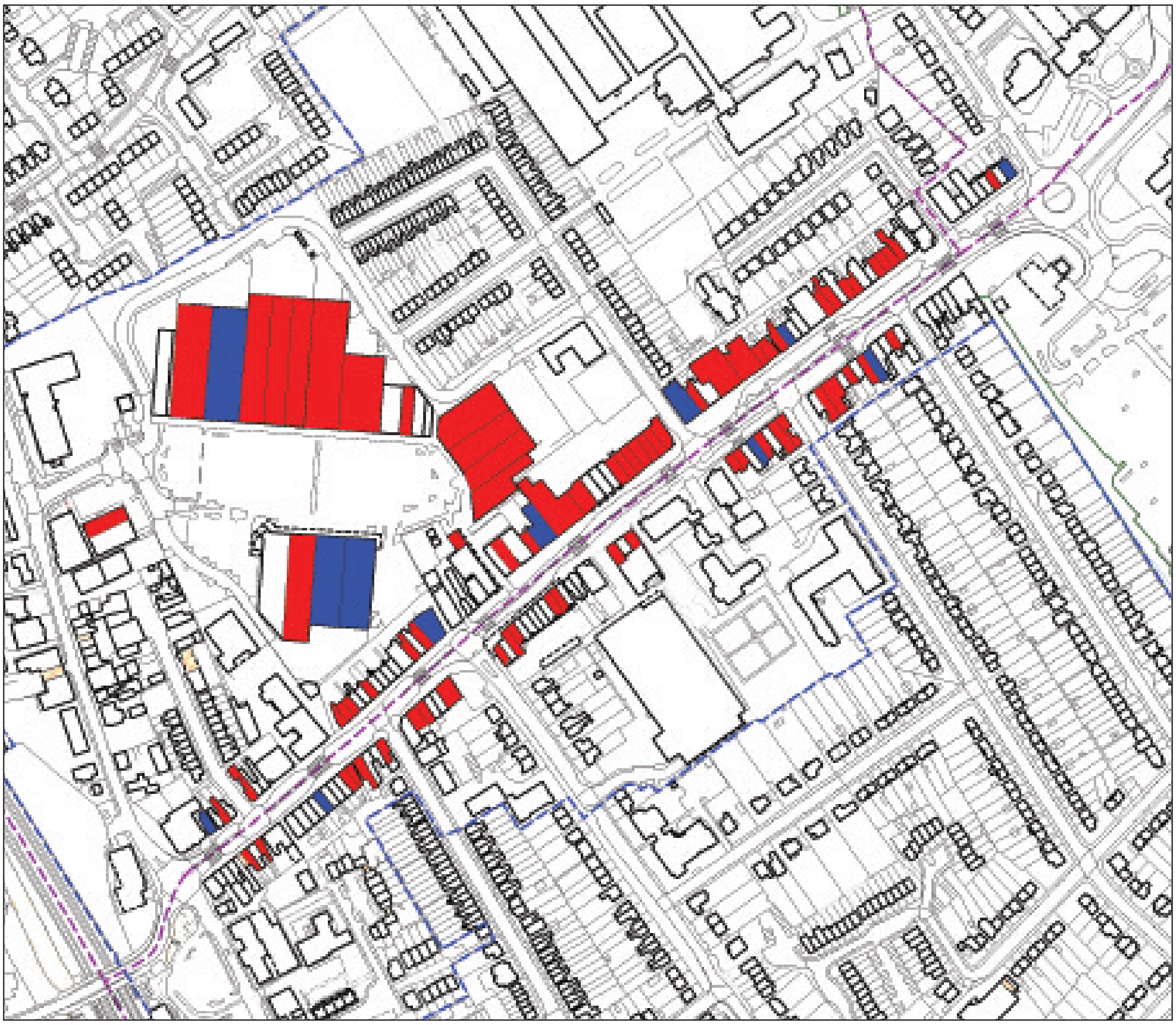
Map K1 - Borehamwood use classes



Key

- A1 Shops
- A1/A3 Shops with an element of A3 use
- A2 Financial and professional services
- A3 Restaurants and cafes
- A4 Drinking establishments
- A5 Hot food takeaways
- B1 Buisiness light industry
- B1 (A) Business offices
- D1 Non-residential institutions
- D2 Assembly and leisure
- SG Sui generis
- Vacant A1 units
- Vacant A2 units
- Vacant A3 units
- Vacant sui generis

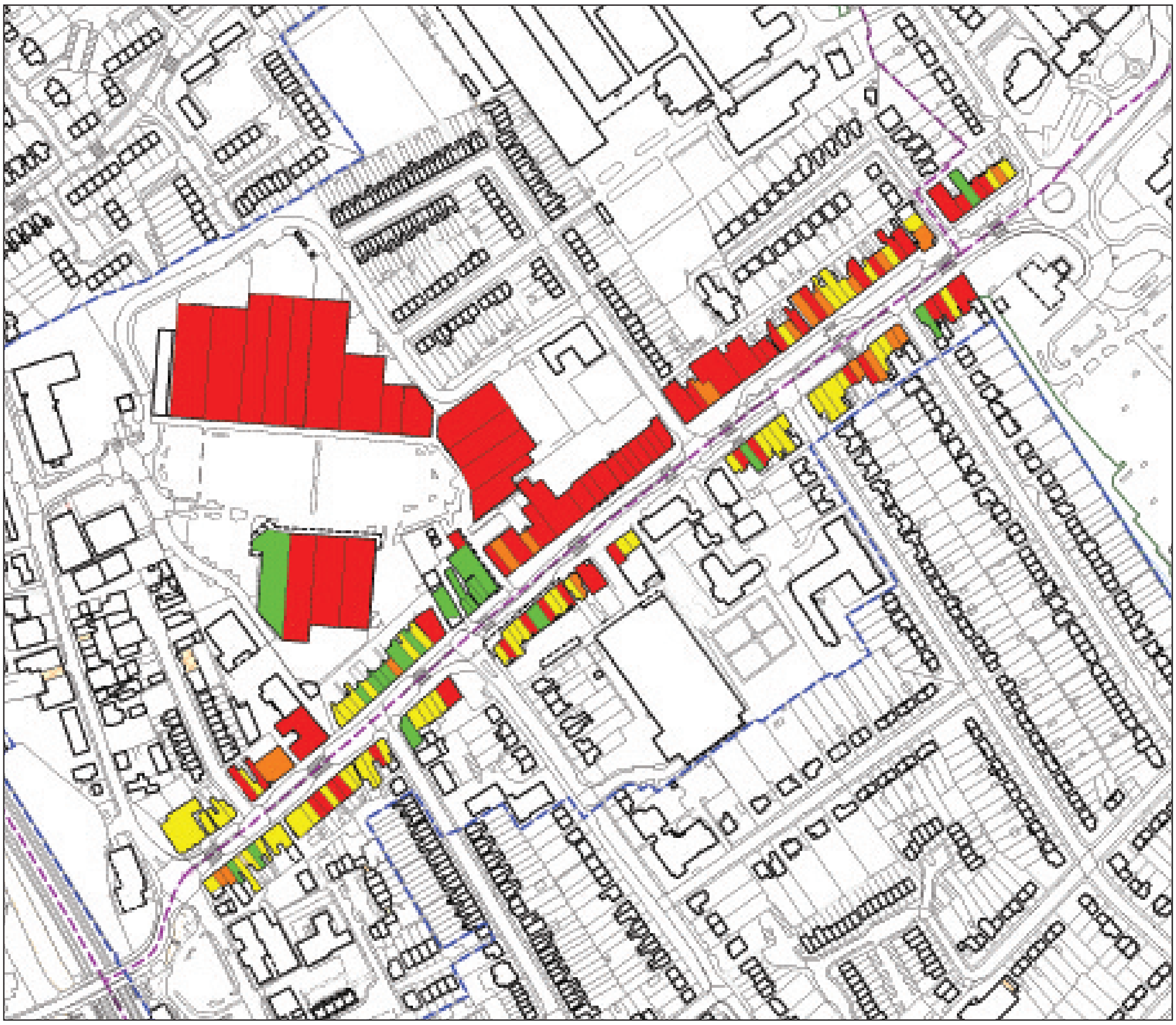
Map K2 - Borehamwood Comparison and convenience units



