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Three Rivers District Council

Retail and Leisure Study

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The Commission

- 1 Lambert Smith Hampton has been appointed by Three Rivers District Council (TRDC) to provide a comprehensive shopping and leisure study. This will have the following functions :
 - i) provide evidence to guide and support retail policy;
 - ii) provide an assessment of the health, vitality and viability of the districts shopping centres;
 - iii) respond to the National Planning Policy Framework (NPPF);
 - iv) to identify key outlets, features and facilities that underpin the health of town, district and local centres;
 - v) to guide the strategies for sustaining and enhancing the health of designated centres
 - vi) to advise on the quantitative and qualitative need for new retail development across the district
 - vii) to review and identify sequential opportunities to satisfy the need for additional retail development

- 2 The methodology for the study is based upon the appropriate guidance from the NPPF and the good practice guide “Planning for Town Centres” from December 2009. The following data sources have been used to complete this review.
 - i) The study uses up to date surveys of every centre and shopping parade in the district from March 2012
 - ii) an up to date telephone shopping survey of 1000 residents of the local area has been undertaken by RMG Clarity, an independent market research company
 - iii) population data has been sourced from Experian based on defined post-code sectors reflecting the household telephone survey area
 - iv) Expenditure data for three main character areas (Rural North, Semi-urban Central and Urban East) has been used to identify comparison and convenience expenditure data
 - v) Expenditure and population have been projected forwards using the latest Experian advice note to 2012, 2016, 2021 and 2026 to tie in and be comparable with the 2007 study.

- 3 The Council specifically requested that close attention be paid to the health, role and function of the South Oxhey centre in order to develop and support a strategy for its enhancement.

Executive Summary

This study has looked in detail at retail provision and shopping patterns across Three Rives District. The study considers the health of the districts defined shopping centres, their place in the retail hierarchy and the quantitative and qualitative need for new convenience and comparison floor space throughout the area. Whilst adopting a different approach and up-dated sources of data, the results of this study correspond broadly with the 2007 study in relation to quantitative requirements.

In respect of comparison goods the study concludes that there is no need to plan for significant additional provision within the district over the plan period. For convenience goods the study identifies a need for only modest increases in provision across the board.

Convenience goods are defined as food, alcoholic drinks, tobacco products, newspapers and periodicals and non-durable household goods.

Comparison goods are defined as clothing and footwear, household textiles and soft furnishings, furniture and floor-coverings, household appliances, audio visual equipment, hardware, DIY goods, decorating supplies, tools and garden products, chemist and medical goods, cosmetics and beauty products, books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods.

Where convenience need is identified, it should address local day to day needs and be so located as to reduce the need to travel for local residents.

With respect to qualitative need, there is scope to make additional convenience provision in Abbots Langley and at Maple Cross and to re-balance provision in South Oxhey to assist in regeneration and to recapture trade currently leaking from the area.

With regard to convenience shopping the study concludes that there is only limited capacity for additional convenience floor space to serve the **Rickmansworth** area (974 sq m to 2026) and that no sites need be allocated.

It considers that for **South Oxhey** there is a need and an opportunity to provide a new food-superstore of up to 2500 sq m net to anchor the retail centre. This will enable the area to retain more of its retail expenditure in a sustainable manner and to significantly enhance the vitality and viability of South Oxhey shopping centre enabling the centre to better serve its customer base. The additional footfall attracted to the centre will underpin a renaissance in the health of the centre and stimulate growth in other retail and service outlets.

In **Abbots Langley** the study concludes that there is a limited need for additional convenience shopping provision (1715 sq m by 2026) which should be met within the centre to sustain its health and viability. This town centre is recognised as vulnerable to impact from convenience development outside the centre.

Chorleywood is identified as a healthy district centre meeting the day to day and weekly shopping and service needs of its local population. There is limited scope for additional growth in convenience retail provision (83 sq m by 2026). Chorleywood has a strong independent retail sector that may be vulnerable to impact from convenience shopping developments elsewhere.

