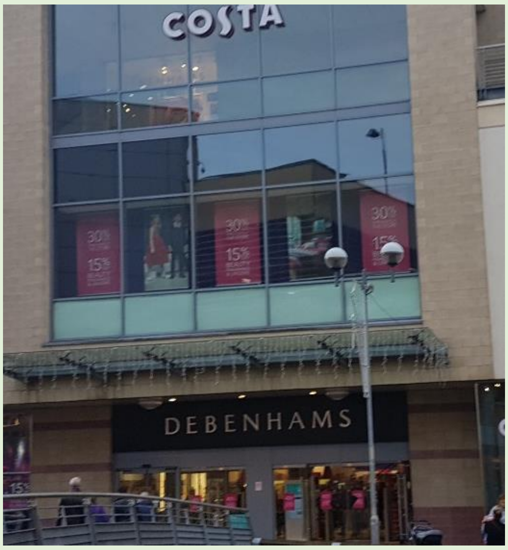
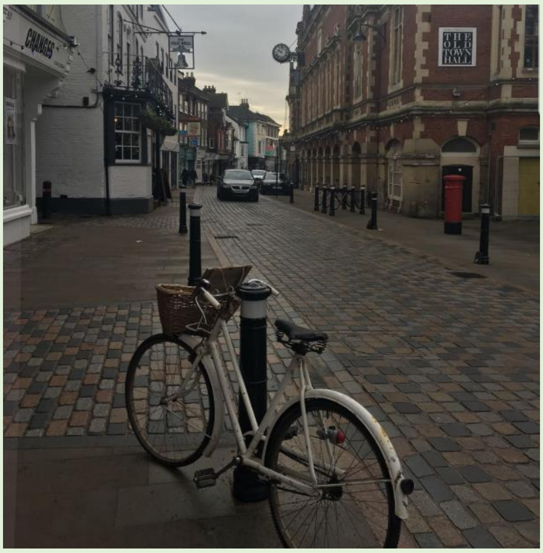
Appendix C: Health Checks

Hemel Hempstead (New Town and Old Town)
Dacorum Borough Council

Description	Hemel Hempstead is identified as a minor sub regional centre and is the main centre serving Dacorum Borough Council. The centre is located south of Luton and west of St Albans. Hemel Hempstead Old Town is located north of the new town along the High Street.
Current Status	Principal Town Centre





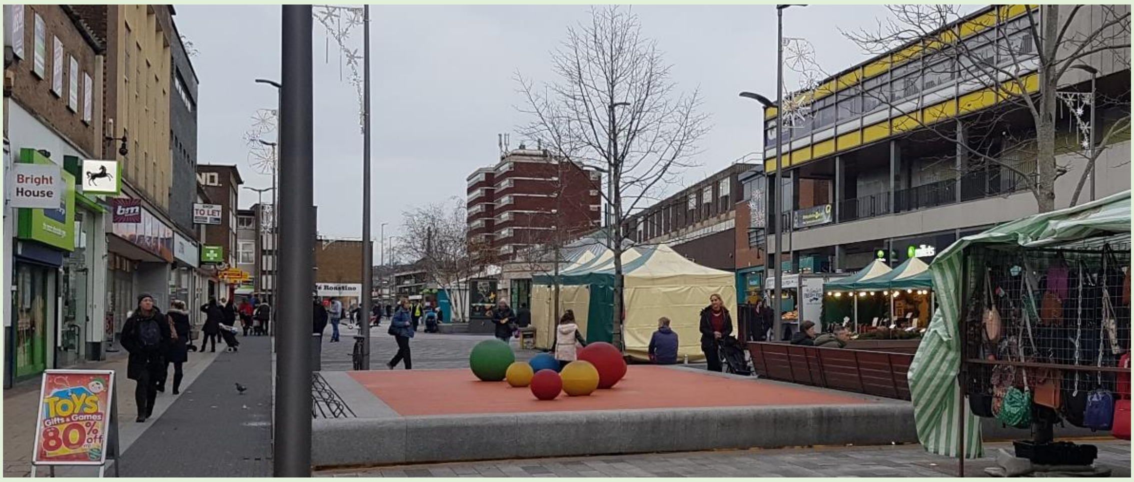


Table C.1 Town Centre Composition

Hemel Hempstead	Units (%) 2003	Units (%) 2008	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	5.0	5.0	6.1	8.8	9.8	15.2
Comparison	47.0	54.0	33.0	31.0	49.7	34.9
Retail Services	44.0*	*32.0	14.0	14.5	5.7	6.8
Leisure Services	*	*	22.3	23.9	14.6	25.0
Financial and Business Services	*	*	14.2	10.3	10.2	7.7
Vacant	3.0	9.0	10.3	11.2	10.1	9.8
TOTAL	100	100	100	100	100	100

**Figure represents all services (retail services, leisure services and financial and business services)*
Source: 2004 figures from Dacorum Retail and Leisure Study January 2006, 2008 figures from Dacorum Retail Study update 2009 and 2017 figures are from Experian Goad Category Report 2017

Overall Composition	At the time of the Nexus site visits there were 358 units within Hemel Hempstead Town Centre (including Hemel Old Town). The health check assessments are based on Experian Goad Plans which include Hemel Hempstead and Hemel Old Town on two separate plans. However, as both Hemel Hempstead and Hemel Old Town are located within the town centre boundary, for the purpose of this health check they are considered together. For this reason, there may be discrepancies in the number of town centre units from previous studies. The Town Centre Boundary for Hemel Hempstead, as shown within Dacorum Borough Council's Policies Map, extends from St Albans Road to the south to Fletcher Way just north of Old Hemel Hempstead. Primary shopping frontages are located to the south of the centre along the pedestrianised area of Marlowes and within the two purpose built shopping centres, the fully enclosed Marlowes Shopping Centre (1990) and the Riverside Centre (2005). Secondary Frontage is located mainly in Marlowes (north of the pedestrianised area), Bridge Street, Market Square and Waterhouse Street. As outlined in Figure 4.5 of Chapter 4, the total retail floorspace for Hemel

	Hempstead is 80,230, the second highest of the Study Area after Watford.
Convenience & Comparison Goods	At 6.1%, convenience representation within the town centre is below the UK average of 8.8%. Asda, the town centres anchor convenience store, is located to the north of the new town (3,660 sq m). Iceland and Marks and Spencer food hall also provide a fairly substantial convenience offer within the town centre. The underrepresentation of convenience stores in Hemel Hempstead Town Centre reflects the strong presence of out of centre food stores including Sainsbury's at London Road and Tesco at Jarman Park Retail Park. The NEMS Household Survey highlighted that the majority of respondents (33.4%) residing in Zone 11 (the zone Hemel Hempstead is located within) undertook their last main food shop at Tesco Superstore, outside of the town centre. In comparison, 7.4% of respondents carried out their last main shop at Asda, the town centre's anchor store. At 33.0%, comparison representation is marginally above the UK average of 31.0%. Representation has declined from 54.0% since 2008, which is likely to be reflective of the impending Marlowes Centre refurbishment. There are a significant number of national multiples located within the town centre. Anchor comparison stores include Debenhams, Marks and Spencer and Primark. Other multiple retailers include Next, Topshop, Boots, WH Smith, TK Maxx, River Island and New Look all of which provide a draw to the town centre. Higher quality retailers are located at the Riverside Centre and the south of the Marlowes with lower retailer quality along the Marlowes. It is intended that the retail offer in this location will be enhanced through the refurbishment of the Marlowes Centre. Convenience and comparison stores in Hemel Old Town are wholly made up of independent units, predominantly boutique style stores. Hemel Hempstead has a total of 14 charity shops the majority of which are located along the Marlowes. There are no charity shops located in Hemel Old Town.
Services	Retail service representation (14.0%) is currently in line with the UK average of 14.5%. Representation of leisure services (22.3%) is below the UK average of 23.9%. Currently there is a stronger leisure offer in Hemel Old Town which offers a range of restaurants and popular public houses. In comparison, the leisure offer at Hemel Hempstead New Town consists mainly of takeaways and cafes reflecting the limited night time economy. This is reflected in the NEMS Household Survey results where

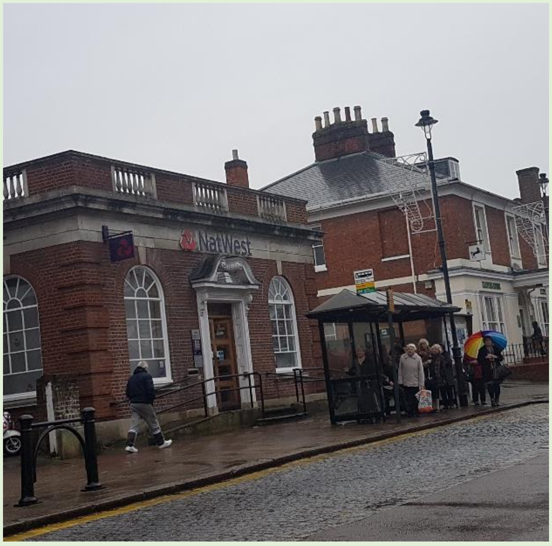
	13% of respondents who visit Hemel Hempstead the most would like to see more restaurants over any other leisure facility. Overall, there is a strong representation of financial and business services within the centre. This is predominantly due to the strong offer in Hemel Old Town where 24.5% of units are financial or professional services compared to 10.6% in the New Town. The strong representation of services in the Old Town Centre reflects its secondary retail offer and complements the New Town which is dominated by comparison good stores. In terms of the evening economy, 24 of all 263 units within Hemel Hempstead Town Centre (New Town) are restaurants, takeaways, pubs, or bars, equating to 9.1% of all units. There is a much stronger evening economy in Hemel Old Town where there are 18 restaurants, takeaways, pubs or bars equating to 19.0% of overall representation.
Vacancies	The representation of vacant units (10.3%) is currently below the UK average of 11.2%. Representation of vacant units is consistent in both the Old Town (10.6%) and New Town (10.2%). Vacancies in the New Town are mainly within the Marlowes Centre and along the Primary Shopping Frontage reflecting the impending refurbishment of this area. A few vacancies are also still evident at the Riverside Centre. It is understood that two of these units have never been occupied.
Rents	From reviewing available online sources, retail rents vary quite considerable throughout the centre. Retail units within the Marlowes shopping centre have average rents of £14.00 psf. However, rents further north of the town centre and along Waterhouse Street reach up to circa £30.00 psf. Low rents within the Marlowes are likely to reflect the shopping centre refurbishment and the number of temporary leases currently available. Rents are also particularly low at the Market Square (as low as £20.00 psf), reflecting the undesirability of this location. Rents at the Riverside Centre are shown to be slightly higher than at the Marlowes centre, at around £20.00 psf. **Source:** http://www.shopproperty.co.uk/shops/Hemel%20Hempstead
Pedestrian Flows	At the time of the Nexus site visits, the highest pedestrian flows were witnessed along the pedestrianised Primary Shopping Area along the Marlowes. Pedestrian flows were lower to the north of the Marlowes where the New Town joins the Old Town. This reflects the linear nature of the Town Centre which feels disjointed in parts. A fair amount of activity was also witnessed around the Riverside Centre.

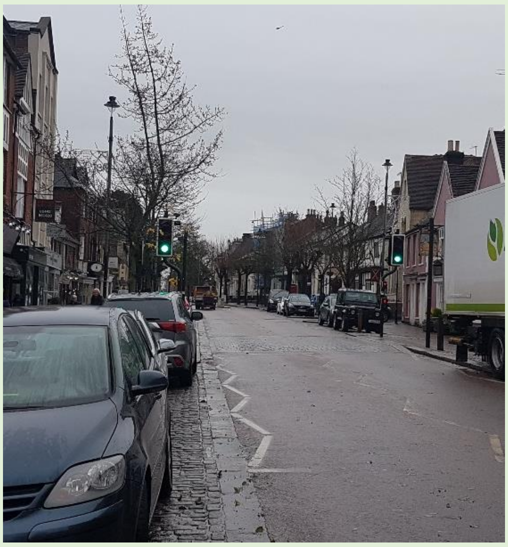
	Lower levels of activity were witnessed around Market Square. Although low levels of activity were evident at the Old Town during the day, the high presence of restaurants means there is a fair amount of activity into the night.
Accessibility	The town centre is easily accessible via car and is located approximately 4km from Junction 8 of the M1 and 5 km from Junction 20 of the M25. The town centre has a total of six car parks (both short stay and long stay) within close proximity to the town centre. At the time of the Nexus site visits there was limited capacity in the majority of the car parks. Unsurprisingly, the NEMS Household Survey results indicated that the majority of respondents who visited Hemel Hempstead travelled by car (68.8%), whereas only 13.3% tend to walk. At the time of the Nexus site visits there was a fair amount of traffic on roads through and surrounding the centre. This could potentially deter pedestrians from walking outside of the main pedestrianised Primary Shopping Area of the Marlowes, the Marlowes Centre and the Riverside Centre. The following car parks are located in Hemel Hempstead Town Centre; • Hillfield Road – 300 spaces (paid parking) • Marlowes Shopping Centre - 1,200 spaces (paid parking) • Riverside Shopping Centre – 369 spaces (paid parking) • Moor End Road – 72 spaces (paid parking) • Water Gardens South - 112 spaces (paid parking) • Water Gardens North – 292 spaces (paid parking) Hemel Hempstead Old Town is served by Alexandra Road Car Park – 16 spaces (paid parking), The Gables Car Park – 19 spaces (paid parking) and High Street Car Park – 80 spaces (paid parking). The Old Town is served by on street parking and has a much more pedestrian friendly environment. Hemel Hempstead train station is located to the south west of the town centre and is accessed from the A4251. Although the station is disconnected from the town centre, regular bus services run into the main shopping area. Particularly good automated bus signage was noted along the Marlowes.
Perception of Safety	At the time of the Nexus site visits, the centre had a safe ambiance and CCTV was evident. However, an improved evening economy would lead to enhanced surveillance at night time.
Environmental Quality	Hemel Hempstead has a varied environmental quality. Whereas the south of the centre (including the Riverside Centre and primary shopping area along Marlowes) appears well maintained and pleasant with high quality street furniture, plenty of

	seating, street art and a children's play area, the quality is reduced north of the pedestrianised area. This is particularly evident at the Market Square which includes a large underutilised space that is uninviting to pedestrians. In this area and further north of Marlowes, the shopping frontages are also poorly maintained. A street market is held on the Marlowes on Thursday, Friday and Saturday and an antique market on Wednesdays which provides a further draw to the pedestrianised area of the centre. The environmental quality and atmosphere within the Marlowes Shopping Centre was notably poor and shopping frontages appear dated. At the time of the Nexus Site visits, signage was also noted to be poor. The Old Town has a historic feel and a particularly pleasant environmental quality with well-maintained shop fronts and public realm.
Stakeholder Feedback	No stakeholder responses were received for Hemel Hempstead.

Berkhamsted
Dacorum Borough Council

Description	The historic market town of Berkhamsted is the second largest settlement in Dacorum Borough and is located approximately 5 miles west of Hemel Hempstead, which it sits below in the Council's retail hierarchy. The town centre is linear in nature running from north west to south east with the main retail area focused along the High Street and Lower Kings Road.
Current Status	Secondary Town Centre





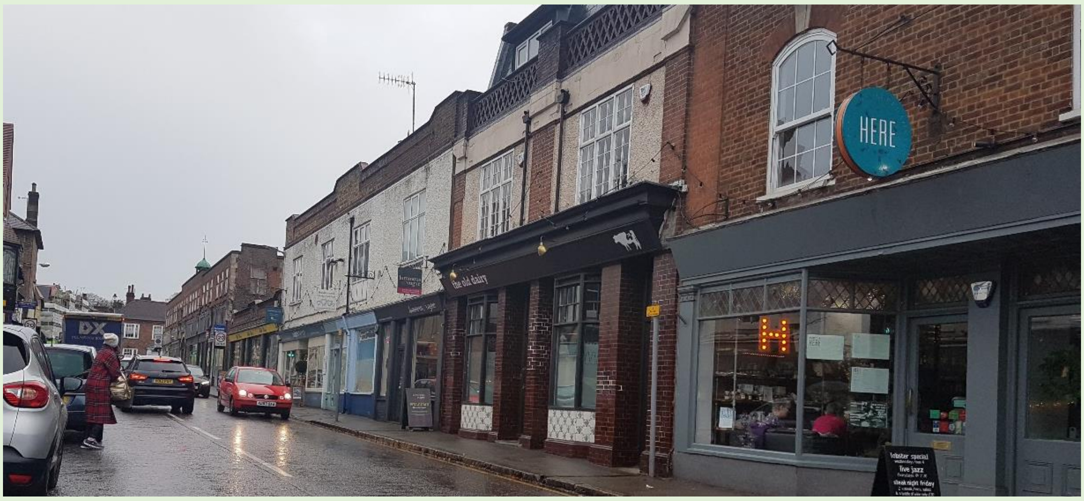


Table C.2 Town Centre Composition

Berkhamsted	Units (%) 2004	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	4.0	4.2	8.8	20.2	15.2
Comparison	35.0	34.0	31.0	29.4	34.9
Retail Services	57.0 (all services)	20.4	14.5	10.8	6.8
Leisure Services	-	24.1	23.9	26.5	25.0
Financial and Business Services	-	14.1	10.3	10.5	7.7
Vacant	3.0	3.1	11.2	2.6	9.8
TOTAL	100	100	100	100	100

**Figure represents all services (retail services, leisure services and financial and business services)*
Source: 2004 figures from Dacorum Retail and Leisure Study January 2006 and 2017 figures are from Experian Goad Category Report 2017

Overall Composition

The town centre boundary, as allocated within Dacorum Borough Council's Proposals Map, extends to the west to Kitsbury Road and just after Park Street to Victoria Road and Ravens Lane to the south east. The Experian Goad Plan for the centre does not include the parades of shops past St John's Well Lane to the north west of the town centre. However, these units, which are predominately made up of service units split up by a number of dwellings, have been included in our assessment due to their location within the town centre boundary.

The Primary Shopping Frontage currently runs along the north side of the high street from Water Lane to opposite Cowper Road. Secondary Shopping Frontages extend west of the primary frontage to St John's Well Lane and east to St Peter's Church. Secondary frontages also run on the south side of High Street from Cowper Road in the west to Chesham Road in the east and along both sides of Lower King Road.

The overall number of units in the centre has increased from 159 units in 2004 to 191 units in 2017. This is a fairly substantial increase and is likely to be attributed to changes to the Experian use class classification.

As illustrated in Table 4.5 in Chapter 4, the total retail floorspace for Berkhamsted is £29,770 sq m.