Key

Comparison Units
Convenience Units
Non-A1 Units

Map K3 - Borehamwood - National and local units



Key

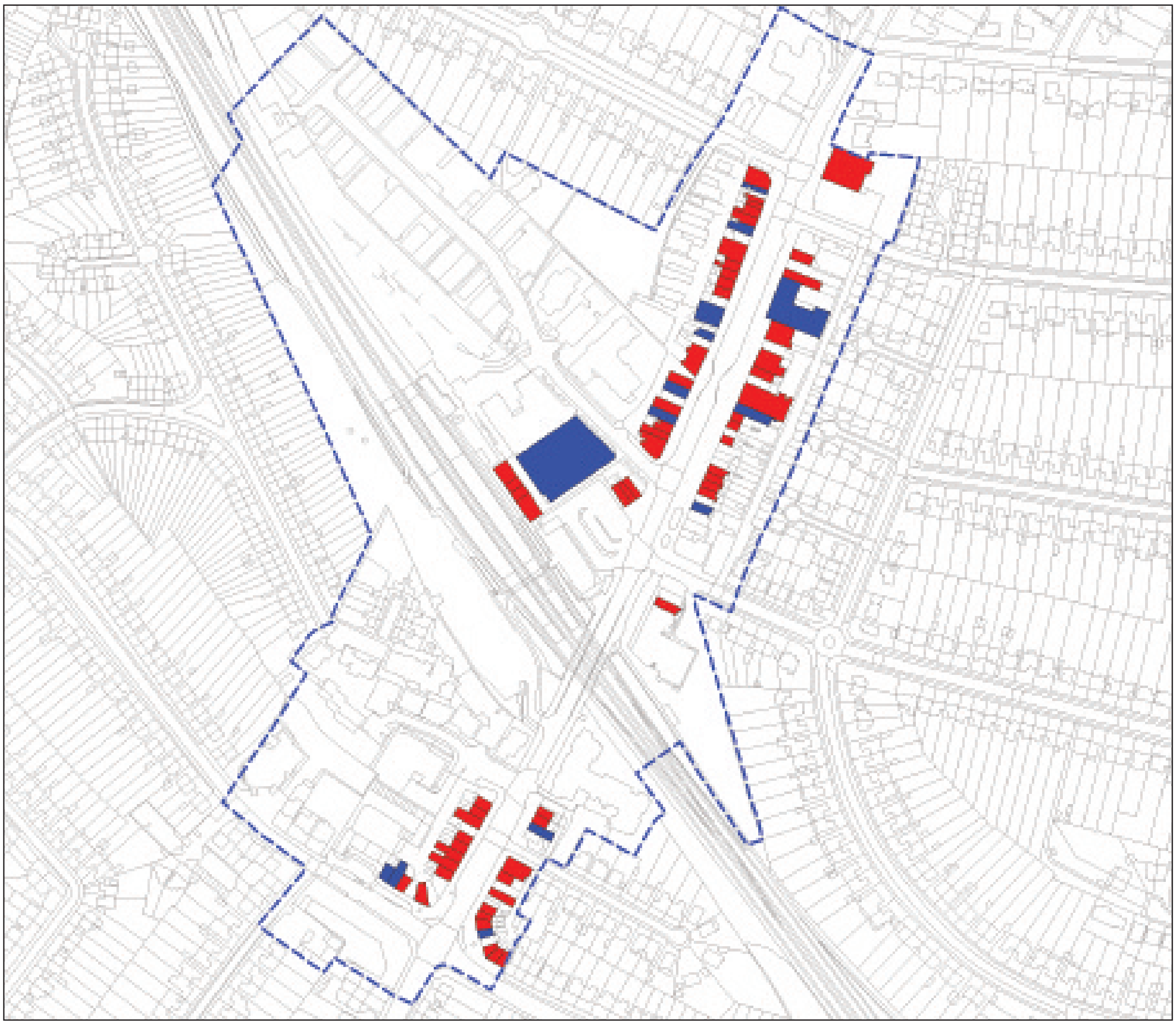
- National
- Local Chain
- Local Only
- Vacant

Map K4 - Potters Bar Darkes Lane - use classes

Key

- A1 Shops
- A1/A3 Shops with an element of A3 use
- A2 Financial and professional services
- A3 Restaurants and cafes
- A4 Drinking establishments
- A5 Hot food takeaways
- B1 Buisiness light industry
- B1 (A) Business offices
- D1 Non-residential institutions
- D2 Assembly and leisure
- SG Sui generis
- Vacant A1 units
- Vacant A2 units
- Vacant A3 units
- Vacant sui generis