Croxley Green is recognised as having a significant convenience retail function but the dispersed nature of provision and absence of retail banking services mean the centres do not meet the day to day and weekly needs of the resident community. Notwithstanding the significant outflow of expenditure from this area to large food stores in Rickmansworth and Watford there is insufficient capacity to support a new store here.

Maple Cross is a settlement without appropriate convenience shopping provision or local services and the Council may want to consider allowing proposals for small-scale local convenience provision to serve this settlement.

In considering comparison shopping needs it is apparent that the vast majority of comparison shopping expenditure that arises in the study area is destined for Watford, a designated regional shopping centre with a full range of town centre and retail park shopping provision. Only a very limited amount of comparison shopping is carried out in this district's centres. In Rickmansworth there is some level of retention and there is scope

for modest comparison retail development to augment provision in the centre. This should be limited however, as the centre cannot compete with larger neighbours and no change in the hierarchy or structure and function of the centre should be sought.

None of the other centres in the district show any significant level of comparison shopping trade retention. What shopping provision is available should be maintained and protected. Capacity across all of the centres is elastic and small scale gains in all centres would be acceptable to reduce expenditure outflow and meet retail needs more sustainably. No significant comparison shopping should be permitted in out of centre locations as the limited provision in centres will be susceptible to impact, even at low levels.

Key retailers such as Sheffield's in Abbots Langley, The Block in Rickmansworth or the book-shop in Chorleywood all perform an important role in the attractiveness of those centres yet none of these stores will be trading so well as to be able to withstand an impact in their particular specialism or from alternative provision that draws trade and footfall away from those centres. The Council must be vigilant in protecting independent traders from impacts which reduce footfall in the centres through the identification and protection of key retailers and uses.

The study concurs with the retail hierarchy included within the Core Strategy and Site Allocations DPD and having reviewed Croxley Green no change in the status of the centre(s) is suggested.

Given the distribution of centres across the district there can be no justification for out of centre development except that required to meet day to day needs in Maple Cross or perhaps in the villages but this needs to be of an appropriate scale to operate as a local village shop.

Many of the centres studied in this analysis are or would be susceptible to impact from out of centre development, even on a modest scale. The Council's threshold for impact analysis set at 1000 sq m should be sustained but in terms of smaller developments, particularly in the more rural areas of the district lower thresholds may be appropriate and higher thresholds may be appropriate within larger urban centres. Each application should be assessed on its merits taking into account the characteristics of the retail uses proposed

and the vulnerability of key occupiers and uses in nearby centres. The specific needs and requirements of each centre and the aims of the National Planning Policy Framework to promote sustainable economic development and regeneration should also be taken into account in considering new retail proposals.

The study generally supports the Council's retail planning policy as set out in the Core Strategy and emerging Site Allocations documents and no fundamental change is considered necessary in terms of the retail hierarchy and capacity. However, the study does provide an up to date and specific context for assessing new applications for retail development in each of the identified centres.

1.0 Introduction

1.1 Three Rivers District is an area of South-West Herts close to Greater London and straddling the M25. The nearest large town is Watford to the east whilst suburbs of Greater London border the district to the south including Harrow and Hillingdon boroughs. The district combines both urban and rural areas and has a mix of settlements ranging from small villages and hamlets to the largest town, Rickmansworth, which is the administrative and cultural centre of the district.

1.2 The district is well connected to London and many residents from the area commute to work in the capital using the Metropolitan Line (underground) into Baker Street and the City, the Chiltern Line into Marylebone and overland London Midland and Southern Rail lines into London Euston and Kings Cross.

1.3 The main road links include the M25 (junctions 17 to 20) and good connections to the M1, M40 and A41. Heathrow and Luton airports are both within easy reach.

1.4 Notwithstanding the large commuter population, centres of employment within the district include office and business premises in central Rickmansworth, office and commercial space in Maple Cross, significant industrial and employment space at Tolpits Lane between Rickmansworth and Watford and on the Croxley Business Park. There is significant employment in the corridor along the Grand Union Canal heading northwards from Watford into Kings Langley and at the former Leavesden Aerodrome, now the UK home of Warner Brothers and a site for significant employment development.