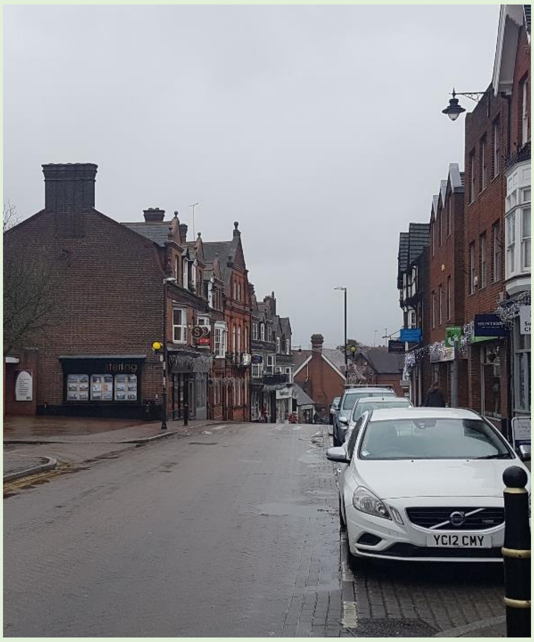
Convenience & Comparison Goods	The centre is anchored by Waitrose, Marks and Spencer Simply Food and Tesco Metro. The centre has a particularly low representation of convenience units which account for just 4.2% of the centre's overall units. This is less than half the UK average of 8.8%. However, convenience floorspace is above the UK average, owing to a small number of larger units (Waitrose, Marks and Spencer and Tesco Metro). At 3,150 sq m, Waitrose is the largest retail unit in the town centre. Waitrose is also the most popular convenience store in Berkhamsted with the NEMS Household Survey indicating that 53.9% of respondents (residing within Zone 13- Berkhamsted) undertake their main food shop at this store. The centre contains a mixture of independent stores and national multiples. Representation of comparison units is above the UK average of 31.0% but has decreased slightly from 35.0% to 34.0% since 2004. The majority of comparison units are located along the 'Primary Shopping Frontage' to the north side of the High Street. These include a number of Major Retailers including Waterstones, Boots, WH Smith, Clintons and Carphone Warehouse. The market which is held on Wednesdays and Saturdays along the Primary Shopping Frontage of the high street is a popular attraction to the town centre. In total there are 8 charity shops located within Berkhamsted Town Centre, five of which are located on the High Street and three on Lower Kings Road.
Services	The strongest service is leisure (accounting for 24.1% of all retail units) reflecting the number of restaurants and vibrant night time economy within the centre. This is highlighted in the NEMS Household Survey results where 66.4% of respondents residing in Zone 13 (the Zone Berkhamsted is located within) said they visited the town centre for their last trip to a restaurant. Similarly, 78.9% of Zone 13 respondents last visited the centre to go to a pub or bar. There are a plethora of public houses located along the High Street, contributing to the traditional feel of the centre. The Rex Cinema, located along Three Close Lane, is a popular leisure service that assists in boosting the night time economy. Representation of retail services (20.4%) and financial and business services (14.1%) are also above UK averages. There are 30 units that make up restaurants, takeaways, bars or public houses within the town centre which is 15.8% of the overall representation of units within the centre. In addition, the Rex Cinema provides an important contribution to the evening economy.
Vacancies	There are very few vacancies in the town centre. At 3.1%, this is well below the UK average of 11.2%.

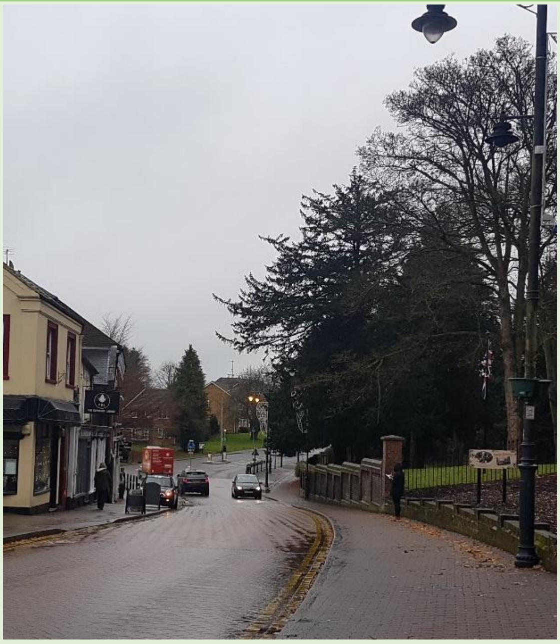
Rents	From reviewing available online sources and notwithstanding the attraction of specific locations across the town centre due to the close proximity to certain facilities, the average rent for retail facilities in Berkhamsted is circa £50.00 psf. **Source:** http://www.shopproperty.co.uk/shops/Berkhamsted
Pedestrian Flows	At the time of the Nexus site visits, the highest pedestrian flows were witnessed along the Primary Shopping Frontage on High Street as well as Lower King Road, which is the access to Waitrose. There was also a moderate amount of footfall to the north west of the centre up towards Marks and Spencer Simply Food. The wider pavement and seating area fronting along the section of the High Street between Lower Kings Road and Water Lane encourages pedestrians to gather in this area. The street market also encourages high footfall to this area on market days. Similarly, the seating area fronting Marks and Spencer's Simply Food, and Costa Coffee encourages activity to the north west of the High Street.
Accessibility	The town centre is accessible from Junction 20 of the M25 along the A41 which is approximately 8 miles south east of the centre. Berkhamsted Train Station is located to the north of the town centre and is accessed along Lower Kings Road where trains run to and from London approximately every 20 minutes. The centre is well served by a number of bus routes that, amongst other locations, run to Hemel Hempstead, Slough, Amersham, Watford and Aylesbury. There are a number of car parks located in the town centre including; • Water Lane Car park – 96 spaces (paid parking) • Lower Kings Road – 121 spaces (paid parking) • Canal Fields – 88 spaces (free parking) • St Johns Well Lane Short Stay – 29 spaces (paid parking) • St Johns Well Lane Long Stay – 140 spaces (free) All but one (St Johns Well Lane) are short stay. Although nearly full, there were spaces available in all of the car parks at the time of the Nexus site visits. There is very limited on street parking throughout the centre. Construction of a multi storey car park off Lower Kings Road is due to commence in 2018. At the time of the Nexus site visits, there was a fair amount of traffic travelling through the centre. Although there are a number of pedestrian crossings located to the south east of the High Street, notably there were none to the north west, making this part of the centre harder to navigate on foot.
Perception of Safety	At the time of the Nexus site visits, the centre had a safe ambiance. This is assisted by the presence of CCTV along the High Street. The active night time economy also means there is natural surveillance late into the night.

Environmental Quality	There is a particularly good environmental quality in Berkhamsted which appears to be a pleasant market town. This is highlighted in the NEMS Household Survey where 12% of respondents stated that they most liked the 'environmental quality' of Berkhamsted. At the time of the Nexus site visits, it was felt that signage could be improved throughout the centre.
Customer Views and Behaviour	The NEMS Household Survey identified that 77.0% of respondents from Zone 13 (the Zone Berkhamsted is located within) visit Berkhamsted the most. When asked what would encourage them to visit the town centre more often, the majority of respondents said 'more parking'. This perhaps reflects the lack of on street parking throughout the centre.
Stakeholder Feedback	No stakeholder responses were received for Berkhamsted.

Tring
Dacorum Borough Council

Description	Tring is a small market town located within Dacorum Borough Council. Tring Town Centre's main shopping area is focused upon High Street and Dolphin Square shopping precinct.
Current Status	Secondary Town Centre





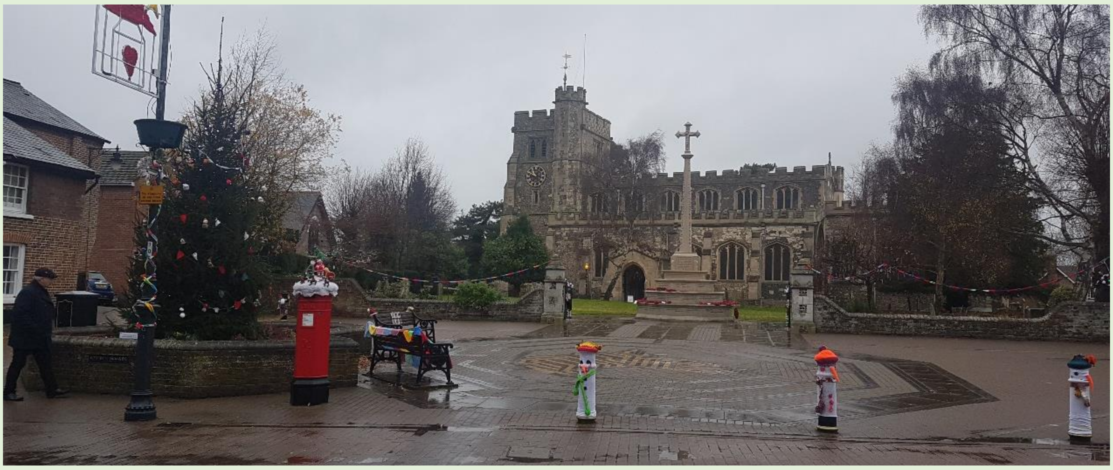


Table C.3 Town Centre Composition

Tring	Units (%) 2004	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	4.0	7.6	8.8	10.0	15.2
Comparison	25.0	27.2	31.0	26.5	34.9
Retail Services	67.0*	18.5	14.5	10.7	6.8
Leisure Services	*	30.4	23.9	28.0	25.0
Financial and Business Services	*	15.2	10.3	24.0	7.7
Vacant	3.0	1.1	11.2	0.7	9.8
TOTAL	100	100	100	100	100

**Figure represents all services (retail services, leisure services and financial and business services)*
Source: 2004 figures from the Dacorum retail study update 2006 and 2017 figures are from Experian Goad Category Report 2017

Overall Composition

At the time of the Nexus site visits, there were 92 units within the town centre which is unchanged since 2004, reflecting a stable town centre.

The town centre boundary, as identified in the Dacorum Borough Council Policies Map extends from Christchurch Road to the west to Brook Street to the east.

The Primary Shopping Frontage is located at the Dolphin Square Shopping Precinct. Secondary Shopping Frontages run along the north of the High Street from the library in the west to Forge car park in the east and along the south from the Baptist Church in the west to opposite the parish church in the east.

As illustrated in Table 4.5 in Chapter 4, the total retail floorspace for Tring is 12,590 sq m.

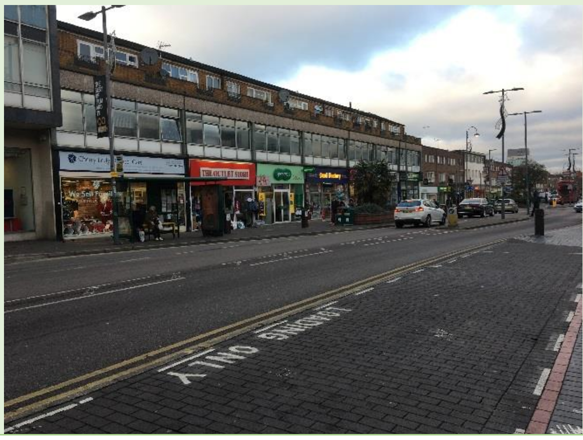
Convenience & Comparison	At 7.6%, representation of convenience units is below the UK average of 8.8%. However, the number of units has increased by 2 units since the 2004 study. Currently, Marks and Spencer's Simply Food is the largest convenience unit within the town centre (680 sq m). Lower than average convenience representation may be attributed to the presence of Tesco located just south east of the centre on London Road. As outlined in the NEMS Household Survey results, Tesco is the most popular convenience store within Zone 14 (the zone Tring is located within) with 66.5% of respondents carrying out their main food shop there. Comparison representation, both in terms of units (27.2%) and floorspace (26.5%), is below the UK averages of 31.0% and 34.9%, respectively, and predominantly made up of independent units. The NEMS Household Survey results indicated that, out of all respondents residing in Zone 14 (the zone Tring is located within) 64.0% of respondents visit the centre for chemist goods and 48.0% for DIY and gardening goods. There are three charity shops located within Tring Town Centre equating to 3% of the centre's overall representation.
Services	Representation of retail service units (18.5%) is above the UK average of 14.5%. There is a strong representation of leisure services which makes up 30.4% of overall units. This is above the UK average of 23.9% and reflects the number of restaurants and cafes within the centre. Representation of Financial and Business Services (15.2%) is also above the UK average – 10.2%. Notwithstanding this, Tring does not have a bank located within the town centre. Services are predominantly located on the edge of the High Street outside of the Primary Shopping Area. There are 18 units that contribute to the evening economy within the Town Centre (restaurants, bars, public houses and take away units) equating to 19.6% of the overall representation of retail units.
Vacancies	The number of vacancies in the town centre has reduced by 2 since 2004 and at the time of the Nexus site visits, there was only 1 vacancy within the town centre, located to the west of the High Street (74 High Street).
Rents	From reviewing available online sources and notwithstanding the attraction of specific locations across the town centre due to the close proximity to certain facilities, the average rent for retail units in Tring is circa £20.00 psf. **Source:** https://propertylink.estatesgazette.com/retail-for-rent/tring

Pedestrian Flows	At the time of the Nexus site visits, the centre was moderately busy with highest pedestrian activity witnessed in and around Dolphin Square precinct. The High Street also had fairly high activity.
Accessibility	The town centre is located between Aylesbury and Hemel Hempstead on the A41. The main car parks within Tring Town Centre are the Forge (143 spaces – paid parking) and Old School Yard (39 spaces – paid parking). At the time of the Nexus site visits, the car parks appeared well used, however, there were spaces available within both of them. There are a number of bus stops located within the town centre but the centre is poorly connected to the train station, which is located outside of the town boundary. The majority of visitors appeared to travel to the centre via car. This was reflected in the NEMS Household Survey where 79.0% of respondents who visit Tring the most said they travelled via car compared to 13.6% who walk. The Natural History Museum, located south of the centre, is a popular leisure facility but is poorly connected to the town centre.
Perception of Safety	At the time of the Nexus site visits, the centre had a safe ambiance. A fairly active night time economy provides natural surveillance until late at night.
Environmental Quality	The centre has a very pleasant urban environment with ample street furniture and well maintained shop frontages. This is reflected in the NEMS Household Survey where 13% of respondents said that they liked the 'environmental quality' most about Tring. At the time of the Nexus site visits signage was recognised as being particularly good. Plenty of noticeboards, maps and street signage are located throughout the centre. The centre is compact and walkable, however, pavements are notably narrow in some areas of the town centre and in some areas in need of repair.
Customer Views and Behaviour	When asked what they like most about the centre, 23% of respondents said it is because Tring is 'close to home 'and 14% said it was due to 'familiarity of the centre', reflecting the compact nature of Tring Town Centre.
Stakeholder Feedback	A particularly good response was received from Stakeholders representing Tring. Responses were received from Tring Town Council, I Love Tring Retail Group and Tring Together. Responses suggested that Tring is currently fulfilling its role as a town centre with a strong mix of units. The vibrancy of the high street and plethora of independent retailers throughout the centre was noted as a particular positive. The evening economy is noted to be particularly good and the town centre is

	considered to have a good mix of units. There are lots of community run events attracting visitors to the Town Centre throughout the year. Street lighting was highlighted as an area for improvement although in general street furniture is considered to be well maintained. Dolphin Square is considered to be outdated and in poor condition compared to the rest of the town centre. The pavements are also particularly narrow and noted to be in poor condition. Connections to the train station are considered to be very poor.

Borehamwood
Hertsmere Borough Council

Description	Borehamwood is the largest centre within Hertsmere Borough Council, and is home to the main Council Offices, BBC Elstree Studios, a small cinema, and The Venue Leisure Centre. The centre is comprised mainly of the High Street, Shenley Road, as well as a retail park just off the main street called Borehamwood Shopping Park. Recent improvements to the connectivity between Shenley Road and the retail park will benefit both areas. The centre is accessible by train, with the Elstree and Borehamwood Railway Station running Thameslink services to London and towns further north.
Current Status	Town Centre



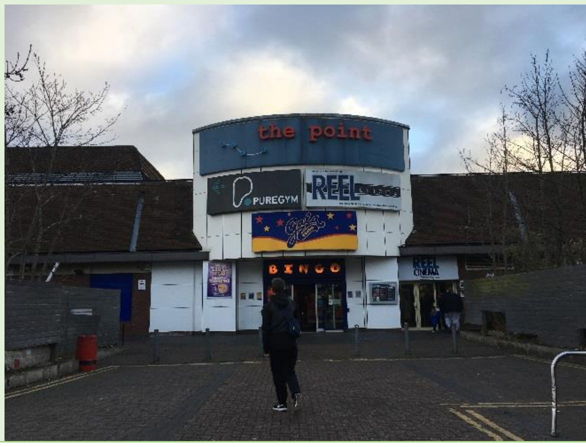


Table C.4 Town Centre Composition

Borehamwood	Units (%) 2012	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	11.1	12.2	8.8	29.6	15.2
Comparison	32.1	28.2	31.0	36.6	34.9
Retail Services	13.7	15.4	14.5	5.5	6.8
Leisure Services	19.5	27.7	23.9	19.9	25.0
Financial and Business Services	10.5	12.2	10.3	5.9	7.7
Vacant	13.2	4.3	11.2	2.5	9.8
TOTAL	100	100	100	100	100

Source: Hertsmere Borough Council, 2012 and Experian, 2017

Overall Composition	Borehamwood Town Centre is the largest of the centres within Hertsmere Borough. At the time of the Nexus site visits, Borehamwood had 188 units within the town centre. This is a reduction of two since the 2012 retail survey was undertaken by Hertsmere Borough Council. In that five year period, the most significant changes are a reduction in the number of vacancies (13.2% to 4.3%), and an increase in the proportion of leisure services units (19.5% to 27.7%). The town centre features an interesting division between Shenley Road, which is a conventional high street, and Borehamwood Shopping Park, in retail park format. While adjoining, both serve different purposes. The Shopping Park is car dominated, but the amount of parking and accessibility benefits the retail offer on Shenley Road. The Primary Shopping Frontage runs along Shenley Road between Furzehill Road and Grosvenor Road, and throughout Borehamwood Shopping Park. Secondary Shopping Frontages are located at the east and western ends of the town centre including the Tesco Extra. As shown in Table 4.5 in Chapter 4 of this Retail Study, the total retail floorspace for Borehamwood is 59,770 sq m.
Convenience & Comparison	Convenience units accounted for 12.2% of units within the town centre, slightly higher than the UK average of 8.8%. In 2017, the amount of convenience floorspace was 29.0% of the total, which is significantly higher than the UK average of 15.2%. This may partly be attributed to the large Tesco Extra within the town centre, although it should be noted that this particular Tesco Extra has large portion of floorspace dedicated to comparison

	retail. According to the NEMS Household Survey, this particular Tesco Extra is the second most popular location for main food shopping within the Study Area. Turning to comparison units within the town centre, both the proportion of units and floorspace is similar to the UK averages. There has been a reduction in the proportion of comparison units in the town centre from 32.1% in 2012 to 28.2% to 2017, however this a trend that is being seen across the UK as services become more prominent within town centres. Borehamwood had a total of 11 charity shops within the Town Centre. Ten of those charity shops were located on Shenley Road.
Services	Borehamwood Town Centre has a strong offer of services in all three categories in terms of proportion of units. This is evidence to Borehamwood being the largest and main centre within Hertsmere Borough. However, when focussing on floorspace, all three service categories fall below the UK average, indicating that services units are generally smaller. For example, leisure services account for 19.9% of floorspace within the town centre, compared with the UK average of 25.0%. A similar trend exists for retail services and financial and business services. The existing cinema and Pure Gym complex, not included within Experian’s Goad plan boundary, represents an opportunity to improve the existing leisure offer within the town centre. Importantly, a popular Council run leisure facility is located just outside the boundary of the town centre. In terms of evening economy offer, 33 of the 188 total units within Borehamwood Town Centre were restaurants, takeaways, pubs, or bars, equating to 17.6% of all units. Of respondents to the household survey who stated that they visited Borehamwood the most, 7 respondents identified that a better nightlife offer would encourage them to visit Borehamwood more often.
Vacancies	Between 2012 and 2017, the number of vacant units within Borehamwood town centre fell from 25 to 8. Both the proportion of vacant units and vacant floorspace are well below the UK averages.
Rents	From reviewing available online sources and notwithstanding the attraction of specific locations across the town centre due to the close proximity to certain facilities, the average rent for retail units in Borehamwood is circa £30.00 psf with higher rents evident to the north east of Shenley Road along the prime retail pitch. **Source:** https://propertylink.estatesgazette.com/commercial-property-for-rent/borehamwood
Pedestrian Flows	In terms of pedestrians, Borehamwood was generally observed to be busy, both along Shenley Road and within Borehamwood Shopping Park. A regular street market is held in the slip road along Shenley Road every Tuesday and Saturday, which also draws visitors to the centre. There appeared to be higher pedestrian flows at the western end of Shenley Road, particularly where some newer units have been developed at Keystone Passage. .This part

	of Shenley Road benefits from the through flow of footfall between here and the Retail Park.
Accessibility	Borehamwood is well served by transport options. The Elstree and Borehamwood Railway Station is located at the western edge of the town centre. In addition, bus routes connect the town centre with Edgeware and Barnet. Four Council run car parks are located either within the town centre or just on the edge of centre. These car parks provide a total of 782 car parking spaces across four separate car parks (Civic Offices, Brook Road, Clarendon Road, and Furzehill Road) and the Council charges a small fee. Overall the quality of the Council run car parking is good, although the Furzehill Road car park would benefit from some improvements. There is also free car parking in both the Tesco car park (640 spaces) and Borehamwood Shopping Park car park (610 spaces). Borehamwood Shopping Park management is currently looking to implement paid parking at this location. At peak times, Shenley Road was observed to become quite congested. In the NEMS Household Survey, 75.4% of respondents who visited Borehamwood the most arrived by car, while 9.0% walked.
Perception of Safety	At the time of the Nexus site visits, no anti-social or dangerous behaviour was observed, and the level of pedestrian activity ensured a safe environment. CCTV equipment is present throughout the centre. Hertsmere Borough Council is part of the Hertfordshire CCTV Partnership which aims to provide reassurance across main public, residential, retail, business and school areas by providing comprehensive surveillance.
Environmental Quality	Significant works have been undertaken over the past decade to improve the urban environment of Borehamwood. However, parts of Shenley Road would still benefit from some façade improvement work to increase the overall attractiveness and desirability of the centre as a place to shop and visit restaurants. This would also help to improve the perception of Borehamwood. Borehamwood Shopping Park is particularly car dominated, but improvements are being made to the public realm. Keystone Passage is an important connection between the Park and Shenley Road, which would benefit from being more inviting.
Customer Views and Behaviour	Of respondents to the NEMS Household Survey who identified that they most visit Borehamwood, 39.0% stated that what they like the most is the choice and range of shops, while 23.0% identified that it was close to home. When asked if there were any measures that would encourage visitors to visit more often, 11.0% of respondents stated increased parking, 6.0% stated increased general choice of shops, and 6.8% stated they would visit more often if it was easier to get to by car. These responses indicate that the centre would benefit from improved parking and traffic conditions.
Stakeholder Feedback	A strong response was received from Stakeholders including the Elstree and Borehamwood Residents Association and the Manager of the Borehamwood Retail Park.