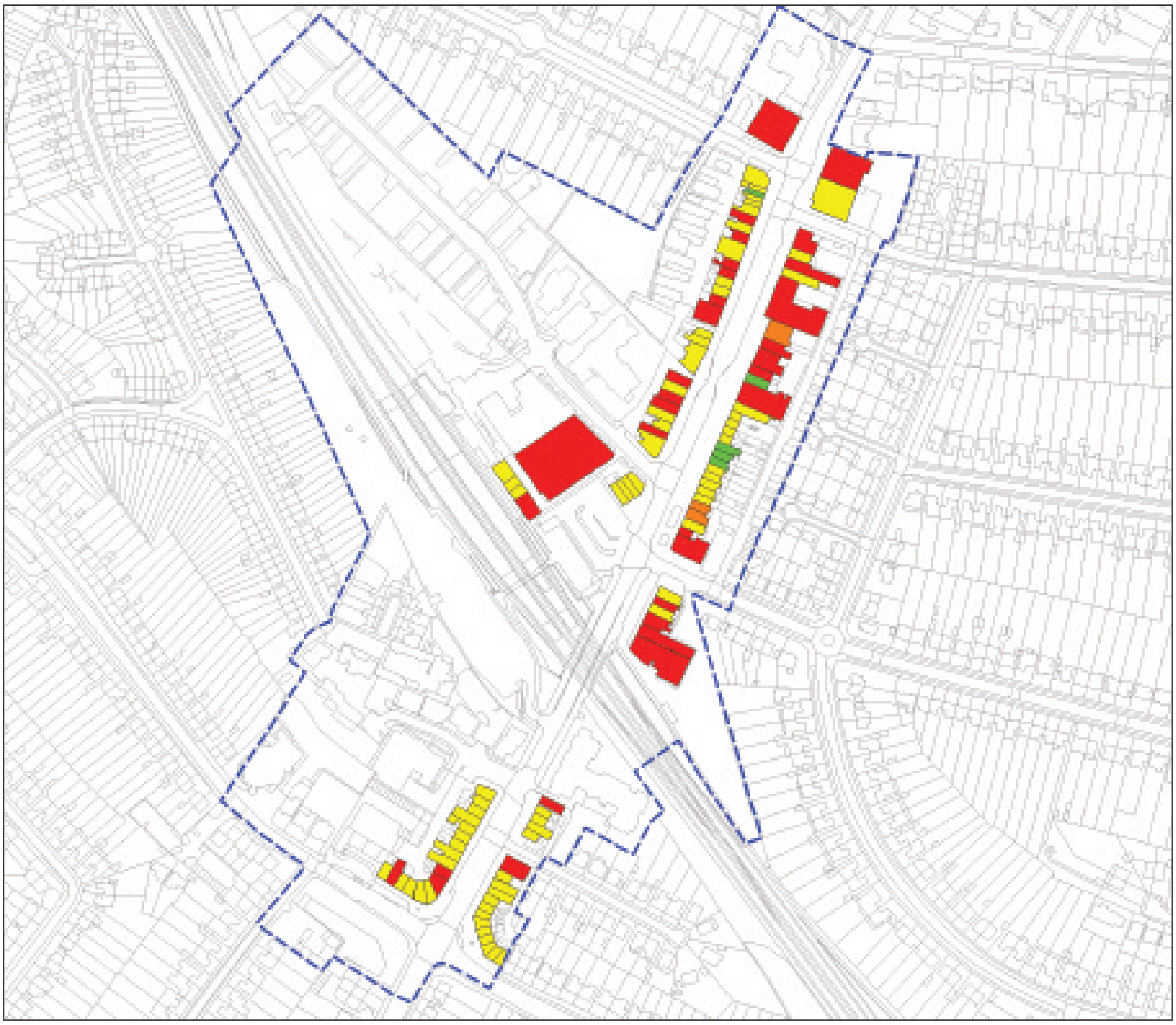
Map K5 - Potters Bar Darkes Lane - Comparison and convenience units



Key

Comparison Units
Convenience Units
Non-A1 Units

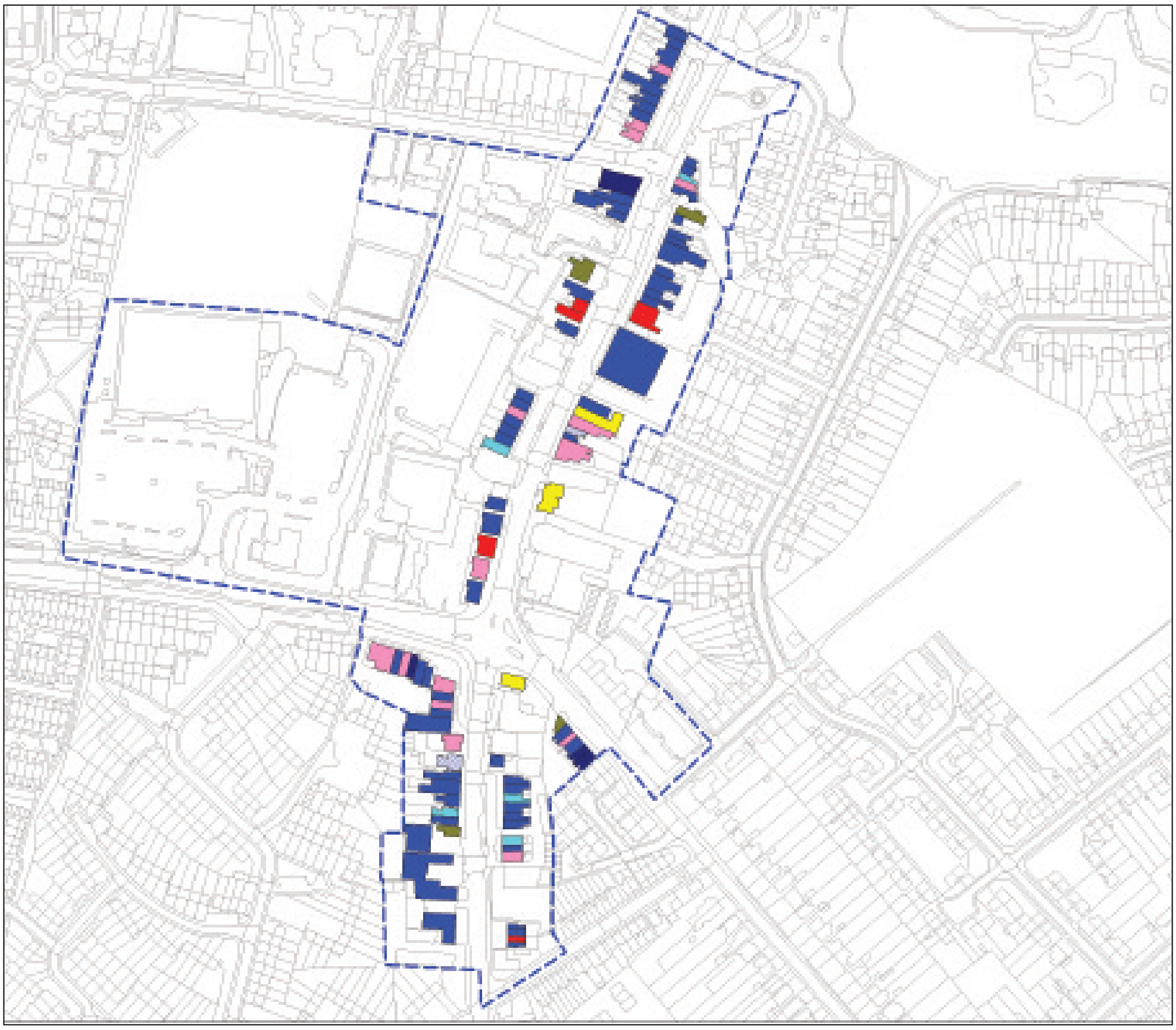
Map K6 - Potters Bar Darkes Lane - National and local units