1.5 Three Rivers incorporates great diversity in terms of the environment, population, wealth and opportunity. The west and north of the district encompasses the attractive settlements of Chorleywood, Abbots Langley and Sarratt which manage to retain a rural or semi-rural feel and enjoy close access to the countryside including the Chilterns Area of Outstanding Natural Beauty.

1.6 The central area of the district includes Rickmansworth and Croxley Green, the main areas of population for the district with attractive interwar housing, good access to the

countryside, dedicated underground stations and a pleasant suburban environment and feel.

1.7 To the north-east is Leavesden and Garston, effectively functioning suburbs of Watford again with good access to Countryside but with a closer relationship with Watford than with Rickmansworth.

1.8 To the south west is Maple Cross running into Harefield and Denham. This is an area of good environmental quality but tends to be less economically successful and includes significant tracts of social housing.

1.9 Centrally to the south is Moor Park, a private and gated estate dating from the interwar period. Houses here are expensive and the private nature of the estate makes it a desirable residential enclave. It is served by its own station on the Metropolitan Line and feeds commuters into London.

1.10 To the south-east the district skirts Watford and includes Oxhey and South Oxhey/Carpenders Park. This is an area of post-war housing built as an expansion of Watford and to accommodate population growth from the capital. Most of the houses here were originally in Council ownership although many have subsequently been sold under right to buy. In general terms the housing is good quality and the area well maintained with significant open space and good community facilities. Unemployment and poor social indicators are at their highest in this area of the district.

1.11 Within Three Rivers there are six main retail centres set out in the hierarchy of the adopted Local Development Framework Core Strategy at figure 7 and appendix 3. Rickmansworth is defined as a town centre, South Oxhey, Abbots Langley and Chorleywood are defined as District Centres and Croxley Green and Money Hill are defined as local centres. The boundaries and designation of each centre will be assessed to reflect any changes since the last retail study (2007) and changing definitions from PPS6 to PPS4 and now the NPPF.

1.12 Each of the centres in Three Rivers is different in character, scale and function but all fulfil many of the same roles for their surrounding catchment population. Centre

definitions are drawn from the old PPS4 and applied to each centre to provide a consistent benchmark basis for their assessment.

1.13 All of the designated centres are also influenced by retail and other activity beyond the district boundaries and we will consider both current patterns of use and try to understand the likely effects of changes in the surrounding districts that will affect the role and function of Three Rivers existing centres.

2.0 National Planning Policy Context

2.1 The national policy context for planning is set by the NPPF which was published on the 27th March 2012. This replaces guidance previously in specific PPS notes. The NPPF gives advice on plan preparation, general principles for development and retail development. This is supported by the Good Practice Guide on Planning for Town Centres from December 2009.

2.2 The NPPF places special emphasis on promoting development and includes a presumption in favour of development that is sustainable. In relation to town centres chapter 2 focuses on the positive promotion of town centres and looks to Councils to prepare strategies to support their vitality and viability. Town centres are to be well defined both within a hierarchy and with identifiable boundaries. Council's are required to allocate a range of sites to meet the scale and type of retail, leisure, commercial, office, cultural, community and residential development needed in town centres. Local authorities are required to undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites.

2.3 The advice continues with a strengthening of the sequential test seeking to ensure that the first choice for new retail, office, leisure and commercial development is town centres followed by edge of centres and only where no town centre or edge of centre sites exist will out of centre sites for new development be considered.

2.4 Where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.5 Under the heading "Plan Making" Local authorities are required to have a clear understanding of business needs within their area including both the qualitative and quantitative need for retail and leisure development; the role and function of town centres, the capacity of existing town centres to accommodate new town centre development, locations of deprivation which may benefit from plan led remedial action.