	Feedback included views that the public realm of the High Street needed improving. In particular, the pavement requires improvement and more trees would be welcomed. Responses suggested that, apart from the retail park, the composition of retail stores is weak with too many service units. More independent stores would be welcomed. There is quite a lot of congestion down Shenley Road and the Boulevard in peak hours and more parking is needed within the town centre. Crossing Shenley Road can also be difficult, particularly as there are no zebra crossings. There are currently limited facilities and attractions drawing people to the town centre. More evening and weekend events should be encouraged.

Potters Bar, Darkes Lane
Hertsmere Borough Council

Description	Potters Bar is located in the north east of the Borough and is the second largest centre within Hertsmere Borough, second to Borehamwood. The Darkes Lane Local Town Centre serves an important role within the community, providing an offer of convenience and comparison goods as well as services. The town is highly accessible, having a dedicated train station within the centre.
Current Status	Local Town Centre

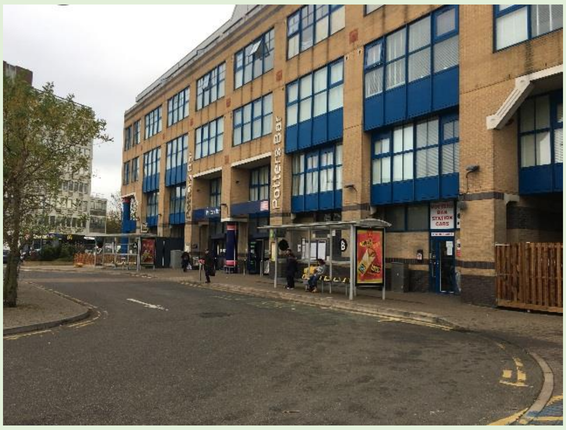


Table C.5 Local Town Centre Composition

Potters Bar (Darkes Lane)	Units (%) 2012	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	11.0	7.0	8.8	19.4	15.2
Comparison	33.1	27.2	31.0	26.4	34.9
Retail Services	20.3	22.8	14.5	13.2	6.8
Leisure Services	16.9	26.3	23.9	29.2	25.0
Financial and Business Services	16.1	11.4	10.3	7.9	7.7
Vacant	2.5	5.3	11.2	4.0	9.8
TOTAL	100	100	100	100	100

Source: Hertsmere Borough Council, 2012 and Experian, 2017

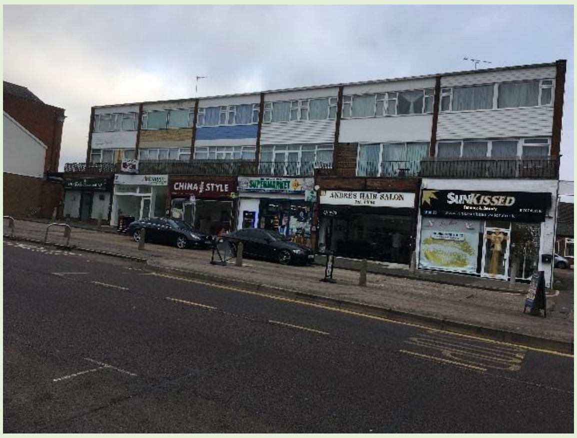
Overall Composition	Experian's Goad data includes 114 units within the centre, as identified in 2017. The 2012 Hertsmere Borough Council Retail Survey identified 118 units. The majority of town centre is included within the Primary Shopping Frontage and the town is anchored by a Sainsbury's which is located adjacent to the railway station. The centre is concentrated around Darkes Lane, and is to some extent divided by the railway bridge that passes over. The northern section of the town is comprised of parades of shops along both sides of the road, while south of the railway line, the parades operate down to Mutton Lane. Potters Bar High Street is located approximately 1km to the east of Darkes Lane. To some extent the two centres compete with each other, although also have different roles in the broader retail context. As illustrated in table 4.5 in Chapter 4 of the Retail Study, the total retail floorspace in Potters Bar, Darkes Lane is 20,050 sq m.
Convenience & Comparison	While the centre has a similar proportion of convenience units (7.0%) compared with the UK average (8.8%), it has a higher proportion of convenience floorspace. This may be attributed to the large Sainsbury's within the local centre boundary. Overall, the convenience offer within the centre has reduced from 11.0% in 2012. Similarly, the proportion of comparison goods units has reduced from 33.1% in 2012 to 27.2% in 2017. This is below the UK average of 31.0%. In addition, the amount of comparison floorspace (16.4%) is below the UK average of 34.9%. This reduction is both a reflection of the general trend away from comparison goods

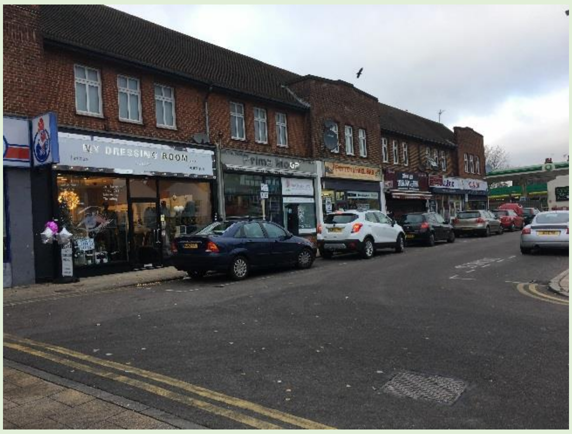
	within smaller centres, and also that Potters Bar competes with larger centres with a stronger comparison goods offer. At the time of the Nexus survey there were 7 charity shops within Potters Bar Darkes Lane. All charity shops were located on Darkes Lane.
Services	The general trend in services in Potters Bar Darkes Lane since 2012 has been an increase in retail and leisure services within the centre. There is a particularly high proportion of retail services when compared with the UK average (22.8% compared with 14.5%). There has been a reduction however in the proportion of financial and business services units, which provides a wide array of services including banking, property and printing. Since 2012 the proportion of leisure services has increased from 16.9% to 26.3%. While this is a trend being seen across the UK, this appears to be a particularly quick increase. There is a strong presence of services that are categorised as fast food and takeaways (10 of 30). When considering evening economy, Potters Bar Darkes Lane had 20 of the total 114 units falling within the evening economy category (restaurants, takeaways, bars, pubs). This equates to 17.5% of the total units within the district centre.
Vacancies	The centre has a lower than average proportion of vacancies, with just six, or 5.3% of units. In 2012 there were three vacancies in Potters Bar Darkes Lane, as identified in the Hertsmere Retail Survey.
Rents	From reviewing available online sources Potters Bar Darkes Lane has average rents of £37.00 psf. Rents reach up to £50.00 along the prime retail frontage which is higher than Potters Bar High Street. **Source:** http://www.shopproperty.co.uk/shops/Potters%20Barand https://www.acuitus.co.uk/property/2682/
Pedestrian Flows	The centre was reasonably busy, with easy on-street parking located throughout the centre allowing accessibility for vehicles to pull in for short periods of time and patrons to visit local shops.
Accessibility	The NEMS Household Survey identified that of respondents who stated that they visited Potters Bar Darkes Lane the most of the Study centres, 80.0% travelled by car either as the driver or a passenger. There are two Council run car parks servicing Potters Bar Darkes Lane offering a total 222 car parking spaces at a reasonable price. There is also the Sainsbury's car park offering 243 free car parking spaces, and the Potters Bar Station car par which is privately run and has 202 spaces at a small cost. 11.2% of respondents of the Household Survey travelled to the centre by walking.

Perception of Safety	At the time of the Nexus site visits no anti-social behaviour was observed. The consolidated nature and business of the centre leads to reasonable footfall and therefore limited ability to be able to commit any form of crime. CCTV cameras were in operation.
Environmental Quality	The centre is of moderate environmental quality. It would benefit from additional landscaping and greenery along Darkes Lane. Some shopfronts would also benefit from cosmetic improvement, and the railway station has significant potential for improvements.
Customer Views and Behaviour	When asked what they liked most about Potters Bar Darkes Lane, 33.0% of respondents who visited Potters Bar Darkes Lane the most, identified that the centre is close to home. 13.2% identified they like the choice of services (hairdressers and banks etc). When asked what would encourage respondents to visit Potters Bar Darkes Lane more, 28.5% identified increased choice and range of shops, as their first response.
Stakeholder Feedback	No stakeholder responses were received for Potters Bar, Darkes Lane.

Potters Bar, High Street
Hertsmere Borough Council

Description	Potters Bar (High Street) is located within Potters Bar in the north west part of the Borough. While in close proximity to the Potters Bar (Darkes Lane) centre, the High Street serves a separate function to Darkes Lane. The centre is long and linear, consisting predominantly of small parades of shops, often with dedicated parking areas. The High Street itself is a busy road, and pedestrians suffer to some extent from the car dominated environment.
Current Status	District Centre





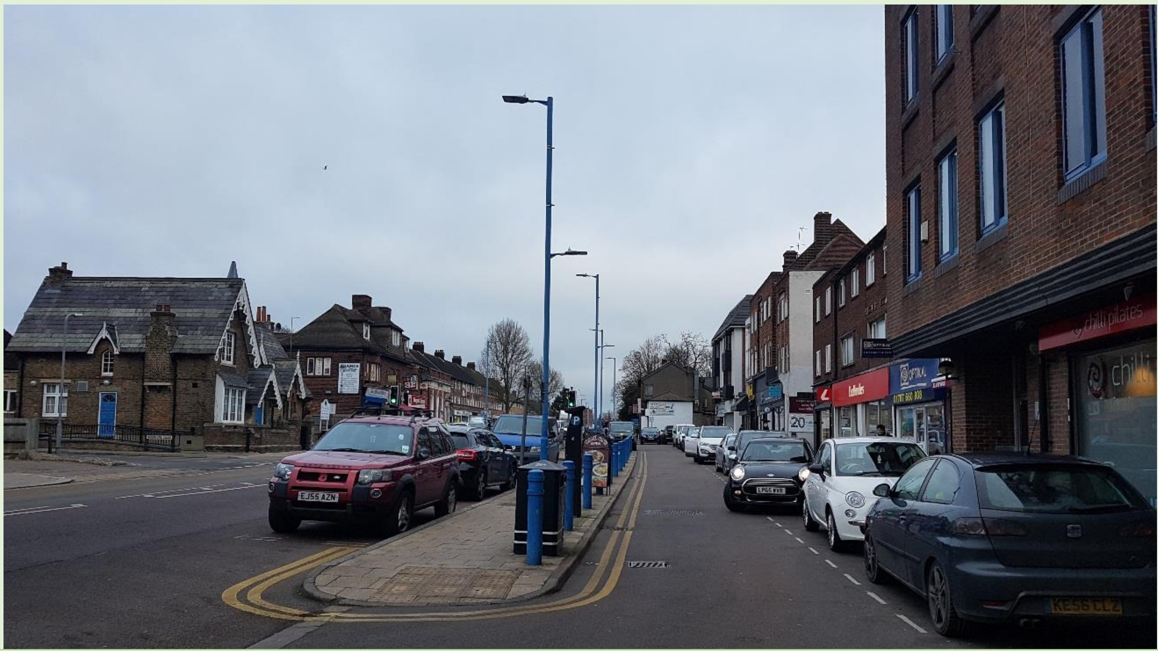


Table C.6 *District Centre Composition*

Potters Bar (High Street)	Units (%) 2012	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	6.8	7.7	8.8	25.5	15.2
Comparison	43.2	23.8	31.0	20.9	34.9
Retail Services	15.9	24.6	14.5	16.7	6.8
Leisure Services	23.9	30.8	23.9	25.1	25.0
Financial and Business Services	0.0	6.9	10.3	6.5	7.7
Vacant	10.2	6.2	11.2	5.1	9.8
TOTAL	100	100	100	100	100

Source: Hertsmere Borough Council, 2012 and Experian, 2017

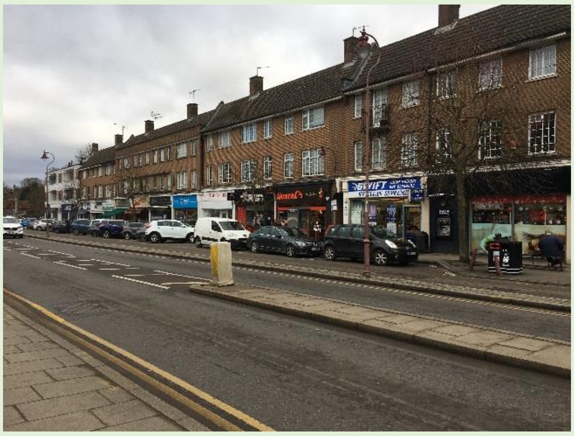
Overall Composition	The 2012 Retail Survey identified 88 units within the district centre boundary. The Experian Goad Plan, which has been used for the 2017 composition includes a larger centre boundary and 130 units have been included. Since 2012 there have been some fairly significant shifts in the overall composition of the district centre. Comparison units went from representing 43.2% of units to 23.8% in 2017. Similarly, financial and business services units grew from representing no units to 7.3%, (nine units) in 2017. There was also an increase in leisure services from 23.9% to 30.8%. Potters Bar High Street is comprised completely of Secondary Shopping Frontage, further indication of its supporting function to Potters Bar Darkes Lane. As illustrated in Table 4.5 in Chapter 4, the total retail floorspace for Potters Bar High Street is 26,650 sq m.
Convenience & Comparison	While the convenience offer is similar to the UK average when considering proportion of units, the centre has a higher than average convenience floorspace (25.5% compared with 15.2%). This is a result of the large floorplate Tesco supermarket located on Mutton Lane, which serves a large population. The centre has a low comparison retail offer, although this proportion of comparison retail units has reduced from 43.2% in 2012 to 23.8% in 2017. The UK average is 31.0%. The centre also has a low proportion of comparison floorspace at 20.9% compared with the UK average of 34.9%. The comparison offer of the

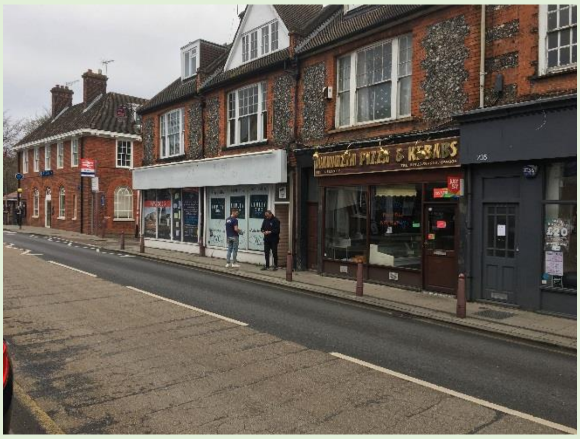
	centre is predominantly focused around DIY stores, electronics and furniture, rather than clothing. At the time of the Nexus site visits there were no charity shops within this centre.
Services	Potters Bar High Street has a high proportion of retail services both in terms of units and floorspace. Retail units have also increased from 15.9% to 24.6% between 2012 and 2017. The centre has a notably high proportion of leisure services, both in terms of units and floorspace when compared with the UK average. The proportion of leisure services units has increased from 23.9% to 30.8% between 2012 and 2017. 6.9% of units within the centre are financial and business services units, an increase from 0% in 2012. Both the proportion of units and floorspace is well below the UK average. The majority of business and financial services units were property and building services. Potters Bar High Street has 20 units which are included within the 'evening economy' category (restaurants, takeaways, bars and pubs). This equates to a total of 15.4% of the total 130 units.
Vacancies	The number of vacancies within the centre has increased from 9 to 10 since 2012, although still has a lower proportion of vacant units than the UK average.
Rents	From reviewing available online sources and notwithstanding the attraction of specific locations across the town centre due to the close proximity to certain facilities, the average rent for retail units in Potters Bar High Street is circa £20.00 psf. **Source**: https://www.zoopla.co.uk/to-rent/commercial/property/potters-bar/
Pedestrian Flows	The centre was a reasonably car dominated environment and there was limited pedestrian activity, a result of the linear environment. Pedestrian activity was mostly restricted to individual shopping parades.
Accessibility	The NEMS Household Survey results identified that of those that visited Potters Bar High Street the most of the Study centres, 83.9% travelled by car as either the driver or passenger. The next most popular travel arrangement (walking) was 11.2%. These figures are further evidence to the car dominated environment. In addition to on street parking at shopping parades, there are three Council run car parks servicing the centre and offering a total of 133 car parking spaces for a small charge. In addition to the Council run car parks there are also the Tesco car park (450 spaces) and a privately run car park at Oakmere House (95 spaces).
Perception of Safety	While no antisocial behaviour was observed, the centre did not provide a particularly inviting environment for pedestrians, being car dominated.

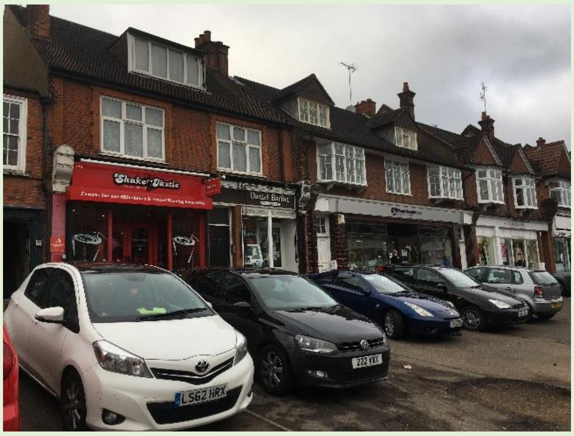
Environmental Quality	The centre would benefit from significant urban environment improvement works, including works to shop fronts as well as general public realm improvement and providing an improved pedestrian environment.
Customer Views and Behaviour	When asked what would encourage them to visit Potters Bar High Street more often, 33.5% of respondents to the NEMS Household Survey identified increased general choice and range of shop as their first choice. 11.8% identified more independent / specialist shops as their first choice. Interestingly, 7.8% of respondents said that 'a better layout/ shops closer together' would encourage them to visit the town centre more often, reflecting the disjointed layout of both Potters Bar Darkes Lane and Potters Bar High Street.
Stakeholder Feedback	No stakeholder responses were received for Potters Bar High Street.