Key

- National
- Local Chain
- Local Only
- Vacant

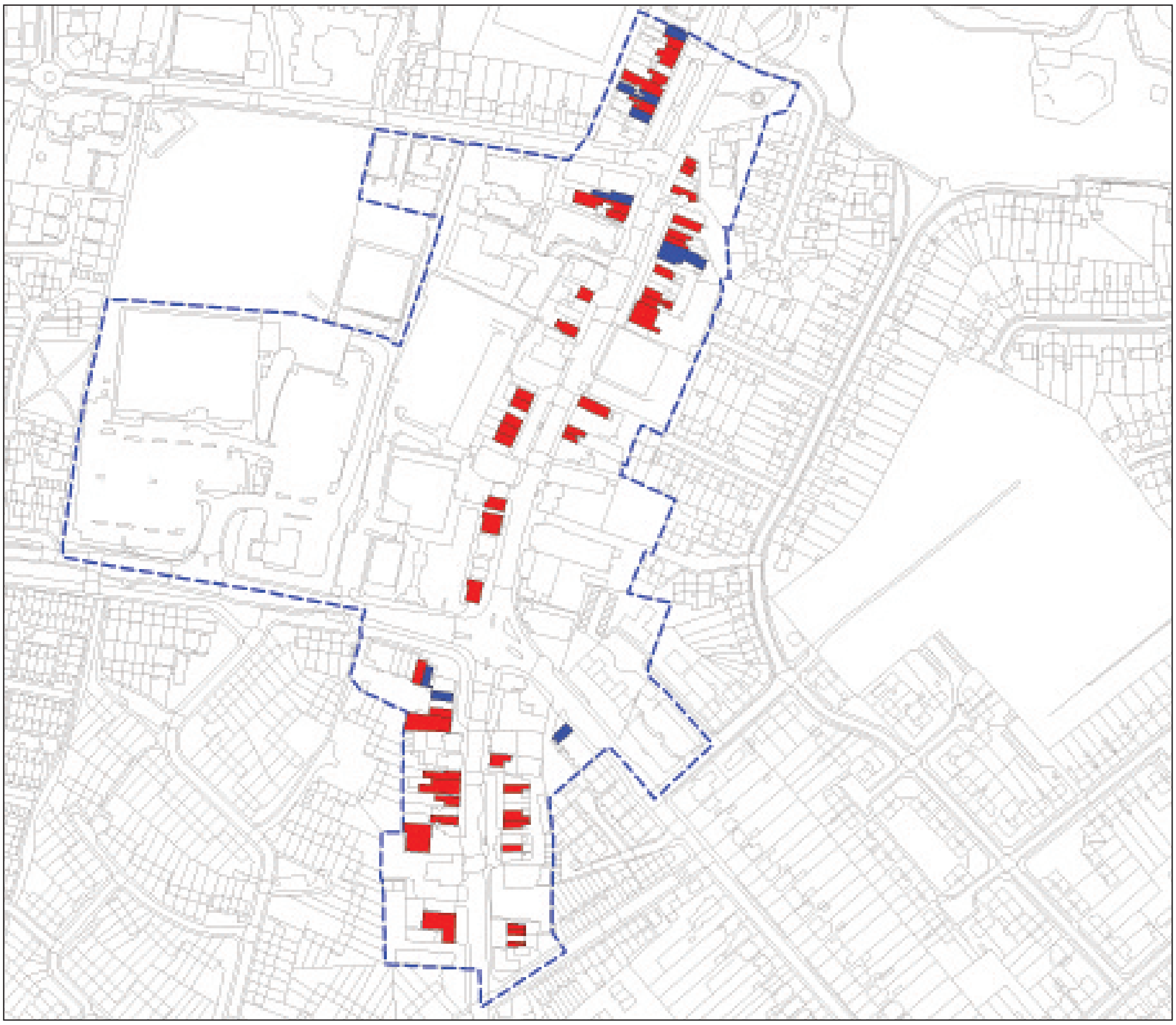
Map K7 - Potters Bar High Street - Use class



Key

- A1 Shops
- A1/A3 Shops with an element of A3 use
- A2 Financial and professional services
- A3 Restaurants and cafes
- A4 Drinking establishments
- A5 Hot food takeaways
- B1 Buisiness light industry
- B1 (A) Business offices
- D1 Non-residential institutions
- D2 Assembly and leisure
- SG Sui generis
- Vacant A1 units
- Vacant A2 units
- Vacant A3 units
- Vacant sui generis

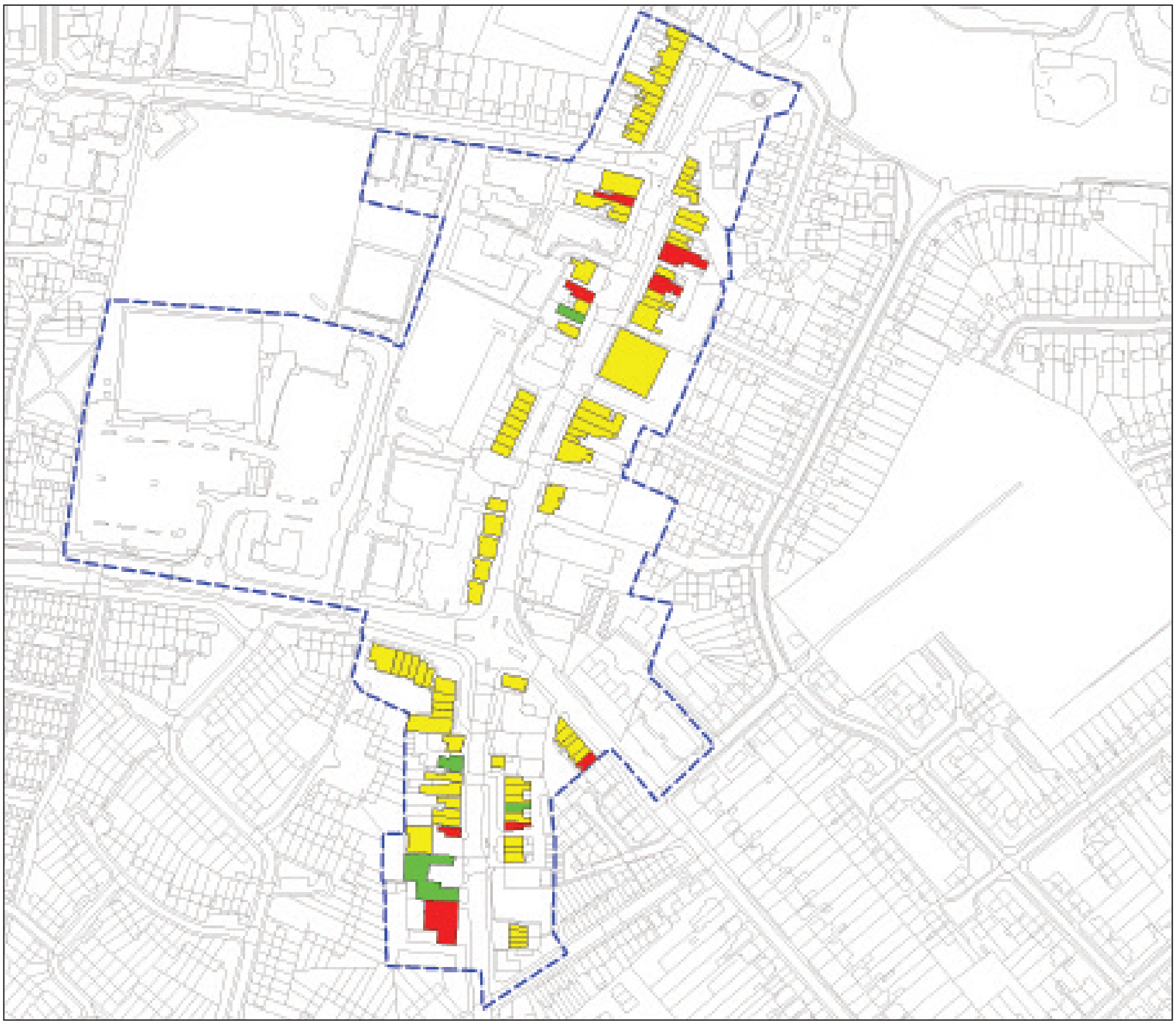
Map K8 - Potters Bar High Street - Comparison and convenience units