3.0 Local Development Plan Policies

(i) Core Strategy

3.1 Three Rivers District Council adopted their core strategy in October 2011. This cites the 2007 Retail Capacity study as a background document and part of the evidence base for the strategy. The document identifies the retail hierarchy for the district at appendix 3. The settlement hierarchy is set out at paragraph 3.12. Rickmansworth is identified as the Principal Town with South Oxhey, Croxley Green, Abbots Langley, Chorleywood, Leavesden and Garston and Mill End as Key Centres. Kings Langley, Capenders Park, Eastbury, Oxhey Hall, Maple Cross and Moor Park are identified as Secondary Centres and Bedmond and Sarratt defined as villages. New development is directed towards the Principal Town and the Key Centres. South Oxhey is identified in the spatial strategy as the only centre identified for regeneration.

3.2 Policy PSP 1 seeks to promote Rickmansworth for additional residential, commercial and employment development and identifies the potential for a modest increase in retail development in accordance with the 2007 retail study. The policy is aimed at enhancing the vitality and viability of the town and maintaining its place in the settlement hierarchy.

3.3 Policy PSP2 promotes the key centres as locations for development. The policy seeks to ensure that the Key Centres are capable of meeting the daily shopping needs of their respective populations. The policy promotes a modest expansion of retail floorspace within the Key Centres where opportunities arise in accordance with the Retail Capacity Study.

3.4 Criterion H of policy PSP2 specifically identifies South Oxhey Centre and seeks to secure development that will help tackle deprivation in relation to improving access to education, skills training and employment and reducing crime. Criterion H and K note the "South Oxhey Initiative" which is intended to develop a master-plan for the centre to guide development designed to improve access to services and reduce deprivation in the area.

3.5 PSP3 details the policy for Secondary Centres at Kings Langley, Capenders Park, Eastbury, Maple Cross, Moor Park and Oxhey Hall. This policy seeks to maintain and

enhance the provision of local shops within these centres to meet local daily needs. PSP 4 seeks to improve the viability and accessibility of existing services and facilities including village shops.

3.6 The retail hierarchy is set out at paragraph 5.62. This reflects the settlement hierarchy in that Rickmansworth is identified as a Town Centre, South Oxhey, Abbots Langley and Chorleywood are identified as District Centres and Croxley Green and Mill End are identified as local centres. Policy CP7 states that where there is an identified need for new town centre development, town and district centres will be the focus for this development.

3.7 The policy identifies a need for 2000 sq m of comparison floorspace by 2021 with the target provision over the forthcoming five year period of 1050 sq m by 2016 and 950 between 2016 and 2021. The policy identifies that these targets will be reviewed regularly. The targets set out here represent the conclusions of the 2007 Retail Study carried out by CBRE.

3.8 For convenience shopping the policy identifies that any provision over 1000 sq m during the plan period will generally be resisted (based on the 2007 study) but that small scale provision will be considered against impact test and the need to protect local centres and local shops.

(ii) Development Management Policies DPD

3.9 The Development Management Policies DPD was published for preferred options consultation between January and March 2012. The policies therefore carry more limited weight. Policy DM12 of the draft DPD refers to Community Leisure and Cultural Facilities. This definition includes leisure facilities, pubs, local shops, post offices and medical facilities such as surgeries and dental practices. The policy seeks to prevent the loss of these facilities and encourages the provision of new or additional community facilities.

(iii) Sites and Allocations DPD

3.10 The Site Allocations DPD was published for preferred options consultation in January 2012. At chapter 6 the document identifies the retail hierarchy and references the Town Centre, District Centres, Local Centres and Local Shops covered by policies of the plan (Policy CP7). Policy SA4 of the Site Allocations DPD sets out the policy for retail allocations. The policy directs retail development to identified centres through the defined hierarchy. The policy will resist the loss of class A1 retail uses in primary frontages. Retention of retail uses will be encouraged in the secondary frontages. Identified Local Centres and Local Shops will be protected and enhanced where they are catering for local day to day needs. The retention of retail uses will be encouraged. Annex 2 of the document sets out the primary and secondary frontages of the defined centres and identifies the local parades. These will be commented upon in the individual chapters dealing with each area or centre in turn.