Radlett
Hertsmere Borough Council

Description	Radlett is located in the northern part of Hertsmere Borough and is centred around Watling Street. The district centre is well connected having a railway station which is on the Thameslink Line, connected with London and other larger centres to the north. The centre serves an affluent population and it is understood that there is a low turnover of units generally within the centre boundary.
Current Status	District Centre







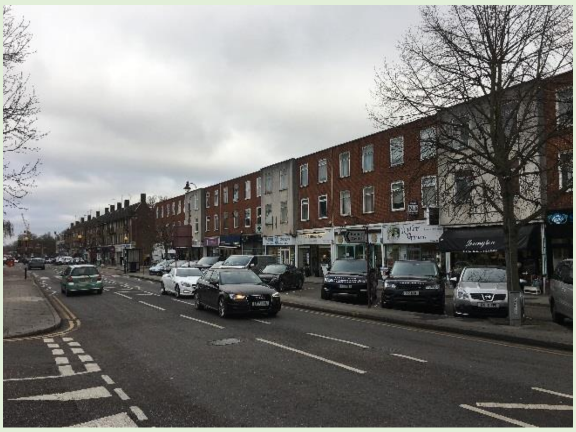


Table C.7 District Centre Composition

Radlett	Units (%) 2012	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2012	Floorspace UK Avg. (%)
Convenience	9.5	11.2	8.8	9.7	15.2
Comparison	25.3	22.5	31.0	25.8	34.9
Retail Services	24.2	27.0	14.5	17.8	6.8
Leisure Services	22.1	20.2	23.9	23.7	25.0
Financial and Business Services	13.7	13.5	10.3	16.0	7.7
Vacant	5.3	5.6	11.2	7.1	9.8
TOTAL	100	100	100	100	100

Source: Hertsmere Borough Council, 2012 and Nexus Planning 2017

Overall Composition	During the 2012 Retail Survey, 95 units were recorded within the district centre. At the time of the nexus site visits, 89 units were observed. The reduction in units over that period may be as a result of some redevelopment works that were in the construction phase at that time and have therefore not been included. There has been limited variance in the overall composition of Radlett since 2012. There is a market on every 4th Sunday of the month held in Watling Parade. The district centre is anchored by a Tesco Express supermarket. The only other National Multiple present within the centre is a Boots Pharmacy. Radlett SPD identifies a number of development sites throughout the district centre which may come forward for additional or improved retail units.
Convenience & Comparison	Radlett District Centre has a slightly higher offer of convenience goods than the UK average (11.2% compared with 8.8%). This is testimony to the centre having a high proportion of independent shops such as bakers, butchers and delicatessens. The centre also has Tesco Express and a Budgens. The centre has a smaller offer of comparison goods compared with the UK average (22.5% compared with 31.0%). This has reduced since 2012, indicating that Radlett's role within the wider region is focussed more around convenience and servicing.

	There were two charity shops identified in Radlett at the time of the Nexus site visits.
Services	Radlett District Centre has a particularly high proportion of retail services units (27.0%) compared with the UK average (14.5%), and during the Nexus site visits a high proportion of the retail services units were identified as health and beauty outlets. Radlett has a slightly lower proportion of leisure services (20.2% compared with 23.9%), although it was noted that the majority of leisure services were cafes and restaurants, and there were found to be very few takeaways. This is an indication of the affluence of the local population in Radlett. When considering evening economy, 11.2% of units, or 10 of the total 89 units fell into the evening economy category (restaurants, takeaways, pubs and bars).
Vacancies	Radlett has a low proportion of vacant units within the district centre boundaries with just five vacancies, or 5.6% of units. This is well below the UK average of 11.2%.
Rents	From reviewing available online sources and notwithstanding the attraction of specific locations across the town centre due to the close proximity to certain facilities, the average rent for retail units in Radlett Town Centre is circa £34.00 psf. **Source:**https://www.primelocation.com/to-rent/commercial/property/radlett/
Pedestrian Flows	At the time of the Nexus site visits there was limited pedestrian flow throughout the centre. The centre was observed to be particularly quiet. The most pedestrian movement occurred in the southern part of the centre.
Accessibility	The railway station at Radlett operates Thameslink services north and south. There is one Council run car park servicing the centre, the Newberries Car Park, and has 196 spaces. In addition, there is a privately run car park located near to the railway station which has 294 spaces. In the NEMS Household Survey, 78.7% of respondents who identified that they visit Radlett the most, travelled to the centre by car, either as the driver or passenger. 20.1% of respondents stated that they walked.
Perception of Safety	No anti-social behaviour was observed at the time of the Nexus site visits, and the centre was generally observed to be a peaceful and safe environment.
Environmental Quality	Radlett was observed as having a 'village-like' atmosphere, and had a high environmental quality. Some facades along Watling Street would benefit from some visual improvements.

Customer Views and Behaviour	Of respondents to the NEMS Household Survey who identified that they visit Radlett the most, 21.4% of the stated that the thing they liked most about Radlett was choice of services. 22.4% of respondents stated that it was because Radlett is close to home and 11.0% said it was because Radlett has convenient parking.
Stakeholder Feedback	Stakeholder feedback from Aldenham Parish Council noted a particularly weak evening economy although the Radlett Centre is very popular and attracts many visits to numerous shows. The need to improve the shop frontages along Watling Street was noted along with a desire for more independent stores.

Bushey
Hertsmere Borough Council

Description	Bushey is located in the west of the Borough, lying between Bushey Heath and Watford. One of the smaller centres of the Study, the centre plays an important role serving the local population and offering a smaller alternative to the larger Watford. Bushey District Centre is predominantly comprised of part of the High Street.
Current Status	District Centre

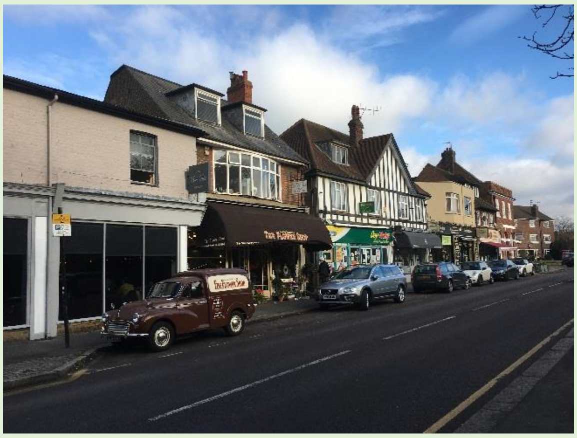
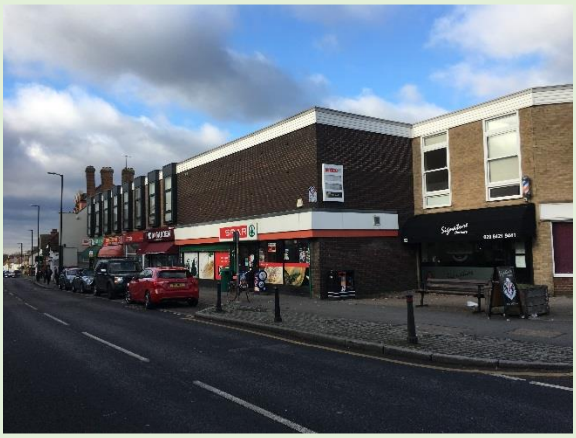
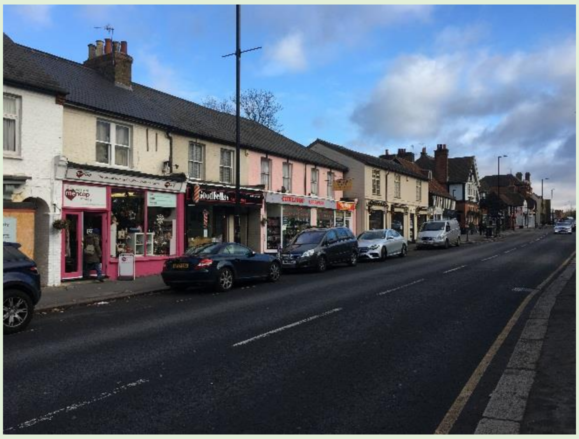
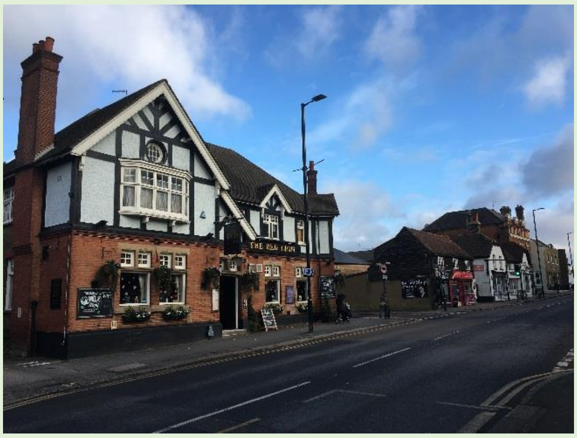





Table C.8 District Centre Composition

Bushey	Units (%) 2012	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	8.3	3.7	8.8	4.5	15.2
Comparison	29.2	16.7	31.0	12.3	34.9
Retail Services	14.6	22.2	14.5	24.4	6.8
Leisure Services	20.8	29.6	23.9	34.1	25.0
Financial and Business Services	16.7	20.4	10.3	17.8	7.7
Vacant	10.4	7.4	11.2	7.0	9.8
TOTAL	100	100	100	100	100

Source: Hertsmere Borough Council, 2012 and Experian, 2017

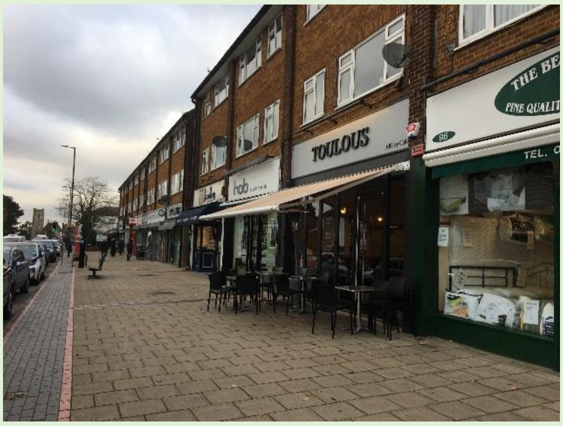
Overall Composition	There are 54 units in 2017 when using Experian Goad data. The Goad data includes a parade of shops on the northern side of High Street to the east and west of Koh-I-Noor Avenue that is not currently included within the district centre boundary. By comparison, the 2012 figures identify 48 units. Between 2012 and 2017, the trend in Bushey has been a reduction in the number of comparison and convenience units, and an increase in the proportion of services. The Primary Shopping Frontage is located on the northern edge of High Street, while the Secondary Shopping Frontage is predominantly on the southern side of High Street. As illustrated in Figure 4.5 in Chapter 4 of this retail study, the total retail floorspace in Bushey is 6,020 sq m.
Convenience & Comparison	The centre is anchored by a SPAR as the main convenience offer. The centre has a very low proportion of convenience units, just 2 of the overall 54 units, or 3.7%. Consequently, convenience floorspace is also very low, just 4.5% of the total floorspace. The centre also has a lower proportion of comparison units when compared with the UK average (16.7% compared with 31.0%), and a much lower proportion of comparison floorspace (12.3% compared with 34.9%).

	Bushey and Bushey Heath, which is located not far from Bushey, complement each other, with Bushey Heath having a stronger provision of convenience and comparison goods. At the time of the Nexus site visits there was one charity shop within Bushey District Centre.
Services	The District Centre has a high proportion of services, being well above the UK average for retail, leisure, and financial and business services both in terms of proportion of units and floorspace. In particular, 24.4% of floorspace was retail services, compared with the UK average of 6.8%. The centre provides a good array of financial and business services, although still has a high proportion of real estate agents (6 of 11). Of evening economy uses (restaurants, takeaways, pubs and bars) Bushey had the highest proportion (20.4%) of the centres that were surveyed.
Vacancies	In 2017, four vacant units were identified, a similar proportion to when the last retail study was carried out in 2012, during which there were five vacancies. Vacant units now account for 7.4% of total units, which is below the UK average of 11.2%.
Rents	From reviewing available online sources and notwithstanding the attraction of specific locations across the town centre due to the close proximity to certain facilities, the average rent for retail units in Bushey is circa £18.00 psf.
Pedestrian Flows	There was a reasonable flow of pedestrians throughout the centre, although there were no particularly popular hotspots. Some of the local cafes were identified as particularly busy.
Accessibility	The main car park servicing the district centre has a capacity of 120 spaces, and is free to use. At the time of the Nexus site visits this car park appeared to be particularly busy. Some on street car parking is also available throughout the centre. While there is no train station in Bushey, buses provide services to other towns within Hertsmere and Watford.
Perception of Safety	No anti-social behaviour was observed within Bushey at the time of the Nexus site visits, and perception of safety was good.
Environmental Quality	Bushey provides a pleasant environment for the local community. The environmental quality is of a good standard particularly in areas at the western edge of the centre where there is a church and public green. Parts of the eastern section of High Street would benefit from facade improvements.
Customer Views and Behaviour	Of respondents to the NEMS Household Survey who identified that they visited Bushey the most of the centres, 56.1% travelled by car either as the

	driver or passenger. 39.3% identified that they walked. This gives a good indication that Bushey serves a local population. When asked what they like most about Bushey, 39.5% of respondents stated that it was the choice of leisure facilities that drew them. 15.5% stated that it was because Bushey is close to home.
Stakeholder Feedback	No stakeholder responses were received for Bushey

Bushey Heath
Hertsmere Borough Council

Description	Bushey Heath is one of two district centres located in the Bushey area of Hertsmere Borough Council, the other being Bushey (High Street), which lies to the south west of Bushey Heath. Bushey Heath consists of a short strip of shops along High Road which provide everyday services and facilities serving the local population. The centre consists of 45 units, making it one of the smallest in the Study Area.
Current Status	District Centre



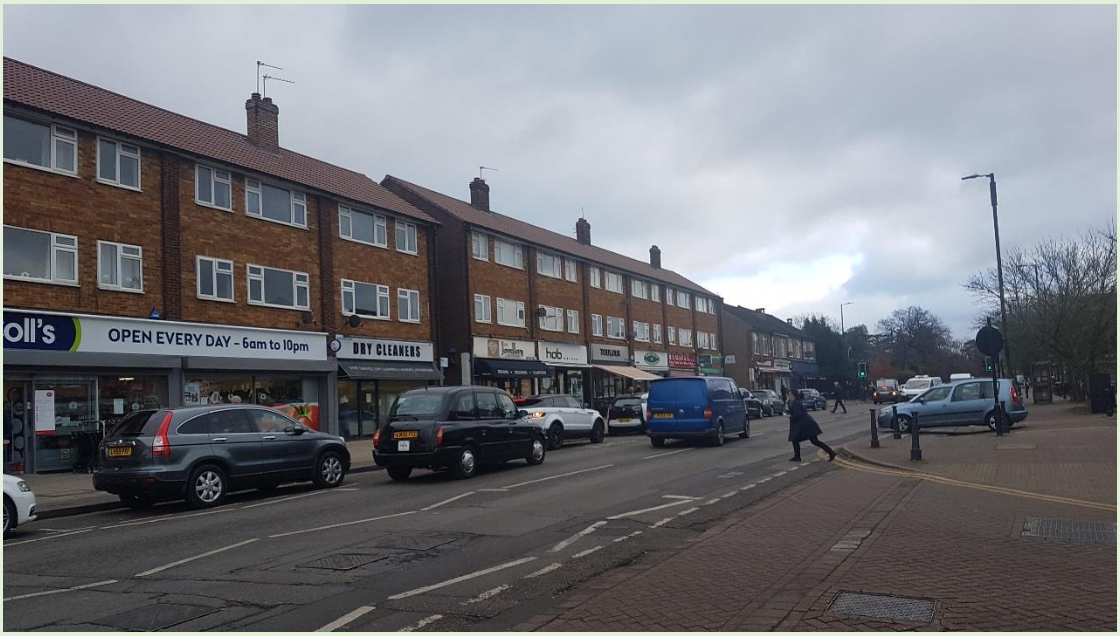


Table C.9 District Centre Composition

Bushey Heath	Units (%) 2012	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	10.6	20.0	8.8	25.3	15.2
Comparison	36.2	28.9	31.0	42.5	34.9
Retail Services	17.0	20.0	14.5	10.1	6.8
Leisure Services	21.3	20.0	23.9	15.6	25.0
Financial and Business Services	12.8	11.1	10.3	6.4	7.7
Vacant	2.1	0.0	11.2	0.0	9.8
TOTAL	100	100	100	100	100

Source: Hertsmere Borough Council, 2012 and Experian, 2017

Overall Composition	At the time of the 2012 Retail Survey, Hertsmere Borough Council identified 47 units within the district centre, while using Experian's Goad data, 45 were identified at the time of the Nexus site visits in November 2017. Since 2012 there has been a shift towards more convenience units within the district centre (10.6% to 20.0%), and a reduction in the number of comparison units. The district centre suffers from its close proximity to Watford, however also serves an important, more local role, as a smaller centre for dropping into for a top up shop or similar. The Primary Shopping Frontages in Bushey Heath are centred around the main parades in the High Road. Secondary Shopping Frontages are located at the northern and southern ends of the centre. As illustrated in Figure 4.5 in Chapter 4 of this retail study, the total retail floorspace in Bushey Heath is 6,210 sq m.
Convenience & Comparison	Bushey Heath has been identified to have a significantly higher proportion of convenience units (20.0%) and convenience floorspace (25.3%) when compared with the UK averages (8.8% and 15.2% respectively). The centre has a number of small scale convenience units serving the local population. In addition, there has been a decline in comparison units since 2012, from 36.2% to 28.9%. While the 2017 figure is slightly below the UK average for the proportion of units, the amount of comparison floorspace (42.5%) is above the

	UK average (34.9%). This shows that despite the centre's location near to Watford, it holds its own in terms of comparison shopping provision. At the time of the Nexus site visits there were two charity shops within the District Centre.
Services	Bushey Heath was identified to have a lower than average offer of leisure services units both in terms of proportion of units and floorspace. Leisure floorspace was identified to account for 15.6% of floorspace in the centre compared with the UK average of 25.0%. The centre competes with the nearby centre of Bushey, which has a particularly strong leisure offer. The district centre also has a slightly higher than average retail services offer, both in terms of proportion of units and proportion of overall floorspace. Financial services account for 11.1% of units in Bushey Heath, which is similar to the UK average. The majority of business and financial services units were real estate agents, which is common in smaller centres. In terms of evening economy provision, Bushey Heath was identified to have 6 units of the total 45 within the evening economy category (restaurants, takeaways, pubs and bars), which equates to 13.3% of total units.
Vacancies	There were no vacant units in Bushey Heath at the time of the Nexus site visits, an indication that there is high demand for retail space in the centre.
Rents	No information of local retail rents in Bushey Heath could be found using online sources.
Pedestrian Flows	The centre was reasonably busy at the time of the Nexus site visits, with pedestrians mainly identified at the Primary Shopping Frontage areas of the district centre. Cafes were observed to be particularly popular.
Accessibility	When asked how they usually travel to Bushey Heath, 56.0% of respondents to the NEMS Household Survey who identified that they visited Bushey Heath the most, travelled to the centre by car. 44.0% of respondents identified that they walked to the centre. There are two car parks in operation within Bushey Heath in addition to on street car parking. These car parks cater for approximately 100 car parking spaces in total.
Perception of Safety	At the time of the Nexus site visit, no anti-social behaviour was observed. The small scale and pedestrian crossing allow safe pedestrian movement.
Environmental Quality	The urban environment is of a reasonable quality. Some shop fronts would benefit from façade improvements to upgrade the urban space. Street trees and additional street furniture might also further benefit the urban environment.