Key

- Comparison Units
- Convenience Units
- Non-A1 Units

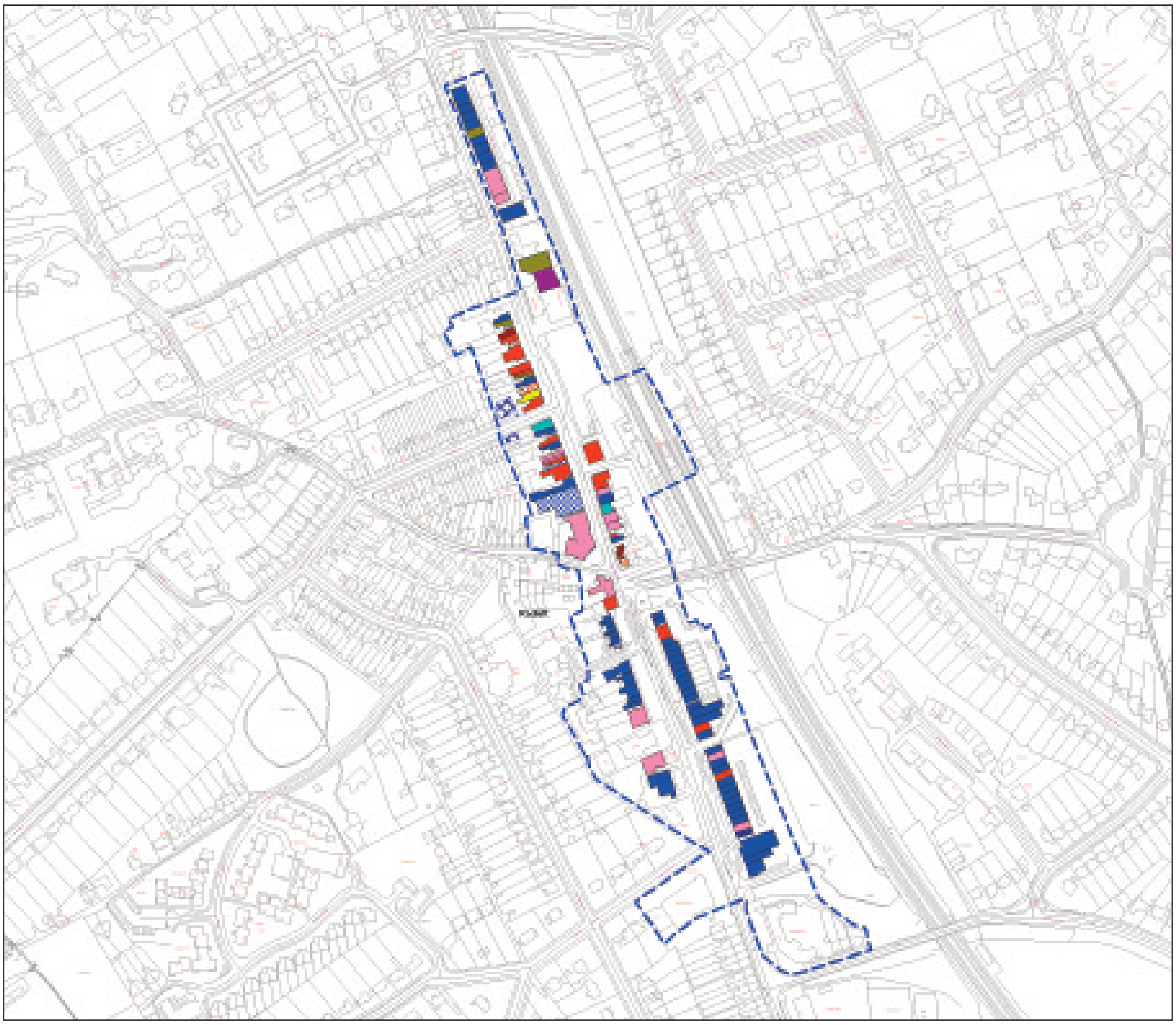
Map K9 - Potters Bar High Street - National and local units