3.11 The retail allocations policy sets out that in all locations, proposals for new retail development, involving gains or losses in floorspace, will be considered taking into account its accessibility, its impact on existing centres and the appropriateness of the type and scale of development. New shopping facilities will be encouraged where they are supported by up to date evidence of need, where they contribute to the vitality and viability and general economic well being of the area and where they do not impact detrimentally on existing centres.

(iv) Three Rivers Retail Capacity Study 2007

3.12 This document provides the current evidence base for the Core Strategy and Development Plan policies. This report is intended to review and update this earlier document. It is worth understanding therefore the foundation of this document and to identify any variations in base data, survey area or other changes we have made that would affect comparisons from 2007 to 2012.

3.13 The 2007 study uses the standard methodology of identifying a survey area and discrete survey zones. The study calculates the population for each zone and projects those populations forward. Per capita expenditure data is sourced from Experian, and grown according to the prevailing convenience and comparison expenditure growth rates drawn

from the Experian Retail Planner series of advice notes. This gives available expenditure by zone.

3.14 The expenditure is then apportioned according to a household telephone survey of shopping habits. The 2007 CBRE study utilises a 2005 survey conducted for Watford District Council as the basis for the distribution of expenditure. For this bespoke study it was necessary to revise the zones and the post codes they include to better reflect the patterns of shopping in the district.

Study Area

3.15 The following table identifies the original zones and post code sectors and the new zones used for this update. A map is included at appendix 1.

Fig 1. Zones and Postcode sectors 2007/2012

Original Study		New Study			
Zone	Post Codes	Zone	Zone	Post Code	
Zone 1	WD4 8	9			
	WD4 9	9	Zone 1	WD3 6	
	WD3 6	1		WD3 4	
	WD3 3	4		WD3 5	
	WD3 4	1	Zone 2	WD3 7	
WD18 8	4	WD3 1			
WD18 9	4	WD3 8			
Zone 2	WD3 1	2	Zone 3	UB9 6	
	WD3 5	1		WD3 9	
	WD3 7	2	Zone 4	WD 3 3	
	WD3 8	2		WD 18 9	
	WD3 9	3		WD18 8	
	Zone 3	UB9 6		3	Zone 5
	Zone 4	HA6 1	-	HA6 3	
HA6 2		5	Zone 6	WD19 6	
HA6 3		5		WD19 7	
Zone 5	WD18 0	7		WD19 5	

	WD18 6	7	Zone 7	WD18 0
	WD18 7	7		WD18 6
	WD19 4	7		WD18 7
Zone 6	WD19 6	6	Zone 8	WD19 4
	WD19 7	6		WD17 3
	WD19 5	6		WD17 4
	HA5 4	-		WD17 2
Zone 7	HP3 8	9	Zone 9	WD17 1
	HP3 9	-		WD4 8
	HP2 4	-		WD4 9
Zone 8	AL2 2	10	Zone 10	HP3 8
	AL2 3	10		WD5 0
	WD5 0	10		WD25 7
Zone 9	WD17 1	8		AL23
	WD17 2	8		
	WD17 3	8		
	WD17 4	8		
	WD23 2	-		

3.16 The changes made reflect a tightening of focus on particular areas and a reorganisation of zones into more homogenous areas. Zone 1 has been reduced with the northern and more rural areas being hived off into Zone 9. Zone 1 now reflects the more affluent area around Chorleywood to the north of Rickmansworth. Zone 2 has been refocused on Rickmansworth itself and Zone 3 the area to the south of Rickmansworth bordering Hillingdon and Northwood.

3.17 Zone 4 is dominated by Croxley Green sitting between Watford and Rickmansworth and Zone 5 encompasses the fringes of Three Rivers taking in parts of Moor Park, Eastbury, Batchworth, Harefield and Northwood.

3.18 Zone 6 covers South Oxhey and Carpenders Park. Areas of Hatch End and Harrow Weald outside the district have been removed (HA5 4) as their impact and the inflow of expenditure from here to Oxhey would be minimal and the expenditure per capita would distort the remainder of Zone 6 being higher value and more affluent than the Oxhey area.