Customer Views and Behaviour	When asked what they liked most about Bushey Heath, 41.4% of respondents to the NEMS Household Survey, identified choice of leisure facilities, while 40.5% identified that it is close to home. When asked what would encourage them to visit the centre more often, 13.9% of respondents identified more parking, while 10.3% said more food shops within the town centre.
Stakeholder Feedback	Stakeholder feedback was received from the Bushey Heath Residents Association who considered that Bushey Heath is fulfilling its role as a town centre and there is a strong mix of stores within the town centre. There is a particularly healthy evening economy with restaurants open late into the evening. However, there are no events attracting people to the town centre. It is considered that the pavements are currently in poor condition and their quality could be improved.

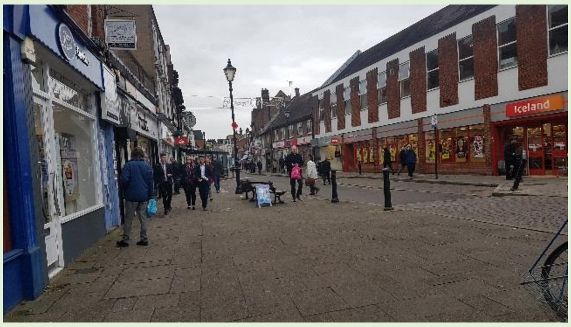
Rickmansworth
Three Rivers District Council

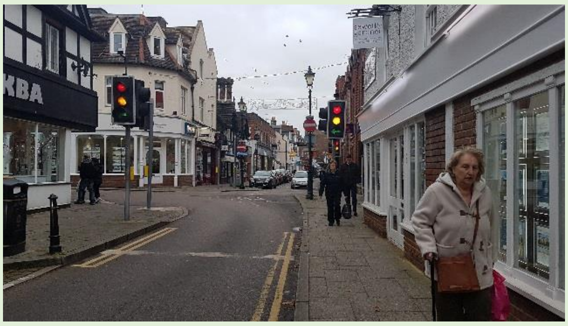
Description

Rickmansworth is the administrative centre for Three Rivers and is located geographically close to Chorleywood, Maple Cross and Croxley Green. The centre is based around the historic High Street and Church Street with a civic complex located at the edge of the centre to the east including the council offices, library, police station and Watersmeet Theatre. The centre is located within a Conservation Area.

The town serves the wider population, but loses patrons to larger centres such as Watford and Hemel Hempstead which provide a more comprehensive comparison goods offer. Regardless, the town provides an important function for shopping and services a large community.

Current Status Town Centre





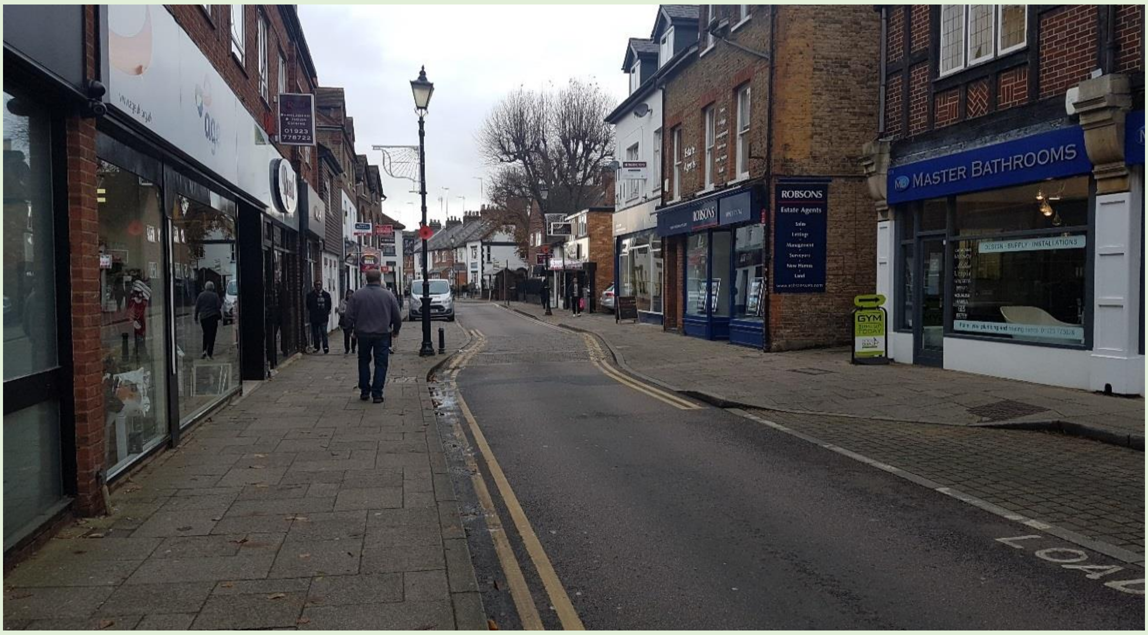


Table C.10 Town Centre Composition

Rickmansworth	Units (%) 2012	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	11.4	9.8	8.8	27.7	15.2
Comparison	28.6	23.8	31.0	17.8	34.9
Retail Services	20.0	18.9	14.5	8.6	6.8
Leisure Services	17.1	23.0	23.9	29.0	25.0
Financial and Business Services	19.0	21.3	10.3	14.8	7.7
Other Retail	0.0	0.0	0.1	0.0	0.1
Vacant	3.8	3.3	11.2	2.1	9.8
TOTAL	100	100	100	100	100

Source: Lambert Smith Hampton, 2012 and Experian, 2017

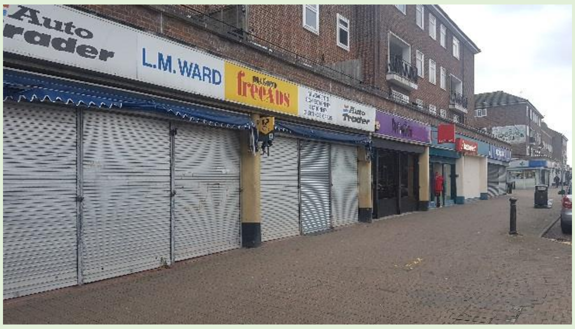
Overall Composition	At the time of the Nexus site visits, Rickmansworth Town Centre had 122 units. This is higher than the 105 units identified in the previous Retail Study carried out by Lambert Smith Hampton in 2012, due to differing town centre survey boundaries. For clarity, the boundaries that have been used for the purposes of this Study are taken from Experian's Goad data. The Primary Shopping Frontage is found along High Street and part of Church Street. Secondary Shopping Frontages continue south down Church Street and north up Station Road. The overall composition of Rickmansworth compared with the UK average is headlined by a particularly low level of vacancies (3.3% compared with 11.2%), a high proportion of financial and business services (21.3% compared with 10.5%) and a low proportion of comparison goods retailers (23.8% compared with 31.6%). As illustrated in Figure 4.5 in Chapter 4 of this retail study, the total retail floorspace in Rickmansworth is 6,210 sq m.

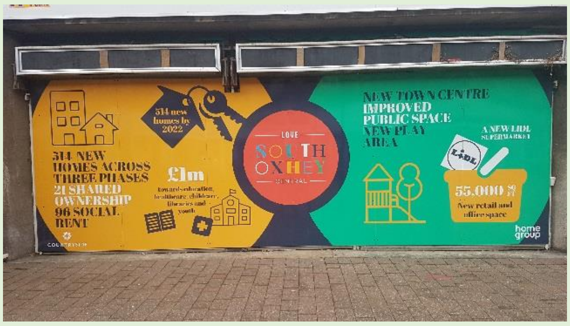
Convenience & Comparison	At the time of the Nexus site visits, 9.8% of units were convenience units, a reduction from 11.4% in 2012. Three of the four convenience units were supermarkets, and the centre is anchored by Waitrose, M&S and Iceland, which account for the large proportion of convenience floorspace (27.7%) compared with the UK average (15.2%). The centre has a low proportion of comparison retail in terms of both proportion of units (23.8% compared with the UK average of 31.0%) and overall floorspace (17.8% compared with 34.9%). At the time of the Nexus site visits there were six charity shops within the Town Centre.
Services	The centre has a particularly high proportion of financial and business services within the town centre (21.3%) when compared with the UK average of 10.3%. This is evidence to the fact that Rickmansworth is the administrative centre of Three Rivers District. There was a high proportion of the financial and business services units along Church Street. Since 2012, there has been an increase in the number of leisure services units within the town centre, a trend reflected across the UK. While there is considered to be limited evening economy within the town centre, Rickmansworth has four public houses within its town centre. Overall, 15 of the 122 total units fell within the evening economy category (restaurants, takeaways, bars and pubs), equating to 12.3% of total units. Five respondents to the NEMS Household Survey identified that improved nightlife, better restaurants or more bars and pubs would encourage them to visit Rickmansworth more often.
Vacancies	At the time of the Nexus site visits Rickmansworth had a very low vacancy rate, with just four vacant units identified. This vacancy rate has not changed since 2012, a positive indication of demand within the centre.
Rents	From reviewing available online sources and notwithstanding the attraction of specific locations across the town centre due to the close proximity to certain facilities, the average rent for retail units in Rickmansworth is circa £40.00 psf with the highest rents located along the High Street. **Source**:https://www.zoopla.co.uk/to-rent/commercial/retail-premises/rickmansworth/
Pedestrian Flows	The town centre has a pedestrian focussed urban environment benefitting from one lane of traffic passing through the centre of the town. The primary shopping areas were particularly busy at the time of the Nexus site visits. The centre was found to be easy to navigate.
Accessibility	The town centre has a number of large car parks, which are in close proximity to the main part of the town centre. In the NEMS Household Survey, 79.0%

	of respondents who stated that they visited Rickmansworth the most, travelled to the centre by car, either as the driver or passenger. There are 270 short stay free car parking spaces within easy walking distance of the centre. There are also other long stay car parks with an associated fee, and additional privately run car parks including at M&S and Waitrose. The Rickmansworth Railway Station operates London Underground Metropolitan Line services as well as Chiltern Railway services.
Perception of Safety	No antisocial behaviour was observed within the town centre. An improved nightlife would further improve the perception of safety in Rickmansworth Town Centre in the evenings.
Environmental Quality	For the most part Rickmansworth was observed to have a good quality urban environment and is considered to be quite compact. The centre would benefit from some cosmetic improvements to facades along the Primary and Secondary Shopping Frontages, and more additional, high quality public realm. Street trees and improved street furniture would also benefit the general perception of the centre.
Customer Views and Behaviour	16.0% of respondents of the NEMS Household Survey identified that 'Increased general choice and range of shops' would encourage them to visit Rickmansworth more often, indicating improved range of comparison stores would benefit the centre. In addition, 14.3% of respondents identified 'more parking'. While respondents often identify that they would like better and more parking facilities, the centre already provides extensive parking allocation. Better signage may improve the perception that there is limited parking within the town centre.
Stakeholder Feedback	Stakeholder feedback from Batchworth Parish Council and the Chamber of Commerce outlined that there is a reliance on service units and more independent stores would be desirable within the town centre. Strong accessibility was noted throughout the centre. There are also a number of local events throughout the year which are well attended, attracting visitors to the town centre. In particular, Rickmansworth Festival draws in large crowds to the area. Although there are a number of pubs, the evening economy could be improved.

South Oxhey
Three Rivers District Council

Description	South Oxhey District Centre is located at the centre of an extensive estate of post war social housing constructed to the south and west of Watford. The housing and shopping area is located surrounding a large public square. The District Centre is due to be completely redeveloped over the next few years. The centre is well serviced by public transport, having the Carpenders Park Railway Station within close proximity of the District Centre boundary. This station provides easy access to major centres including Watford and Central London.
Current Status	District Centre





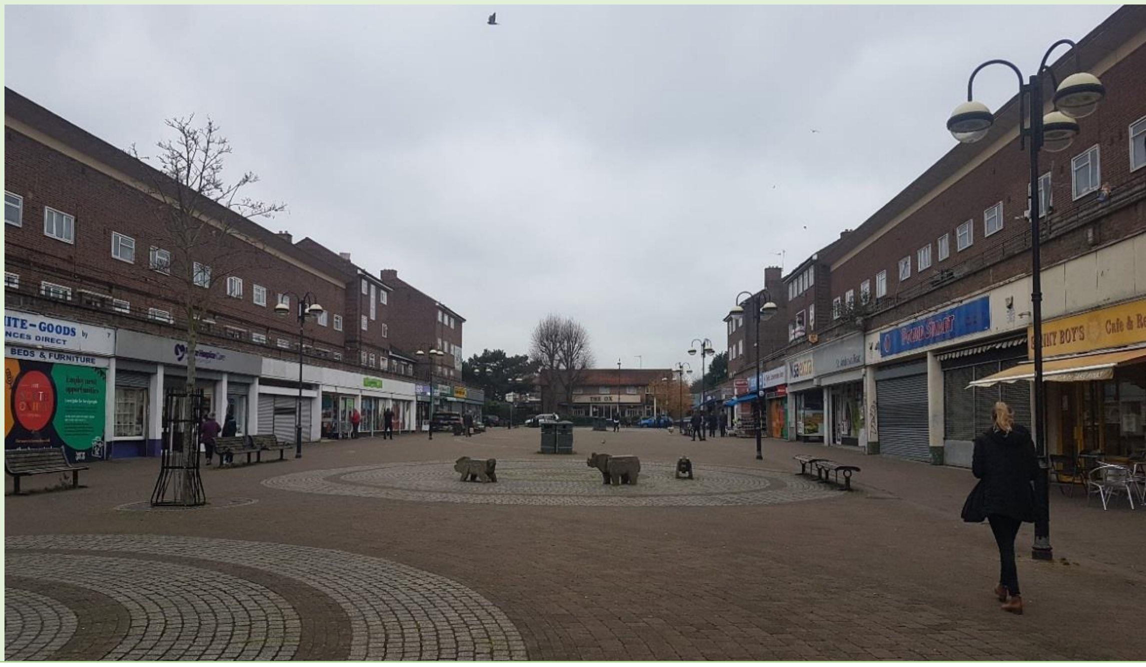


Table C.11 District Centre Composition

South Oxhey	Units (%) 2012	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	18.5	17.5	8.8	19.0	15.2
Comparison	29.2	19.3	31.0	25.2	34.9
Retail Services	20	24.6	14.5	16.1	6.8
Leisure Services	16.9	21.1	23.9	20.4	25.0
Financial and Business Services	10.8	3.5	10.3	1.9	7.7
Vacant	4.6	14.0	11.2	17.4	9.8
TOTAL	100	100	100	100	100

Source: Lambert Smith Hampton, 2012 and Experian, 2017

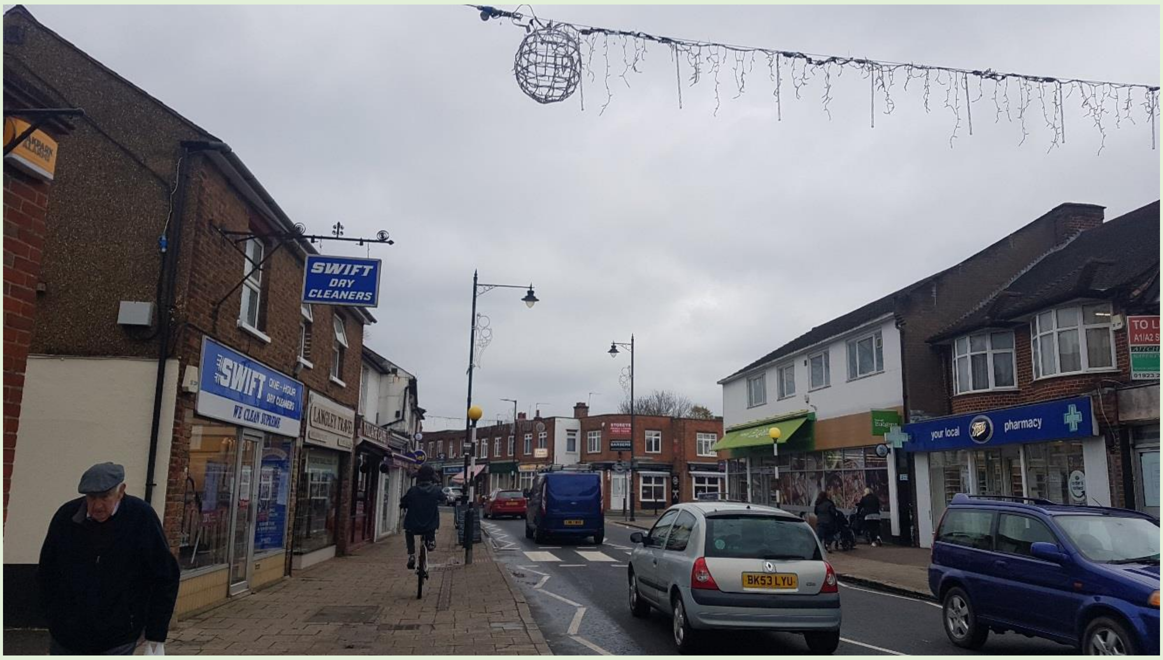
Overall Composition	South Oxhey District Centre will benefit significantly from impending redevelopment. The South Oxhey Initiative is a £150 million mixed use regeneration project being promoted by Three Rivers District Council in partnership with developers, Countryside Properties Ltd and Home Group. The 2012 Retail Study identified 65 units within the District Centre (excluding B1 and D1 uses). Since the previous retail study was completed a number of buildings have been demolished, explaining the reduction in the overall number of units within the centre. The present study identified 57 units in the centre, which is due to demolition of units surrounding the railway entrance. Primary Shopping Frontages feature along St Andrews Road (within the pedestrianised square) and Bridlington Road. There is Secondary Shopping Frontage along Prestwick Road. As illustrated in Figure 4.5 in Chapter 4 of this retail study, the total retail floorspace in South Oxhey is 7,810 sq m.
Convenience & Comparison	At the time of the Nexus site visits, South Oxhey had a high proportion of convenience units (17.5%) and a low proportion of comparison units (19.3%) compared with the UK averages (8.8% and 31.0% respectively). The convenience retail offer was made up of smaller scale 'top-up' type units rather than any large supermarkets. There was also a number of charity shops within the

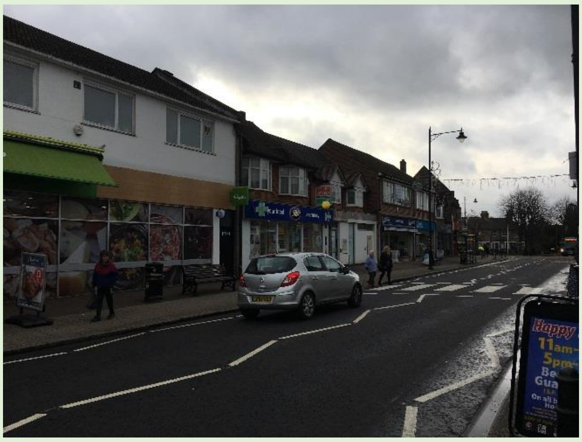
	centre, which is partly as a result of the impending redevelopment and other comparison retailers vacating the centre. At the time of the Nexus site visits there were two charity shops within the District Centre.
Services	Overall, South Oxhey's services composition favours retail services, accounting for 24.6% of units. This is comparable with the UK average of 14.5%. Similarly, retail services account for 16.1% of floorspace in South Oxhey, compared with the UK average of 6.8%. Comparatively, the District Centre has a particularly low proportion of business and financial services, with just 3.5% of units being within the category, compared with the UK average of 10.3%. The proportion of leisure services in the centre was similar to the UK average. The offer of leisure services was primarily cafes and takeaways. South Oxhey had one of the lowest proportions of evening economy units of the centres surveyed, with just 5 of the total 57 units (8.7%) falling into the evening economy category (restaurants, takeaways, bars and pubs).
Vacancies	There has been a significant increase in the number of vacancies since the 2012 Retail Study, from 4.6% to 14.0%. This is a result of impending redevelopment.
Rents	Limited information on retail rents in South Oxhey was available from reviewing available online sources. We understand that rents in the centre have previously been subsidised, with the plan that these subsidies are no longer necessary once the redevelopment is complete. **Source:**https://www.google.co.uk/search?q=retail+rent+south+oxhey&rlz=1C1GGRV_enGB752GB752&oq=retail+rent+south+oxhey&aqs=chrome..69i57.8799j0j4&sourceid=chrome&ie=UTF-8
Pedestrian Flows	There was limited footfall within the centre at the time of the Nexus site visits. The centre of South Oxhey is comprised of a large public square, although there was more pedestrian movement along Prestwick Road and Bridlington Road, where on street parking was available, and where customers are able to stop briefly to carry out 'top up shopping'..
Accessibility	Serviced by Carpenders Park Railway Station, the centre is well connected to London and Watford. On street car parking was accessible along Prestwick Road and Bridlington Road. Interestingly, despite the railway station, 65% of respondents in the NEMS Household Survey who identified that they most visit South Oxhey arrived by car. 35% identified that they walked.