Key

- National
- Local Chain
- Local Only
- Vacant

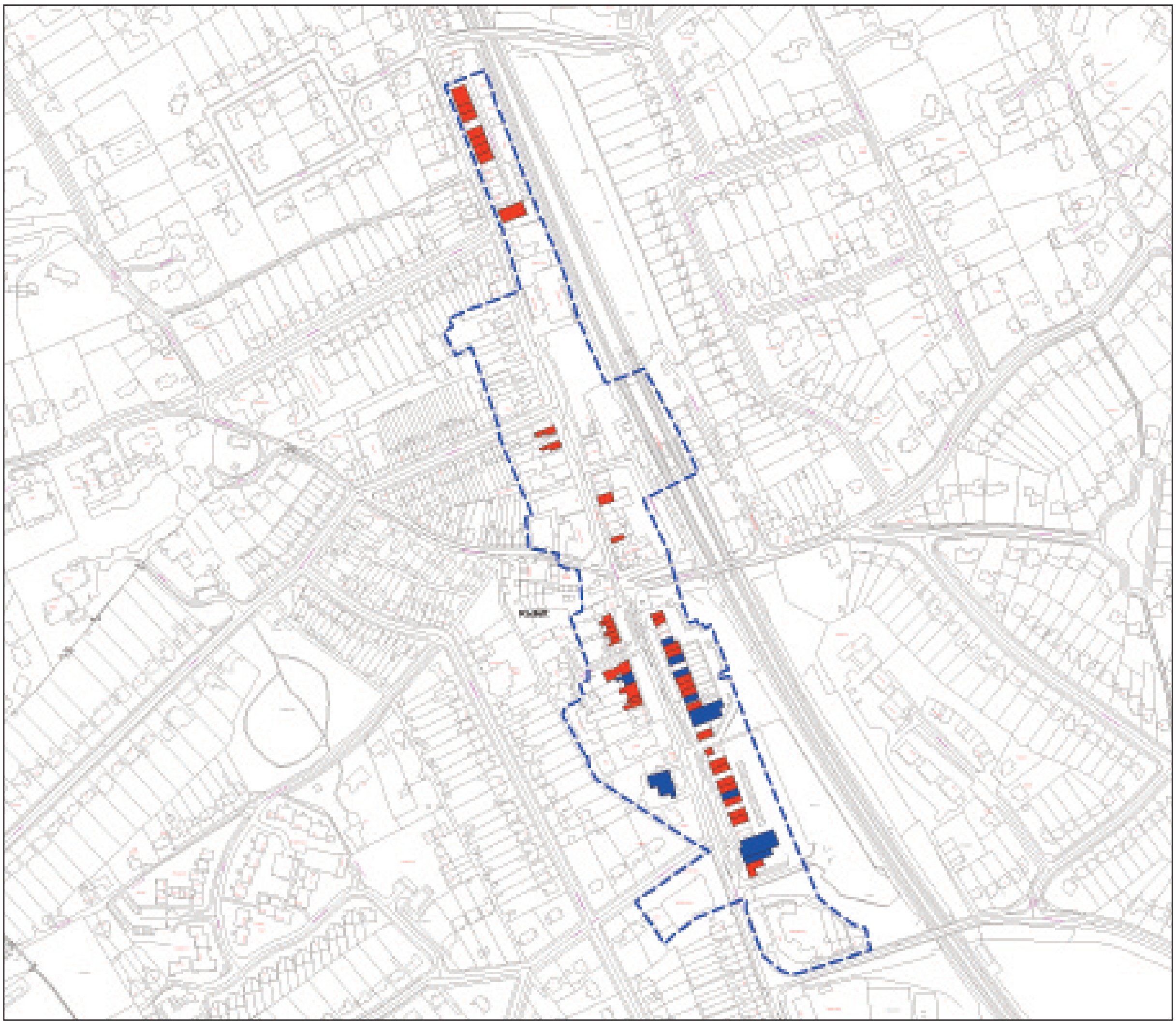
Map K10 - Radlett - Use class



Key

- A1 Shops
- A1/A3 Shops with an element of A3 use
- A2 Financial and professional services
- A3 Restaurants and cafes
- A4 Drinking establishments
- A5 Hot food takeaways
- B1 Buisiness light industry
- B1 (A) Business offices
- D1 Non-residential institutions
- D2 Assembly and leisure
- SG Sui generis
- Vacant A1 units
- Vacant A2 units
- Vacant A3 units
- Vacant sui generis

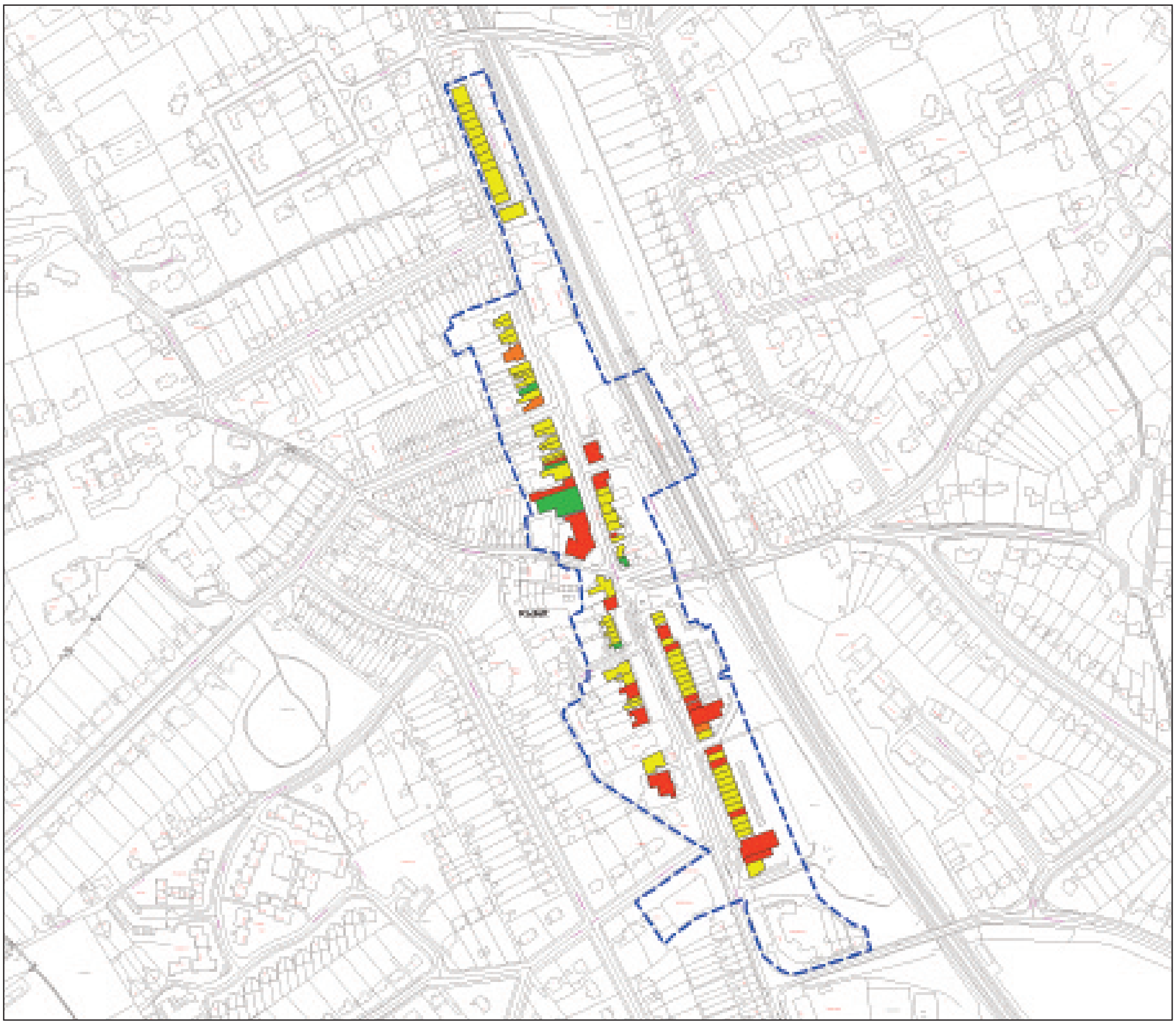
Map K11 - Radlett - Comparison and convenience units