Zones 7 and 8 reflect central Watford and have been divided only because their populations would distort in scale the overall area in respect of size. Zone 9 as noted earlier is the more rural area to the north of the district taking in Chipperfield, Kings Langley and Apsley, including some areas beyond Three Rivers but which attract shoppers from the northern parts of the district. Zone 10 represents areas north of Watford taking in parts of Three Rivers around Leavesden and Garston and including Abbots Langley and Bedmond.

Expenditure

3.19 The 2007 study area is classed as a single zone for the purposes of calculating expenditure per capita. This may produce distortions in store or zone turnovers reflecting higher expenditure per capita areas in Zones 1, 9 and 10, medium bands in Zones 2,3 4 and 5 and lower per capita expenditure in the Watford and Oxhey areas (See appendix 1). To get a more accurate picture across the area we divided the zones into three broad bands reflecting their character, North, South and East. Figure 2 below shows the variation in expenditure per capita across these bands and compared to the national average for both convenience and comparison shopping (2010).

Fig 2. Expenditure Per Capita- Variations by zone 2012.

Area	Convenience	% Nat. Average	Comparison	% Nat Average
North 1,9,10	£2108	+7.9%	£3575	+22.1%
South 2,3,4,5	£2070	+5.9%	£3505	+19.7%
East 6,7,8	£1825	-6.6%	£2919	-0.28%
National Average	£1953		£2927	

3.20 This table illustrates the spread across the district between the poorer east and south and the richer more rural north and west. The spread is up to 22.3% in comparison expenditure and 14.6% in convenience expenditure and illustrates why it was necessary to shuffle some of the zones and band the expenditure data.

3.21 Expenditure for the 2007 study is drawn from Experian (Formerly “Map Info”) and is based in 2003 prices. Special forms of trading (SFT) are deducted (non-shop expenditure from mail order/internet shopping) and then growth is applied using conventional rates from the time. Projecting the 2003 rates forward for the whole study area using the RPI produces a 2010 figure of £2151 per capita for convenience expenditure or £3868 per capita for comparison expenditure. In terms of convenience this is slightly ahead of the

highest current figure of £2108 and for comparison this is significantly ahead of the highest figure. This highlights the need to revise and update the study as the projections used in the 2007 study now underestimate 2011 convenience expenditure levels reflecting the application of conservative growth rates whilst comparison rates are over-inflated. The study predicts 2011 convenience expenditure per capita at £1728 which compares with the lowest band of £1825, and comparison expenditure projected to £4459 comparing with £2919 - £3575 across the bands. Much of the difference in comparison shopping can be put down to greater than expected (in 2007) growth in internet shopping (SFT).

3.22 Using this base data and population and expenditure projections the 2007 study identifies the growth in convenience and comparison expenditure across the study area. This is the first step in calculating capacity. Figure 4 below identifies the growth in available expenditure in the study area in the 2007 study.

Fig.3

Expenditure Growth 2007 Study (£ m)

	2006	2008	2011	2016	2021
Convenience Spend	£369.02	£374.8	£384	£395.07	£407.6
Convenience Growth (£m)	0	£5.78	£14.98	£26.04	£37.82
Comparison Spend	£794	£867.16	£990.64	£1222	£1511.67
Comparison Growth	0	£73.16	£196.64	£428	£717.67

3.23 These levels of growth reflect the cautious convenience per capita figures and growth and the ambitious growth in comparison expenditure which sees comparison expenditure which almost doubles (+90%) between 2006 and 2021. Because of changes to the study area, the population for the 2012 study is some 300,000 people lower than that covered by the 2005 survey following exclusions to post codes in eastern Watford, Northwood and Hatch End. Nevertheless the levels of growth identified in the 2007 study are significantly ahead of those calculated now and the capacity for growth identified now will be more limited.

Distribution

3.24 The next stage in the 2007 study was to use the results from the household survey to identify market share and consequently how much of the total available growth identified above should be planned for within Three Rivers.