Perception of Safety	No anti-social activity was observed at the time of the Nexus site visits. The residential dwellings at the upper levels within the centre create an environment that provides casual surveillance.
Environmental Quality	The environmental quality of South Oxhey was considered to be poor at the time of the Nexus site visits. The environmental quality will be improved significantly with the impending redevelopment.
Customer Views and Behaviour	In the NEMS Household Survey, respondents were asked which centre they visited the most often. Of those that responded within South Oxhey, 39.5% stated that what they liked the most about it was that it was close to home, and 32.0% said it was convenient for visiting family. This lends itself to the fact that South Oxhey is a centre based around local convenience. It is expected this may change following the redevelopment, and visitors may be drawn from elsewhere.
Stakeholder Feedback	No stakeholder responses were received for South Oxhey.

Abbots Langley
Three Rivers District Council

Description	Abbots Langley features a village like high street that has grown with overspill from Watford and Hemel Hempstead. While the centre competes with these larger centres, it plays an important role within the local area as a smaller, more accessible centre. The centre is located within a Conservation Area that provides a particularly attractive setting. The small centre features a multitude of convenience shops servicing the local population and has a strong provision of services.
Current Status	District Centre





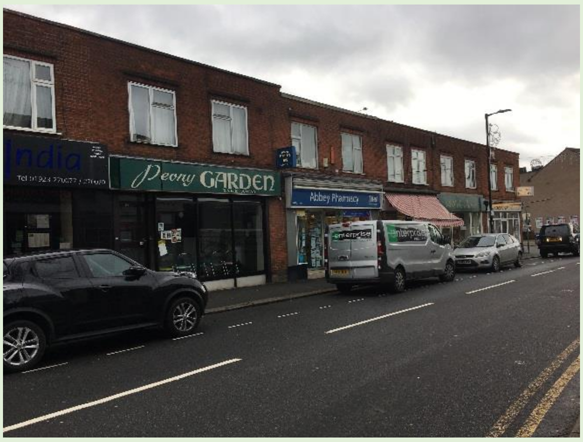


Table C.12 District Centre Composition

Abbots Langley	Units (%) 2012	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	16.7	17.1	8.8	27.9	15.2
Comparison	26.2	26.8	31.0	27.0	34.9
Retail Services	21.4	17.1	14.5	13.6	6.8
Leisure Services	21.4	24.4	23.9	19.4	25.0
Financial and Business Services	14.3	12.2	10.3	9.6	7.7
Other Retail	0.0	0.0	0.1	0.0	0.1
Vacant	0.0	2.4	11.2	2.5	9.8
TOTAL	100	100	100	100	100

Source: Lambert Smith Hampton, 2012 and Experian, 2017

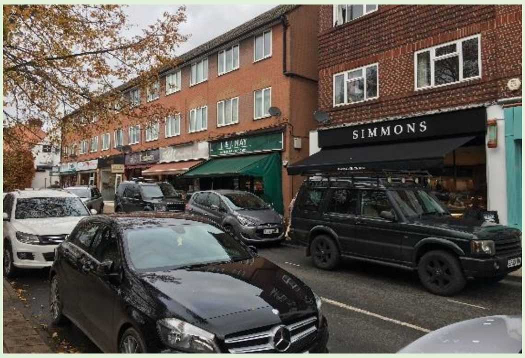
Overall Composition	Abbots Langley District Centre is comprised of 41 units and provides an important convenience and leisure services offer for residents of the wider area. Since the previous Retail Study was undertaken in 2012 there has been limited change in the composition of the centre. Observed changes include a reduction in retail services (21.4% to 17.1%), and an increase in leisure services (21.4% to 24.4%). The centre is anchored by a Budgens, but is also served by many independent retailers and key services including real estate agents, cafes and restaurants. Primary Shopping Frontages are located along the High Street, primarily between Abbots Road and St Lawrence Close. As illustrated in Figure 4.5 in Chapter 4 of this retail study, the total retail floorspace in Abbots Langley is 1,983 sq m, the lowest of all centres in the Study Area.
Convenience & Comparison	Abbots Langley District Centre has a high proportion of convenience units (17.1%) compared with the UK average (8.8%). To some extent this is because there is no large supermarket, instead featuring smaller scale convenience units such as bakeries, butchers and smaller convenience supermarkets. The Centre also has a higher proportion of convenience floorspace (27.9%) compared with the UK average (15.2%). The centre has a lower proportion of comparison units (26.8%) compared within the UK average (31.0%), although key comparison goods retailers are still present within the centre such as pharmacies, an optician and two electronics stores.

	At the time of the Nexus site visits there was one charity shop within the District Centre.
Services	Since the previous Retail Study was undertaken in 2012, there has been a slight reduction in the number of retail services units from 9 to 7, or 21.4% compared with 17.1%, bringing the retail services offer more into line with the UK average of 14.5%. The centre has a higher proportion of retail services floorspace compared with the UK average. At the time of the Nexus site visits, there were 11 leisure services units within the centre, an increase from 9 in 2012. The proportion of leisure services units is slightly higher than the UK average (24.4% compared with 23.9%), although when considering floorspace, the Centre has a lower proportion than the UK average. 12.2% of units within the District Centre were categorised as financial and business services. Of the financial and business units, 1 unit was a bank, while the other 4 were real estate agents. Of the total 41 units within Abbots Langley, 6 were included within the evening economy category (restaurants, takeaways, pubs and bars), equating to 14.6% of total units.
Vacancies	Only one vacant unit was observed within the District Centre, representing a very low vacancy rate of 2.4%. The vacancy is the Lloyds Bank building which has been vacated since the previous retail Study in 2012.
Rents	From reviewing available online sources and notwithstanding the attraction of specific locations across the town centre due to the close proximity to certain facilities, the average rent for retail units in Abbots Langley is circa £23.00 psf. **Source:** http://www.movehut.co.uk/rent/shop-in-radlett_hertfordshire/
Pedestrian Flows	Pedestrian flows were observed to be the busiest along High Street. There was also a busy parade of shops with separated parking just south of Abbots Road, offering primarily independent local shops. The parking arrangement at this location provides visitors an opportunity to park briefly and stop in at shops in this parade.
Accessibility	Of respondents to the NEMS Household Survey who identified that they visit Abbots Langley the most of the Study centres, 49.3% identified that they usually arrive by car, either as the driver or passenger. 49.5% identified that they walk to Abbots Langley, indicating that many of the visitors to the District Centre live locally. There is one long stay car park in Abbots Langley which has 106 car parking spaces.
Perception of Safety	At the time of the Nexus site visits, no anti-social behaviour was observed, and the District Centre appeared to be safe.

Environmental Quality	Abbots Langley is included within a wider Conservation Area which seeks to conserve the heritage and character of the area. The centre is considered to have a high environmental quality.
Customer Views and Behaviour	Those respondents to the NEMS Household Survey who identified that they visit Abbots Langley the most, were asked what they like the most. 31.2% responded with the fact that they liked that the centre was small, quiet or not too big, and 35.9% identified that it is close to home.
Stakeholder Feedback	No stakeholder responses were received for Abbots Langley.

Chorleywood
Three Rivers District Centre

Description	Located on the western edge of Three Rivers District Council, Chorleywood is a small town centred around a high street and railway station. There is limited employment in Chorleywood and the majority of the workforce commute either into London or to Watford, Uxbridge or Slough. The centre serves the needs of the local population and is well used. It finds a good balance between providing for visitors by car and pedestrians and there is some parking available within the centre both on road and in small car parks. The parade of shops in the northern part of the District Centre focus on provision of convenience shopping and leisure services with a growing café culture.
Current Status	District Centre



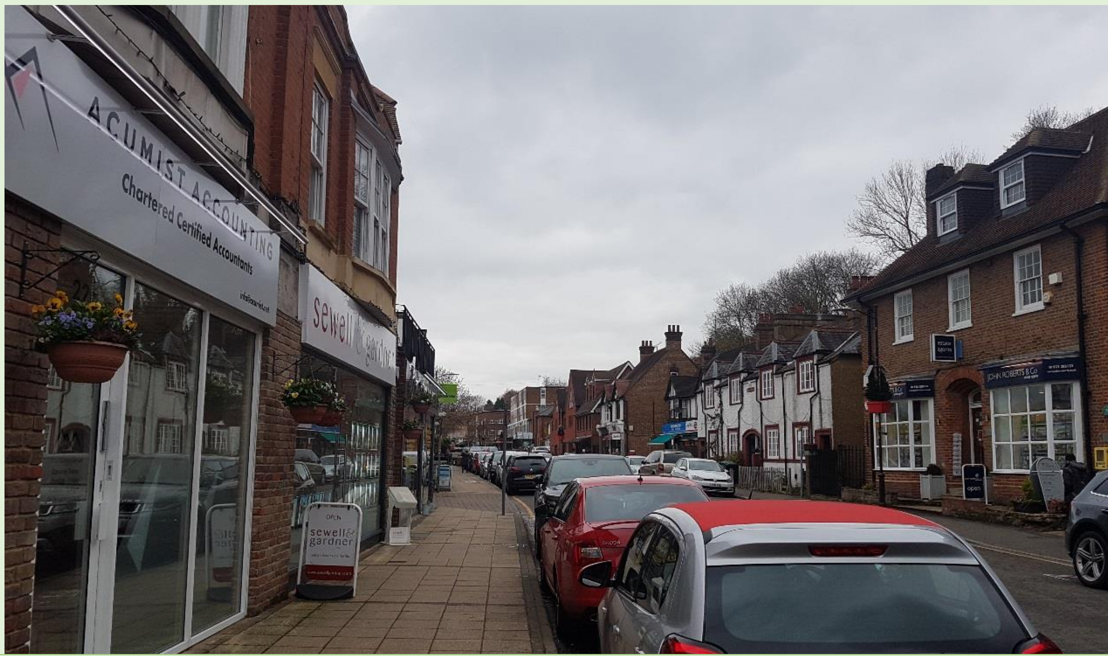


Table C.13 District Centre Composition

Chorleywood	Units (%) 2012	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	20.4	16.1	8.8	19.0	15.2
Comparison	31.5	33.9	31.0	30.9	34.9
Retail Services	24.1	17.9	14.5	14.8	6.8
Leisure Services	12.9	17.9	23.9	18.5	25.0
Financial and Business Services	7.4	5.4	10.3	5.2	7.7
Other Retail	0.0	0.0	0.1	0.0	0.1
Vacant	3.7	8.9	11.2	11.7	9.8
TOTAL	100	100	100	100	100

Source: Lambert Smith Hampton, 2012 and Experian, 2017

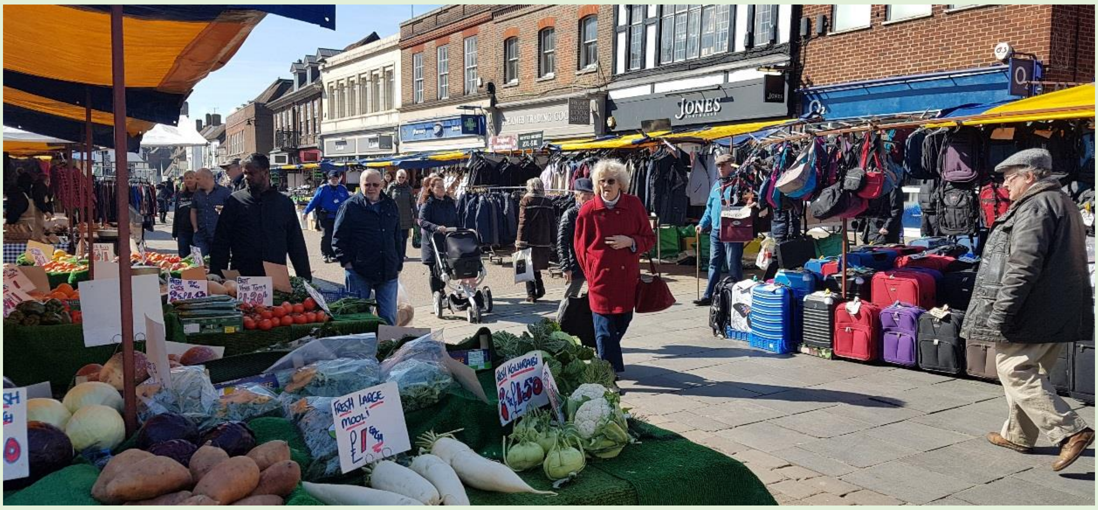
Overall Composition	At the time of the Nexus site visits in November 2017, 56 units were identified in Chorleywood based on Experian's Goad categorisation methodology. Chorleywood District Centre is divided by Shire Lane. The northern section has a densely concentrated village feel, while the southern section is more linear and extended. The Primary Shopping Frontage is located at Whitelands Avenue, just north of Shire Lane, and further south along Lower Road. Overall, the District Centre composition is quite similar to the UK average when considering units. Since 2012 when the previous Retail Study was undertaken, Chorleywood has seen a reduction in the number of convenience units (20.4% to 16.1%), retail services units (24.1% to 17.9%) and financial and business services units (7.4% to 5.4%), and an increase in the number of leisure services (12.9% to 17.9%). It has also seen a slight increase in the number of vacancies from 3.7% to 8.9%. As illustrated in Figure 4.5 in Chapter 4 of this retail study, the total retail floorspace in Chorleywood is 2,135 sq m, the second lowest of all centres in the Study Area.
Convenience & Comparison	Since the 2012 Retail Study was completed, there has been a reduction in the number of convenience units from 11 to 9, although this is still higher than the UK average when considering proportion of overall units (15.7% compared with 16.1%).

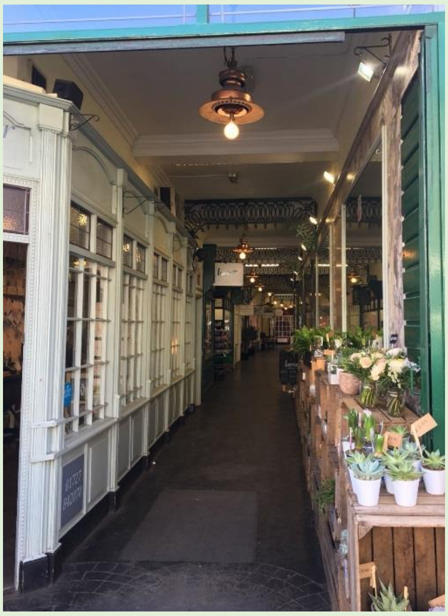
	Over the same period, the proportion of comparison units has remained very similar. Both the convenience and comparison offers within the town comprised a high proportion of independent shops. No Major Retailers were present within centre at the time of the Nexus site visits. At the time of the Nexus site visits there were two charity shops located within Chorleywood.
Services	Since the previous Retail Study was completed in 2012, there has been a reduction in the proportion of retail services and an increase in the number of leisure services. The increase in leisure services in particular, is a reflection of the general trend of the growing market for cafes, restaurants and other leisure services within town centres. The amount of leisure floorspace within the District Centre is still below the UK average (18.5% compared with 25.0%). In addition, Chorleywood was found to have a low proportion of financial and business services (5.4%) compared with the UK average (10.3%). This is further evidence of Chorleywood's role within the sub-region as a District Centre with a focus on convenience and leisure rather than administration and business. In terms of evening economy (restaurants, takeaways, bars and pubs) Chorleywood had one of the lowest proportions of those units of the centres surveyed (8.9%).
Vacancies	Since 2012 there has been an increase from 2 to 5 vacant units representing 8.9% of units. This is below the UK average of 11.2%.
Rents	From reviewing available online sources and notwithstanding the attraction of specific locations across the town centre due to the close proximity to certain facilities, the average rent for retail units in Chorleywood Town Centre is circa £25.00 psf. **Source**:https://www.zoopla.co.uk/to-rent/commercial/property/chorleywood/
Pedestrian Flows	Pedestrian flows were observed to be stronger in the northern, village-like section of Chorleywood. At the time of the Nexus site visits there were a number of busy cafes in this part of the centre. Unfortunately, the busy Shire Lane divides the centre, and acts as a pedestrian barrier to the southern part of the district centre, where there was less pedestrian traffic.
Accessibility	Chorleywood has a railway station which operates London Underground Metropolitan Line services as well as Chiltern Railway services. Of respondents to the NEMS Household Survey who identified that they visit Chorleywood the most, 53.2% identified that they usually travel by car, while 45.6% identified that they usually walk into the district centre.

	The Ferry Car Park, a short stay and business permit holders car park is located at the southern end of the district centre and has 75 spaces, while there is also a privately run car park near the railway station which has a total of 238 spaces.
Perception of Safety	No anti-social behaviour was observed throughout the Nexus site visits. CCTV cameras were observed throughout the centre.
Environmental Quality	Chorleywood District Centre, and particularly the northern part around Whitelands Avenue, was observed to be a high quality urban environment.
Customer Views and Behaviour	82.4% of respondents to the NEMS Household Survey who stated that they visited Chorleywood the most, stated that they visited Chorleywood more than once a week. This is testimony to Chorleywood's village-like atmosphere. When asked what they like most about Chorleywood District Centre, 42.6% of respondents stated that it is close to home, while 12.9% responded with 'familiarity'.
Stakeholder Feedback	Stakeholder responses received from Chorleywood Parish Council considered the centre has a particularly high representation of cafes. The street environment is positive, however there is a feeling of separation between the main parade and Lower Road. The centre is reliant on car travel but parking is limited.

St Albans
St Albans City and District Council

Description	St Albans is identified as a Minor Sub Regional Centre in the St Albans City and District Local Plan and is the principal shopping destination serving St Albans City and District Council.
Current Status	Minor Sub Regional Centre





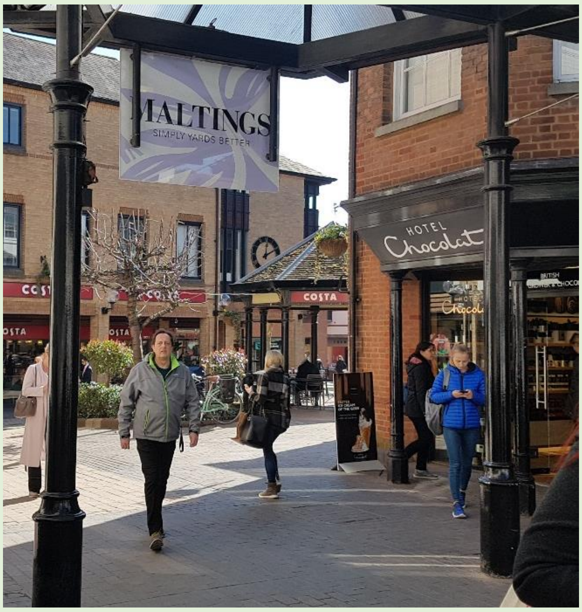


Table C.14	*Town Centre Composition*					
St Albans	**Units (%) 2005**	**Units (%) 2008**	**Units (%) 2017**	**Units UK Avg. (%)**	**Floorspace (%) 2017**	**Floorspace UK Avg. (%)**
Convenience	4.0	4.8	4.1	8.8	3.2	15.2
Comparison	51.8	51.3	38.5	31.0	46.4	34.9
Retail Services	39.9*	34.2*	14.7	14.5	6.1	6.8
Leisure Services	*	*	22.9	23.9	27.2	25.0
Financial and Business Services	*	*	12.6	10.3	9.6	7.7
Vacant	4.3	7.0	7.1	11.2	7.6	9.8
TOTAL	100	100	100	100	100	100

**Figure represents all services (retail services, leisure services and financial and business services)*
Source: 2005 and 2008 figures from St Albans City and District Council 2009 Retail Study – Update and 2017 figures are from Experian Goad Category Report 2017

Overall Composition

At the time of the Nexus site visits there were 436 units within St Albans Town Centre. This is an increase from 2005 and 2008 where there were 371 units and 398 units, respectively.