Key

- Comparison Units
- Convenience Units
- Non-A1 Units

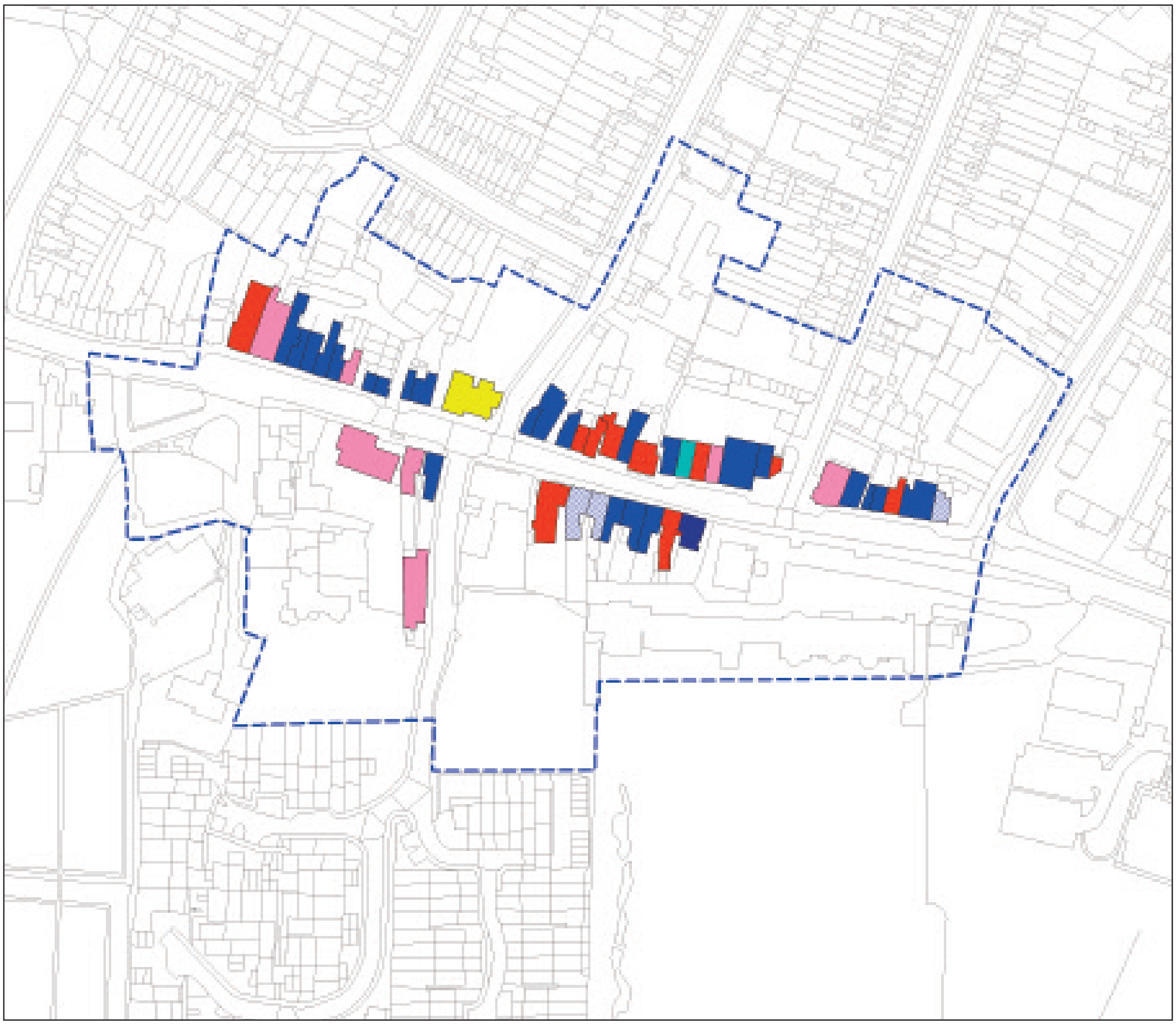
Map K12 - Radlett - National and local units