3.25 The study uses the standard method of apportioning expenditure according to the results of a household survey. The expenditure is divided into convenience shopping and five comparison shopping categories. For both convenience and comparison shopping the turnover for respective centres can be calculated and this is used to determine the market share of each centre in terms of the proportion of expenditure drawn to each centre from the study area. This market share can then also be applied to the growth in comparison and convenience expenditure to identify how much of the identified growth would be available to support new development in any centre assuming no change in shopping patterns. CBRE used this approach but on an aggregated basis rather than centre by centre or zone by zone.

3.26 The final element in a capacity study is to assess the expenditure for both convenience and comparison shopping available to a centre based upon the amount of existing retail floor-space. Assumptions are made about turnover levels to determine whether existing floor-space is over or under trading and whether there is sufficient additional expenditure to support new floor-space.

Capacity

3.27 The 2007 study produces forecasts for 2011, 2016 and 2021. The study identifies at paragraph 3.15 that it is important to remember that the further advanced the forecasting date, the less certain the forecast. On this basis CBRE recognise that it is important for studies to be regularly updated. Given the change in economic fortunes since 2007 this is prescient advice.

3.28 CBRE in considering the distribution of the expenditure from the household survey in 2005 have combined the market shares for convenience goods expenditure attracted to each zone and determined that this is the market share for the district. This gives the district a market share of 13.34% of available convenience expenditure in the study area or a total expenditure of £49.25m. This is compared to a benchmark turnover of convenience

floor-space in the district of £39.04m. The study however underestimates the turnover of smaller convenience stores in the district which we would assume comprises the £10m disparity between benchmark turnovers and identified spending.

3.29 The 2007 study considers all of the convenience floor-space in the district as a single entity and combines the centres of Oxhey, Rickmansworth, Croxley Green and Abbots Langley assessing need across all of these centres together and not allowing for local differences or local apportionment of trade to stores. The 2012 study will look at centres and zones individually.

3.30 For comparison shopping, the household survey identified very low levels of trade in the district's defined centres. This reflects the low level of provision in those centres and the nature of household surveys that will emphasise the principal shopping destination ahead of smaller centres. The CBRE solution to this was to increase the proportionate distribution of comparison expenditure in these centres by 170% . The reason for the quantum is not clear.

3.31 The 2007 study presents five scenarios for growth in expenditure. A baseline (Scenario 1) which assumes market shares remain as existing with growth in retail productivity of 0.5% for convenience and 2.5% for comparison. Scenario 2 increases convenience goods market share to account for the Waitrose in Rickmansworth which had not been built at the time of the original household survey and reduces comparison market share to accommodate improvements in comparison shopping beyond the district. This uses the same growth rates as scenario 1. Scenario 3 retains existing market share and reduces growth rates to 0 for convenience and 1.5% for comparison goods. Scenario 4 reduces growth but allows for Waitrose to increase market share and scenario 5 allows for Waitrose and the projected growth from scenario 1 but also allows for significant growth in internet shopping and special forms of trading.

3.32 In our view Scenario 5 from the 2007 study should present the most appropriate outcomes reflecting what has happened across the economy and the establishment of Waitrose as a successful trading destination in Rickmansworth.

3.33 In none of the five scenarios does the calculation produce any significant surplus expenditure to support new convenience floor-space in the district. Whilst this study assumes that the surplus of £10m above benchmark turnover identified in the base-line comparison between district market share and floor-space potential is all available to support new floor-space our own assessment would largely apportion this to the previously unidentified convenience floor-space in the 2012 capacity exercise. This would lead to a greater deficit (or reduced convenience shopping need) in every scenario.

3.34 The study from 2007 uses an average sales density for convenience stores of £11,642 per square metre. Using today's sales densities for the main food store operators, this figure is high.

3.35 Scenario 5 for the study in 2007, which we regard as the most appropriate, identifies the rapid growth in internet shopping, shows a convenience floor-space negative (or oversupply) in 2011 of 650 sq m (equivalent to £15.6m). On this basis the Council's Core Strategy policy for retailing identifies no additional need for convenience shopping in the district and indicates that applications for any new convenience floor-space over 1000 sq m will generally be refused. This deficit is retained for the whole study period (with assumptions about rapid growth in internet shopping continuing to 2021). Our own analysis on this point and those shared by Experian, are that internet shopping grows rapidly between 2006 and 2014 and then levels off into an established pattern. This will be explained and reflected in Chapter 4.