St Albans City's shopping offer is mainly concentrated around St Peters Street/ Market Place, The Maltings shopping precinct and Christopher Place.

St Albans is made up of a mixture of independent and national multiples and has 20 of the 31 Major Retailers present within the centre (as identified by Experian – 2017).

The total retail floorspace for St Albans, as outlined in Table 4.5 of Chapter 4, is 71,990 sq m, the third highest after Watford and Hemel Hempstead.

Convenience & Comparison	At 4.1%, representation of convenience units is significantly below the UK average of 8.8%. St Albans convenience offer has remained consistently low since 2005. Unlike Harpenden, there are no large supermarkets within St Albans City Centre and the largest convenience store is Tesco Metro, located on St Peters Street (1,020 sq m). The NEMS household survey results indicated that residents of Zone 18 are more likely to visit Tesco Metro to undertake 'top up' shopping (14.3%) rather than their main food shop (2.8%). The NEMS household survey indicated that (after Tesco Metro), Marks & Spencer is the second most popular convenience store within the city centre, with 2.0% of respondents (from Zone 18, the zone St Albans is located within) carrying out their main food shop there. The NEMS household survey results indicate that the most popular supermarket for residents of Zone 18 is Morrison's on Hatfield Road, closely followed by Sainsbury's on Everard Close, where 29.7% and 25.1% of residents, respectively, carried out their last main food shop. Both of these supermarkets are located outside the city centre. As previously noted, there are a significant number of National Multiples located within the city centre, with the prime comparison offer located at The Maltings. The NEMS household survey results indicated that 37.0% of respondents residing in Zone 18 last visited St Albans to carry out shopping for clothing and footwear goods. Whilst the NEMS household survey asked a number of questions relating to a variety of comparison goods sectors (including household goods, recreational goods, beauty products, electrical items and bulky goods) clothing and footwear is considered to be a reliable indicator to demonstrate comparison shopping patterns. At 38.5%, representation of comparison units is above the UK average of 31.0%. However, this has reduced quite significantly since 2008 where representation was 51.3%. Notably, the centre does not have a department store to anchor its comparison offer, representing a gap when compared against larger competing centres in the sub region such as Hemel Hempstead and Watford. This is reflected in the NEMS household survey results where 8.8% of respondents in Zone 18 said they would like to see a department store opened in the city centre. A reduced comparison offer within the city centre may reflect a lack of larger retail units and the close proximity of Colney Fields Shopping Park which includes a number of large floor plate retail units. The St Albans Street Market which takes place every Wednesday and Saturday, running the full length of St Peters Street, is an established market with stalls selling a range of goods including food, gifts, clothes and household items. At the time of the Nexus site visits, the market was very busy creating a particularly vibrant and bustling atmosphere throughout the centre. The markets popularity was reflected in the NEMS household survey results where 9.8% of respondents in Zone 18 said they visited the centre because of its 'good markets'. There are a total of 8 charity shops within St Albans which are distributed fairly

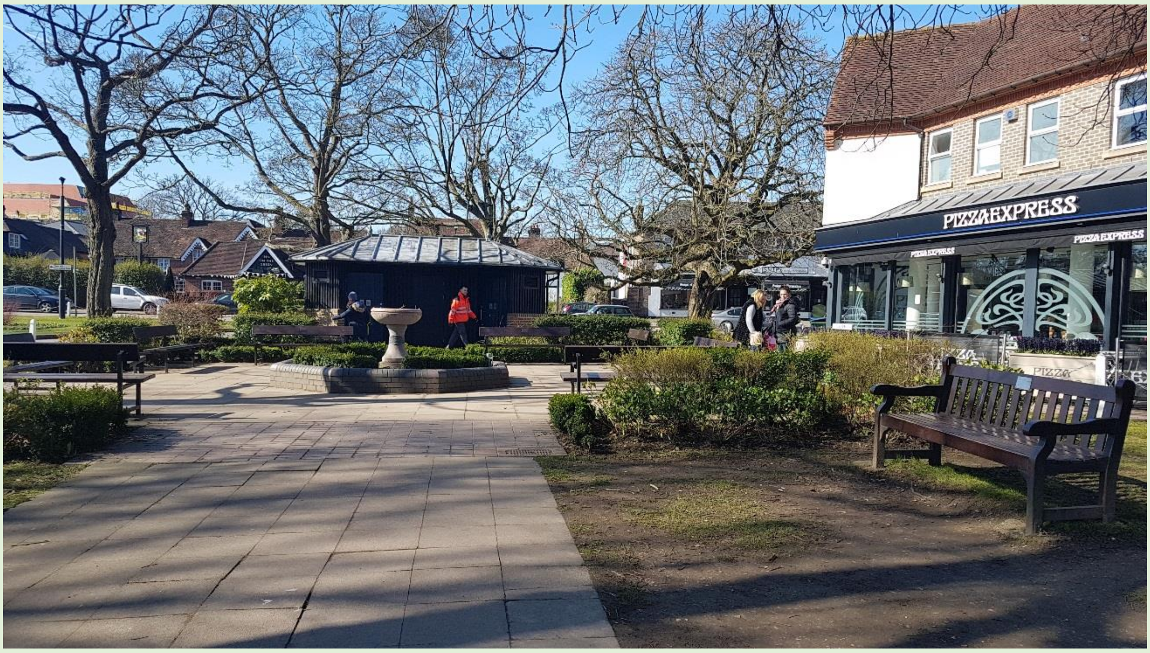
	evenly throughout the town centre.
Services	Since 2008, the overall representation of service units has increased from 34.2% to 50.2%. This reflects wider national trends and the decreased representation of comparison units. At 22.9% representation of leisure services within St Albans is just below the UK average of 23.9%. However, there is a particularly strong representation of food and drink units which make up 91% of all leisure services. Representation of leisure floorspace (27.2%) is above the UK average of 25.0%, reflecting the larger floor plate of a number of restaurants and public houses in the city centre. There is a strong representation of financial and business services within the centre which is above the UK average. There are 65 units that currently contribute to the evening economy (made up of bars, restaurants, takeaway, pubs or night clubs). This equates to 14.9% of overall retail representation of the centre.
Vacancies	The representation of vacant units has seen a marginal increase since 2008, and at 7.1%, is currently below the UK average of 11.2%.
Rents	Notably, rents vary throughout St Albans Town Centre and are much higher in the Maltings Shopping Precinct (up to circa £43.00 psf) going down to circa £22.00 psf along the secondary retail streets (Holywell Hill) **Source:** https://propertylink.estatesgazette.com/property-details/6325483-21-holywell-hill-st-albans-al1-1ez and https://propertylink.estatesgazette.com/property-details/6313573-25-high-street-st-albans-herts-al3-4eh and https://propertylink.estatesgazette.com/property-details/6327427-under-offer-10-holywell-hill-st-albans-al1-1bz
Pedestrian Flows	At the time of the Nexus site visits, the highest pedestrian flows were witnessed along St Peters Street, particularly due to the street market activity. High pedestrian flows were also witnessed around the Maltings where the prime comparison retail pitch is located. Pedestrian flows were notably lower along the Secondary Shopping Frontages off St Peters Street, Market Place, Chequer Street and the High Street.
Accessibility	St Albans is easily accessible via car from the M1, A1 and M25. The following car parks are located within the town centre; • London Road – 210 spaces (paid parking) • The Maltings Centre – 800 spaces (paid parking) • Bricket Road – 25 spaces (paid parking) • Civic Centre – 302 spaces (paid parking)

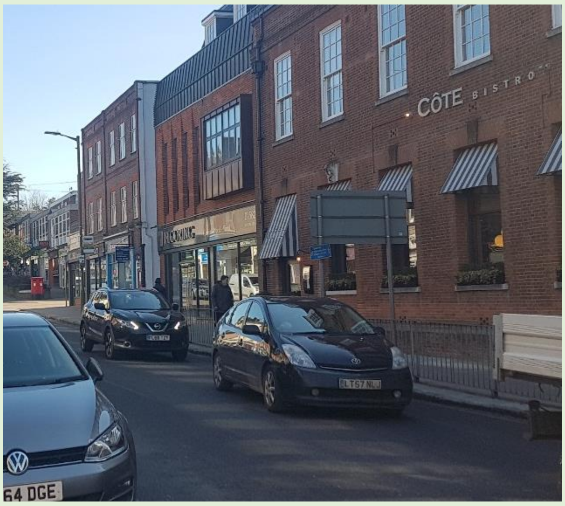
	• Bricket Road North – 27 spaces (paid parking) • Adelaide Street – 30 spaces (paid parking) • Drovers Way – 351 spaces (paid parking) • Marks and Spencer – 40 (paid parking) • Russel Avenue – 537 spaces (paid parking) • Gombards – 82 spaces (paid parking) • Christopher Place – 180 spaces (paid parking) At the time of the Nexus site visits there was capacity in the majority of the car parks. Unsurprisingly, the NEMS household survey results indicated that the majority of respondents, visiting St Albans, travelled by car (73.9%), followed by 14.7% who walk. St Albans City Train Station is located to the east of the city centre where regular Thameslink services run into central London. The station is however fairly disconnected and approximately a 15 minute walk from the city centre. St Albans Abbey Railway Station is located to the south of St Albans. Although slightly closer to the city centre, services are more limited, with journeys into London requiring a change at Watford Junction.
Perception of Safety	At the time of the Nexus site visits, the centre had a safe ambiance and CCTV was evident throughout.
Environmental Quality	On the whole, the environmental quality of St Albans appeared fairly strong with street furniture evidenced throughout the centre. The tree lined pavements of Chequer Street create a particularly welcoming atmosphere. The main shopping streets would benefit from enhanced seating areas, encouraging visitors to congregate and increasing the vitality throughout the centre. St Albans 'Public Realm Delivery Strategy Document' which includes planned improvements to the public realm and street scene of the city centre was adopted in 2011. It is noted that these improvements are still being carried out throughout the centre. St Albans role as a Cathedral City is particularly evident and reflected in the environmental quality of the centre which has a strong cultural offer. Other than St Albans Cathedral, tourist attractions include; the Verulamium Museum, St Albans Museum and the traditional markets. All these cultural offers provide a draw to the city centre.
Customer Views and Behaviour	The NEMS household survey indicated that, out of residents residing within Zone 18, 74% visit St Albans City Centre the most. When asked what they like most about the centre, 23.4% of respondents (who visit St Albans the most) said it was because it is 'close to home' and 12.3% of respondents said it was due to the 'choice and range of shops' reflecting the strong comparison offer in the city centre.

	Notwithstanding this, when asked what would encourage them to visit the centre more often, 12.5% of respondents said an 'increased choice and range of shops'.
Stakeholder Feedback	Stakeholder feedback was received from the BID Manager. Feedback is outlined below. On the whole, there are not enough large units within the town centre which appeal to national multiples. Accessibility is often an issue (particularly for delivery vehicles) due to the medieval layout of the roads. St Albans is perceived as a safe city centre. There is an opportunity to improve the clock tower area and linkages between Alban Arena and St Peter's Street. Technology improvements to the City Centre will be encouraged. Bus links could be improved but the centre has strong access via foot. The retail composition is perceived to be strong with a good mix of independent and chain stores. There is potential to improve the evening economy but there is a good mix of local events attracting visitors to the city, particularly the local markets. The public realm is generally good however more planting would be welcomed. Signage could also be improved throughout the centre.

Harpenden
St Albans City and District Council

Description	Harpenden is the second largest settlement in St Albans District located between Luton (to the north) and St Albans (to the south). Strong transport links into London makes Harpenden a popular commuter town. Harpenden Town Centre is predominantly linear with the primary shopping offer located along the High Street.
Current Status	Minor District Centre





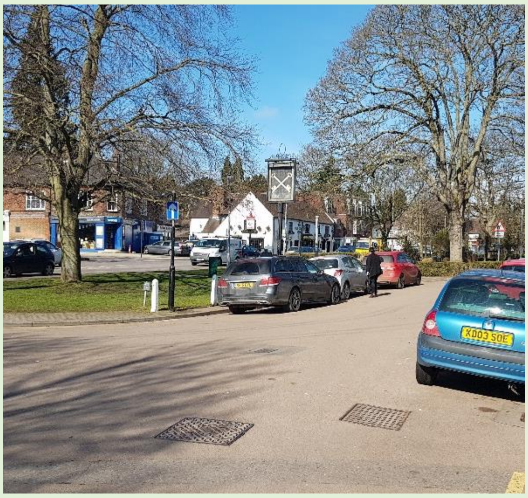


Table C.15 Town Centre Composition

Harpenden Town Centre	Units (%) 2000	Units (%) 2006	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	8.1	6.2	8.1	8.8	22.1	15.2
Comparison	46.8	44.9	26.7	31.0	22.0	34.9
Retail Services	42.8*	45.5*	19.0	14.5	10.6	6.8
Leisure Services	*	*	23.3	23.9	24.3	25.0
Financial and Business Services	*	*	13.8	10.3	14.5	7.7
Vacant	1.7	2.3	9.0	11.2	6.6	9.8
TOTAL	100	100	100	100	100	100

**Figure represents all services (retail services, leisure services and financial and business services)*
Source: 2000 and 2006 figures are from St Albans City and District Council Retail Study – Update 2009, 2017 figures are from Experian Goad Category Report 2017.

Overall Composition	Since the 2006 survey, the number of retail units has increased from 178 to 210. The Primary Retail Frontage within Harpenden Town Centre is located along the High Street. A number of Secondary Retail Frontages branch off the High Street including Station Road, Vaughan Road and Leyton Road. The total retail floorspace in Harpenden Town Centre, as illustrated in Figure 4.5 of Chapter 4, is 26,460 sq m.

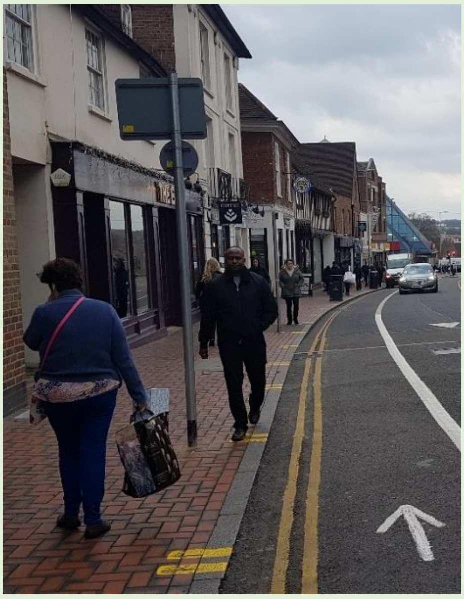
Convenience and Comparison	At 8.1% of units, Harpenden's convenience offer is in line with the UK average (8.8%). The anchor convenience stores include Sainsbury's (which, at 2,270 sq m is the largest convenience store in the town centre) and Waitrose (1,480 sq m). Both these stores are located in the middle of the town centre with their own allocated parking. The representation of convenience floorspace within Harpenden (22.1%) is above the UK average of 15.2%, reflecting the larger size of these two town centre supermarkets. The NEMS household survey results indicated that the majority of respondents in Zone 21 (the zone Harpenden is within) carry out their main food shop at Sainsbury's – 40.4%. Waitrose is the second most popular food store, with 24.1% of respondents visiting the store for their main food shop. The NEMS household survey results indicated that the most popular store to carry out 'top up' shopping was the Co-op on Southdown Road, outside of the town centre – 29.5%. Representation of comparison units (26.7%) within Harpenden is below the UK average of 31.0% and has reduced since 2005. The comparison offer within the town centre is made up of a mixture of independent units and National Multiples. The NEMS household survey results indicated that residents within Zone 21 (the zone Harpenden is within) are most likely to visit St Albans to buy clothing and footwear – 32.7%. Only 6.7% of residents last purchased these items in Harpenden Town Centre. This is unsurprising and reflects Harpenden's complementary role to St Albans which has a stronger comparison offer. Whilst the NEMS household survey asked a number of questions relating to a variety of comparison goods sectors (including household goods, recreational goods, beauty products, electrical items and bulky goods) clothing and footwear is considered to be a reliable indicator to demonstrate comparison shopping patterns. There are a total of ten charity shops located within Harpenden Town Centre, four of which are located at Harding Parade, two on Bowers Parade, three on the High Street and one on Station Road.
Services	The representation of retail services (19.0%) within Harpenden Town Centre is above the UK average of 14.5%. The representation of leisure service units (23.3%) is in line with the UK average (23.9%), reflecting Harpenden Town Centre's established evening economy. This is predominantly due to the plethora of restaurants, takeaway units, cafes and public houses, which equate to 46 of the 49 leisure services within the town centre. The growing competition between leisure services throughout the town centre is particularly evident with the closure of Strada in December 2107 due to 'disappointing trading in an increasingly competitive market' and will need to be monitored by the Council going forward. Notwithstanding the above, the representation of leisure floorspace (24.3%) is slightly below the UK average (25.0%), reflecting the smaller size of units within Harpenden Town

	Centre. There is a strong representation of Financial and Business Services within the Town Centre (13.8%) which is above the UK average (10.3%) and includes six banks. There are 34 units in the town centre that make up either pubs, bars, restaurants or takeaways, equating to 14.2% of the centres overall representation of units.
Vacancies	At 9.0%, vacancy levels within the town centre are below the UK average (11.2%). There is a notable healthy 'churn' of vacancies and a number of units have recently been taken up, including Cote Bistro which has recently occupied the old Post Office on Station Road. The representation of vacant units has increased from 2.3% in 2006 to 9.0% in 2017.
Rents	Although online data was limited for Harpenden, on average retail rents appear to be higher than St Albans reaching up to £67.00 psf. **Source:** https://propertylink.estatesgazette.com/property-details/6307531-104-high-street-harpenden-al5-2sp
Pedestrian Flows	At the time of the Nexus site visits, the highest pedestrian flows were witnessed along the High Street, particularly to the south. Moderate footfall was also witnessed along Station Approach which is likely to reflect movements to and from the station. Notably, less footfall was witnessed along the Secondary Frontages of Vaughn Road and Leyton Road, although Waitrose attracted a fair amount of pedestrian activity.
Accessibility	The town centre has particularly strong public transport links with Harpenden Train Station, located to the south east of the town centre, providing direct links to Central London and Luton airport via Thameslink rail service. Bus services also provide links to surrounding towns including St Albans, Welwyn Garden City and Berkhamsted. The town centre is accessed by motor vehicle from the A1087 off the M1 and has six car parks including; • Bowers Way East – 148 spaces (paid parking) • Bowers Way West – 158 spaces (paid parking) • Waitrose – 130 spaces (free for customers) • Amenbury Lane – 206 spaces (paid parking) • Leyton Road – 23 spaces (free parking) • Harpenden Station – 420 spaces (paid parking) At the time of the Nexus site visits there were limited parking spaces available. This was reflected in the NEMS household survey results where 31.4% of respondents said that more parking would encourage them to visit the town centre more often and possibly flags an issue with town centre parking in Harpenden. When asked how they travel to Harpenden, 65% of respondents to the NEMS household survey (who visit Harpenden the most), said that they would normally travel by car. Compared to other centres within the Study Area, a high percentage travel to the centre by foot (27.8%) reflecting the close proximity of surrounding residential units.