Key

- National
- Local Chain
- Local Only
- Vacant

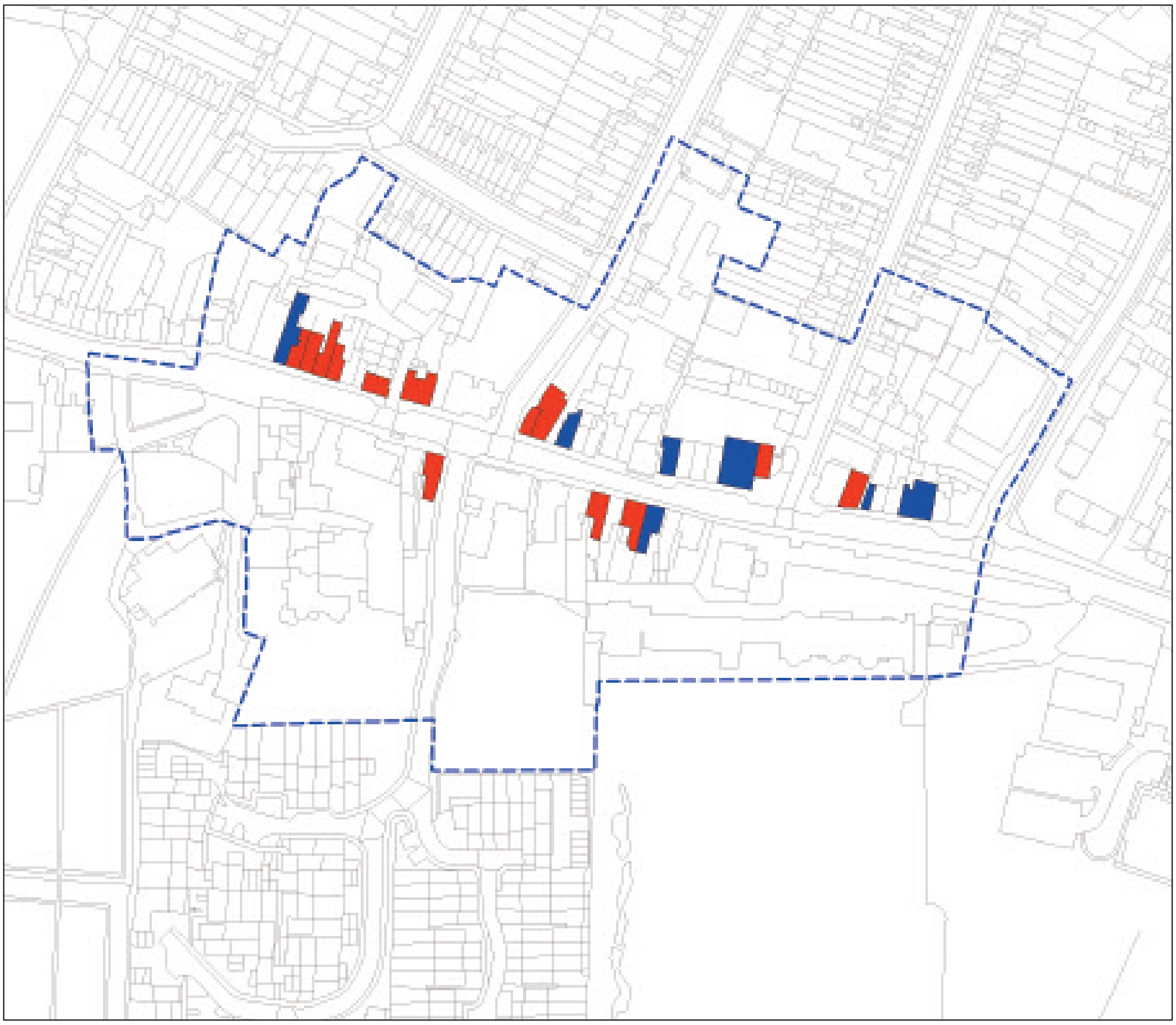
Map K13 - Bushey - Use class



Key

- A1 Shops
- A1/A3 Shops with an element of A3 use
- A2 Financial and professional services
- A3 Restaurants and cafes
- A4 Drinking establishments
- A5 Hot food takeaways
- B1 Buisiness light industry
- B1 (A) Business offices
- D1 Non-residential institutions
- D2 Assembly and leisure
- SG Sui generis
- Vacant A1 units
- Vacant A2 units
- Vacant A3 units
- Vacant sui generis

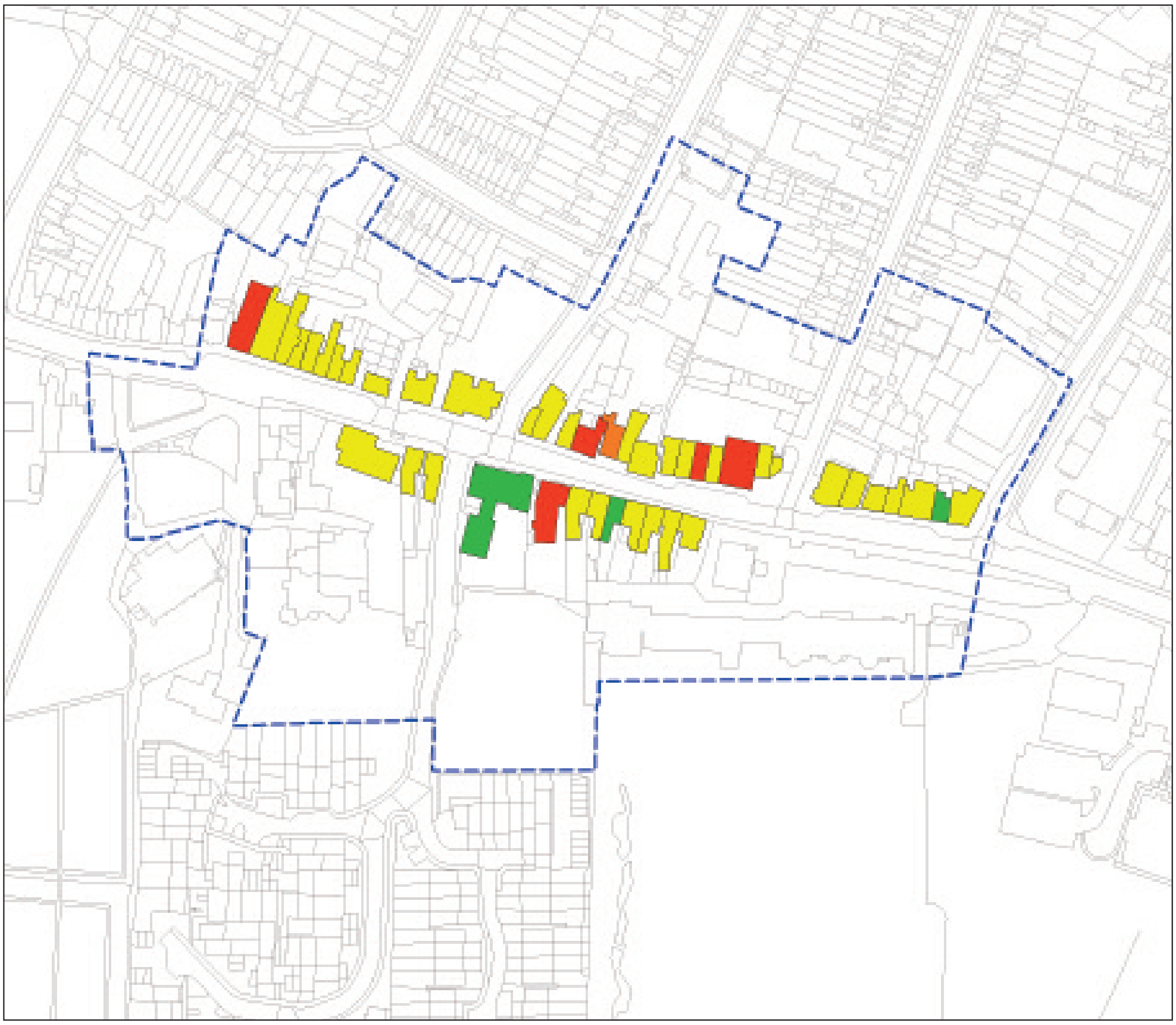
Map K14 - Bushey - Comparison and convenience units



Key

- Comparison Units
- Convenience Units
- Non-A1 Units

Map K15 - Bushey - National and local units



Key

- National
- Local Chain
- Local Only
- Vacant

Map K16 - Bushey Heath - Use class

Key

- A1 Shops
- A1/A3 Shops with an element of A3 use
- A2 Financial and professional services
- A3 Restaurants and cafes
- A4 Drinking establishments
- A5 Hot food takeaways
- B1 Buisiness light industry
- B1 (A) Business offices
- D1 Non-residential institutions
- D2 Assembly and leisure
- SG Sui generis
- Vacant A1 units
- Vacant A2 units
- Vacant A3 units
- Vacant sui generis

Map K17 - Bushey Heath - Comparison and convenience units

Key

- Comparison Units
- Convenience Units
- Non-A1 Units

Map K6 - Bushey Heath - National and local units

Key

- National
- Local Chain
- Local Only
- Vacant