	The centre is pedestrian friendly with numerous pedestrian crossings and slowing traffic along the High Street.
Perception of Safety	At the time of the Nexus site visits, the centre had a safe ambience. The plethora of seating areas, including tables spilling out from restaurants and cafes, encourage natural surveillance. CCTV is located throughout the town centre and Harpenden's healthy evening economy provides a safe ambiance into the night.
Environmental Quality	Harpenden Town Centre has a particularly high environmental quality. Numerous greens and planting are located throughout the centre, providing a welcoming and pleasant environment. Seating areas and benches also encourage pedestrians to gather, increasing the vitality of the centre. There are a number of small shopping avenues off the main High Street including Thompson Close and The Leys which appear underutilised and lack vitality.
Customer Views and Behaviour	When asked what they like most about the centre, 36.2% of respondents said it was its 'proximity to home' whilst 12.3% said 'the choice and range of shops' closely followed by 'the centre being small/ quiet/ not too big' – 9.7%. The compact nature of the centre means it offers more of a village feel whilst boasting the benefits of a healthy choice of shops. As previously mentioned, parking appears to be the residents biggest concern within the centre, with 31.5% of respondents wanting to see more spaces made available. 11.0% of residents would like to see an increased general range if shops and 8.8% cheaper parking.
Stakeholder Feedback	*Nexus Planning await response from Stakeholders*

Watford
Watford Borough Council

Description	Watford Town is a regional shopping location at the northern edge of the Greater London conurbation. Watford Town Centre is oriented along a long, linear High Street which runs southeast to northwest. The Intu Shopping Centre, which is spread over two floors, anchors the south of the High Street.
Current Status	Town Centre



NEXUS PLANNING

Table C.16 Town Centre Composition

Watford Town Centre	Units (%) 2009	Units (%) 2012	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	5.5	5.1	6.9	8.8	8.4	15.2
Comparison	40.7	41.3	35.3	31.0	42.5	34.9
Retail Services	40.9*	10.5	10.0	14.5	3.9	6.8
Leisure Services	*	21.2	27.1	23.9	26.9	25.0
Financial and Business Services	*	10.5	11.0	10.3	5.8	7.7
Vacant	12.9	11.4	9.7	11.2	12.5	9.8
TOTAL	100	100	100	100	100	100

**Figure represents all services (retail services, leisure services and financial and business services)*
Source: 2009 figures are from Watford Retail Study 2010, 2013 figures from Watford Retail Study Update 2012 and 2017 figures are from Experian Goad Category Report 2017

Overall Composition	Since 2012 the overall number of retail units has decreased from 429 – 391, reflecting the redevelopment that is currently underway throughout the town centre. Watford Town Centre Boundary, as identified in the Watford District Plan Proposals Map (2000), is bordered by the A411 to the north east and south whilst Exchange Road runs along the south west border meeting Rickmansworth Road to the north. The Prime Retail Frontage is located along the High Street between Exchange Road and Kings Street and includes the Intu Shopping Centre. Secondary Retail Frontages are located to the north of the High Street, past Exchange Road and on a number of smaller roads branching off the main High Street including; Clarendon Road, Market Street, Queens Road and Kings Street. The south of the High Street beyond Kings Street is also a Secondary Frontage. As illustrated in Figure 4.5 in Chapter 4 of this retail study, the total retail floorspace in Watford Town Centre is 114,380 sq m, the highest of all centres in the Study Area.

Convenience and Comparison	The convenience offer is under-represented in the town centre (currently 6.9%) when compared to the UK average (8.8%). However, the number of units has increased by 3 since the 2012 study. The anchor convenience stores include Sainsbury's (which at 5,340 sq m is the largest retail unit in the town centre) and Iceland. Currently its location to the north east of the town centre, separated by Gaumont Approach and St Albans Road, means Sainsbury's appears fairly separated from the town centre. The low representation of convenience units is likely to reflect the presence of the large convenience superstores surrounding Watford Town Centre; including Tesco Extra located at Waterfield Retail Park, which is open 24 hours a day from Monday – Saturday. The NEMS Household Survey results indicated that the majority of respondents (23.4%) residing in Zone 1 (the Zone Watford Town Centre is within) carry out their main food shop at Tesco. The out-of-town Morrison's located on Ascot Road was the second most popular convenience store, with 15.4% of respondents visiting the store for their main food shop. At 35.3%, comparison goods representation is above the UK average of 31.0%. Comparison floorspace is also particularly high at 42.5%, (above the UK average of 34.9) reflecting the larger size of units. There is a strong representation of National Multiples within the centre which is unsurprising considering Watford's status as a Major Regional Centre (Venuescore 2015/16 ranking). The majority of these units are located along the Prime Retail Frontage at the High Street or within the Intu Shopping Centre. The strong comparison representation in Watford Town Centre is reflected in the NEMS Household Survey results which indicate that 24.6% of the whole study area last bought their clothing or footwear in Watford Town Centre. Of those respondents that reside in Zone 1 (the zone Watford Town Centre is location within), 81.9% carried out there last shop for clothing and footwear in the centre. At the time of the Nexus Retail Study there were 9 charity shops located within the town centre, the majority of which are located at The Parade.

Services	Retail services have seen a decrease in units since 2012. At 10.0% representation is below the UK average of 14.5%. This is likely to reflect the reliance on smaller local centres (Watford North) for retail service provision. Representation of leisure service units (27.1%) and financial and business services (11.0%) are both above the UK average (23.9% and 10.3% respectively). The presence of takeaway units and cafes currently dominates the leisure service sector within the town centre. Although there are a number of night time leisure uses to the north of the centre (including bars and night clubs) the centre would benefit from more complementary leisure services, including restaurants, to encourage activity between the normal retail hours and night time hours. This sector will be boosted from the new Intu redevelopment which includes a new multi-screen cinema and numerous restaurants with the aim to create a more family friendly atmosphere within the town centre. A total of 65 units within the town centre are restaurants pubs, nightclubs or takeaway units equating to 16.7% of the town centres overall retail representation. The majority of the units that make up Watford's evening economy are located north of Exchange Road. The Colosseum and Watford Palace Theatre also contribute to the evening economy within the Town Centre.
Vacancies	Despite the development that is currently underway within the town centre, at 9.7%, the representation of vacant units is below the UK average of 11.2%. At 12.5%, vacant floorspace is above the UK average of 9.8%. This reflects the larger size of a number of vacant units within the town centre, particularly the former BHS which is 3,730 sq m.
Rents	The retail rents in Watford vary throughout the town centre with the highest rents being evident in the Intu Shopping Centre (circa £100.00 psf) reflecting its prime retail pitch. Lower rents are witnessed along the High Street (circa £35.00 psf). **Source:** http://www.shopproperty.co.uk/shops/Watford
Pedestrian Flows	At the time of the Nexus site visits, the highest pedestrian flows were witnessed along the south of the high street and within the Intu Shopping Centre which offers the prime retail pitch. The street market located along the pedestrianised area of the High Street was very busy providing a bustling feel to the town centre. In comparison, Watford New Market, an indoor market which was built to replace the original indoor market, had very low footfall and appeared underutilised. This is likely to be attributed to its location off the main High Street as well as the competition of the popular High Street Market. The Secondary Shopping Frontages along Kings Street and Market Street had lower daytime footfall.
Accessibility	The town centre is located within the bounds of the M25 with good access via car. At the time of the Nexus site visits there was a lot of traffic on the roads surrounding and

within the town centre. When asked how they travel to Watford, 83.9% of respondents to the NEMS Household Survey said that they would normally travel by car (as either driver or passenger).

Congestion was witnessed on roads surrounding town centre including the contra flow lane at the south of the Intu which, at the time of the Nexus site visits was blocked by parked/ waiting vehicles.

Watford Town Centre has a total of 9 car parks (both short term and long term) including;

- The Crescent – 10 spaces (paid parking)
- Intu Kings Car Park – 764 spaces (paid parking)
- Intu Queens Car Park – 657 spaces (paid parking)
- Church Car Park – 601 spaces (paid parking)
- Intu Watford Palace Charter – 619 spaces (paid parking)
- Sutton Car Park – 490 spaces (paid parking)
- Gade – 661 spaces (paid parking)
- Town Hall – 150 spaces (paid parking)
- The Avenue – 119 spaces (paid parking)

The price of car parking is thought to deter a number of visitors as, when asked what measure would encourage them to visit the centre more often, 12.3% of respondents said cheaper parking. A number are open for 24 hours reflecting the evening economy within the town centre.

Despite the pedestrianisation of the north of the High Street, the town centre, as a whole, is not very pedestrian friendly with congested roads through the town centre making the town difficult to navigate. This is evidenced in the NEMS Household Survey results, where only 5.8% respondents said that when visiting Watford Town Centre they would normally walk.

Cycle paths are located throughout the town centre.

The centre benefits from two over ground stations (Watford Junction, Watford High Street and) and Watford Tube Station (Metropolitan Line) which all provide regular services into Central London. The train stations however appear fairly disconnected to the main town centre which is exacerbated by poor signage.

A bus terminus is located just outside of Watford Junction Station.

Perception of Safety

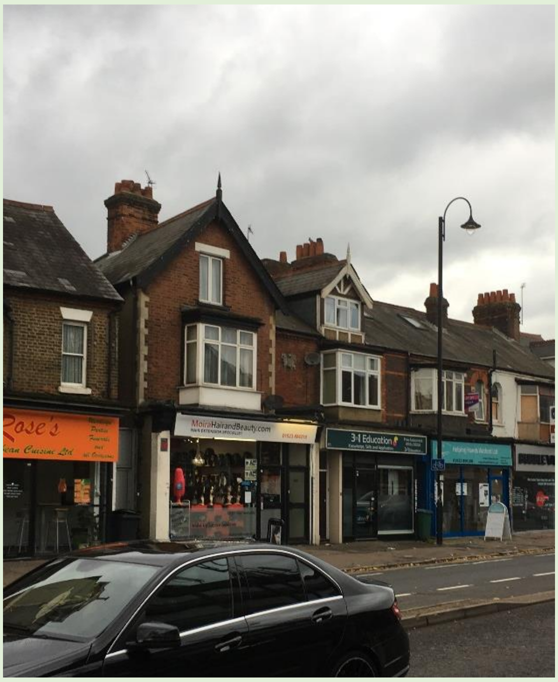
At the time of the Nexus site visits, the centre had a fairly safe ambience, particularly to the south of the centre.

The north of the centre which includes a number of clubs, pubs and bars, has the potentially to encourage antisocial behaviour at night. Although this encourages active surveillance late at night, the addition of more restaurants would help to balance the

	town centre experience, providing a more family friendly environment. Numerous underpasses also promote an unwelcoming environment for pedestrians.
Environmental Quality	The town centre appears to be split into two halves, the northern half is pedestrianised and includes street furniture and seating which encourages people to gather in this area. A number of bars pubs and clubs are also located in this area that offers a strong night time economy. The southern half, which is pedestrianised, includes the Intu and offers the prime retail pitch. Signposting in general is considered to be poor, particularly in relation to transport connectivity to and from car parks and public transport. Public realm improvements are currently underway in the town centre between Clarendon Road and St Marys Square. This will include shared space, improved lights, CCTV with the aim to provide a more welcoming pedestrian environment. The development will start in March 2018, with the aim to be completed in-line with the Intu redevelopment.
Customer Views and Behaviour	Watford is the most visited town centre in the whole study area with 65% of all respondents to the NEMS Household Survey visiting the centre most often. In relation to Zone 1, (the zone Watford is located within), The NEMS Household Survey identified that 71.5% of respondents visit Watford Town Centre the most with the majority of respondents (22.9%) visiting at least once a week.
Stakeholder Feedback	Stakeholder feedback was received from the Watford BID, the Watford and West Herts Chamber of Commerce, the Federation for Small Businesses and the Intu Shopping Centre Manager. There is considered to be a strong mix of units and, in general, there is very positive feedback in relation to the impending Intu redevelopment. However, there is slight concern as to how the new Intu redevelopment will impact restaurants to the north of the centre. It is noted that improvements could be made to the accessibility of the centre. The numerous underpasses are unwelcoming and signage is poor, particularly to and from Watford Junction Station. There is a strong night time economy due to the numerus pubs and clubs, particularly to the north of the centre. However, the centre is not very family friendly in the evening and can appear disconcerting at night. This is exacerbated by the number of roller shutters on shop fronts. It is recognised that Watford New Market has been unsuccessful and suffers from low footfall, however the street market is thriving and pitches are very popular.

North Watford - St Albans Road
Watford Borough Council

Description	North Watford is identified as the only District Centre within Watford Borough. The linear district centre, predominantly made up of small shopping frontages, is located on St Albans Road between Watford Town Centre and Garston, north of Watford Junction Railway Station.
Current Status	District Centre



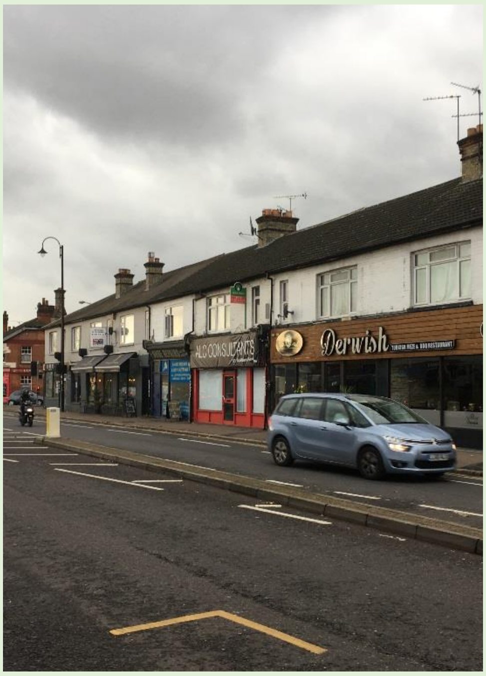


Table C17 District Centre Composition

North Watford	Units (%) 2011	Units (%) 2017	Units UK Avg. (%)	Floorspace (%) 2017	Floorspace UK Avg. (%)
Convenience	13.8	12.6	8.8	7.9	15.2
Comparison	25.0	23.3	31.0	46.0	34.9
Retail Services	46.3*	18.0	14.5	12.2	6.8
Leisure Services	*	23.8	23.9	19.6	25.0
Financial and Business Services	*	12.1	10.3	7.0	7.7
Vacant	14.8	10.2	11.2	7.3	9.8
TOTAL	100	100	100	100	100

**Figure represents all services (retail services, leisure services and financial and business services)*
Source: 2011 figures from Watford Retail Study Supplementary Report 2011 (a supplementary report produced to broadly examine the neighbourhood centres and local centres across the Borough) and 2017 figures are from Experian Goad Category Report 2017

Overall Composition	At the time of the Nexus site visits, North Watford District Centre had 206 retail units in total. The heath check assessments are based on the Experian Goad Plans which include a number of units located outside of the District Centre Boundary (outlined in the Watford Proposals Plan) and includes a number of local shopping parades both to the north and south of the identified Shopping Centre. For this reason, there may be discrepancies in the number of town centre units when compared with previous studies. As identified in the Watford District Plan Proposals Plan, North Watford Shopping Centre is located between Leavesden Road to the south and Balmoral Road to the north. There was a notably high turnover of retail units throughout the centre. This is expected in a district centre such as North Watford which is made up of predominately independent stores and reflects a healthy centre attracting plenty of interest from new retailers. As illustrated in Figure 4.5 in Chapter 4 of this retail study, the total retail floorspace in Watford North is 32,290 sq m.
Convenience & Comparison	The representation of convenience units at 12.6% is above the UK average of 8.8%. However, convenience floorspace (7.9%) is below the UK average (15.2%) illustrating the smaller size of convenience units which mainly

	comprise independent stores that are likely to be relied on for 'top up shopping'. At 2,500 sq m, the Co-op is the largest convenience store in the district centre. There is a large Asda and Sainsbury's superstore located just north of the district centre which people are more likely to use for their main food shop. This is illustrated in the NEMS Household Survey results where 49.1% of respondents residing in Zone 2 (the zone North Watford is located within) said they last visited Asda for their main food shop. There are a diverse range of independent cultural food shops creating a niche draw to the local centre from varied ethnic communities. At 23.3%, comparison representation in North Watford has decreased since 2011. This is unsurprising considering the strong comparison offer at Watford Central. The majority of units are independent stores however national multiples include TK Max to the south of St Albans Road, Boots and Tesco Express. Comparison units are mainly made up of hardware, furniture, electrical and second hand stores attracting a specific market to the centre. There are just three charity shops located within the town centre.
Services	When compared to the UK average (14.5%), there is a strong representation of retail services (mainly made up of beauticians, hair dressers, dry cleaners and vehicle repair stores) which make up 18.0% of units. This compliments Watford Town Centre which has particularly low retail service representation. Although representation of leisure services (23.8%) is in line with the UK average (23.9%), they are predominantly made up of takeaway units. The lack of restaurants and other leisure services means there is limited night life in the district centre. There is a strong representation of financial and business services which, at 12.1%, is above the UK average of 10.3%. The centre's strong service representation is not surprising as North Watford's role as a district centre is to provide for a range of services and facilities to meet the day-to-day needs of their local communities. In relation to evening economy, restaurants, pubs, bars and takeaways make up 17% of the overall representation of town centre units. The majority of these are takeaway units.
Vacancies	The number of vacancies has decreased since 2011 (from 14.8% of units to 10.2% of units) which is lower than the UK average of 11.2%. The vacancies (21 in total) are spread evenly throughout the centre.

Rents	The retail rents in Watford North are much lower than Watford Town Centre ranging between £8.00 psf to £28.00 psf depending on their location along St Albans Road. **Source:** http://www.shopproperty.co.uk/shops/Watford
Pedestrian Flows	Pedestrian flows were observed to be busiest along the middle section of St Albans Road. As would be expected, reduced flows were evident on the edge of the district centre, to the north and south of St Albans Road. The length of St Albans Road along with the intersection of Balmoral Road means visitors are not inclined to walk the whole length of the centre. The busy flow of traffic also discourages pedestrians from crossing St Albans Road.
Accessibility	St Albans Road, which is the main thoroughfare through North Watford District Centre, was very busy at the time of the Nexus Site visit. North Watford has five car parks which are dispersed throughout the centre, the majority of which are short stay and charge £1.00 per hour. A number of these car parks are intended to solely serve larger retail stores, including car parks to the south of the centre, accessed off Penn Road which serve the Range, TK Max and Office Outlet. At the time of the Nexus site visits, Long Spring Car Park, to the north of the centre, was underutilised. There are two main car parks located at North Watford. Longspring Car Park offers 80 spaces (paid parking) and the Harebreaks Car Park which offers 26 spaces (paid parking). Parking is also available at the Range and TK Maxx off Penn Road. Free street parking is located along St Albans Road. The NEMS Household Survey results indicated that the majority of visitors (83.2%) are likely to travel to the centre by car (either as driver or passenger), compared to just 16.8% who walk. Both bus and cycle lanes are evident along St Albans Road. Watford North Train Station is located along Bushey Mill Lane to the east of the centre, approximately 500m from St Albans Road.
Perception of Safety	At the time of the Nexus site visits no anti-social behaviour was observed. A number of shutters were witnessed on shop fronts throughout the centre which can appear unwelcoming, particularly at night.
Environmental Quality	The centre has wide pavements on both sides of St Albans Road and plenty of street furniture in the main shopping area. The centre does however have limited seating areas, discouraging shoppers from staying in the centre for long.

	19.8% of respondents to the NEMS household survey (who visited Watford North most often) said they liked the centres 'environmental quality' the most, perhaps reflecting the vibrant atmosphere the centres niche cultural shops offer.
Customer Views and Behaviour	When respondents to the NEMS Household Survey (who identified that they visit North Watford the most) were asked what would encourage them to visit the centre more often, 18.5% said more family friendly attractions. This perhaps reflects the lack of family friendly leisure facilities and less on street draws when compared to Watford Town Centre. When asked what they like most about the centre, 19.3% of respondents said it is close to home.
Stakeholder Feedback	Stakeholder feedback was received from the Watford BID, the Watford and West Herts Chamber of Commerce and the Federation for Small Businesses. The majority of Stakeholders considered that North Watford is a healthy centre that compliments Watford Central's retail offer. There is a niche draw from the numerus second hand and cultural food shops. The centre usually experiences high footfall throughout the day. However, the busy traffic on St Albans Road can appear daunting to pedestrians.