3.36 For Comparison shopping the 2007 study is based upon the assumption that the household survey results need to be significantly adjusted. Given the nature of the sums involved and the proportionate allowances made little weight can be attached to the longer term projections or outcomes. Household surveys are fairly blunt instruments in respect of comparison shopping and a better approach would be to cross reference the household survey with realistic sales densities based on observations of how each centre trades so using the household survey as a method for checking and testing assumptions.

3.37 An example from the 2012 household survey identifies that the bookshop in Chorleywood is turning over around £2.6m. Clearly this outcome must be wrong and the reality is that, whilst the bookshop is an important part of Chorleywood's offer, its turnover

is not so great. In answering the question on where people buy most of their books, CD's toys, etc they have focused on the first category leading to a disproportionate turnover for the shop and so Chorleywood centre. Our own assessment adjusts expenditure to reflect existing floor-space and an estimate of how well it trades borne of observation and local knowledge of the trading performance of the various centres. This will lead to more accurate identification of existing levels of trade.

4.0 2012 Retail Capacity Study – Methodology

4.1 As noted above the methodology applied to this retail study is similar in many respects to that used in 2007. In overall terms the differences relate more to local knowledge and applying the approach in greater detail and looking at centres individually rather than the district as a whole. This will give us both a better idea of retail capacity and a better basis for formulating a strategy for each centre.

Base Data

4.2 As noted above we have secured retail expenditure and population data for a comprehensive study area, based exclusively on and commissioned bespoke for the district (Map 1). The ten survey zones have been determined using post code sectors and include every household in the district plus those areas beyond Three Rivers that we believe interact with and impact upon the district. This is a more limited study area than that used in 2007 but is better reflective of the district.

4.3 Population data for the study area is drawn from the Experian model which allows for local population growth estimates taking account of housing allocations and development projections. Population by zone is shown in table 1.

4.4 The study area represents a number of diverse locations and we have sought to reflect this by taking expenditure per capita figures for three broad areas representing the more rural and affluent north (zones 1,9 and 10), the suburban south (zones 2,3,4 and 5) and the urban areas of Watford, Oxhey and Carpenders park to the east Zones 6,7 and 8). Figure 2 above shows the differences across the district and study area and compares expenditure to the national average. The range, particularly for comparison shopping clearly vindicates this approach. Appendix 2 table 2 shows convenience expenditure per capita by zone.

Convenience Expenditure

4.5 For our base study we have followed the guidance reproduced in the Retail Planner guidance notes produced by Experian to support their convenience expenditure data (Table 2). This takes account of actual changes in expenditure between 2010, 2011 (-0.3%) and 2012 (-0.4%) and then projects forward on conservative assumptions from 2013 to

2018(+0.5%) and 2018 to 2028 (+0.6%). Similarly special forms of trading have been applied as recommended by the guidance note and reflects both the position at 2010 (7.4%) actual growth to 2012 (9.3%) and then assumed growth to 2026 on a year by year basis with growth slowing from 2014 onwards. The total convenience expenditure available in the study area is shown at table 3. The changes in available expenditure for convenience goods in the study area from 2010 are shown below (see also App 2 Table 4).

Fig 4. Convenience Expenditure Growth 2012-2026.

Convenience Goods Expenditure	2010	2012	2016	2021	2026
Total	£314.35m	£310.46m	£318.63m	£336.63m	£355.48m
Growth	0	-£3.89m	+£8.17m	+£18m	+£18.85
Cumulative Growth		0	+£8.17m	+£26.17m	+£45.02m

4.6 This is the growth available to support the whole study area. Clearly that available for Three Rivers will be more limited and indeed that available for individual centres will be reduced still further. The centre chapters will identify the available growth for each centre going forward based on existing market share and any adjustments likely as a result of opportunities for development or change. The table shows the reduction in expenditure between 2010 and 2012 and a return to modest growth thereafter. The growth is always limited, in the early years particularly, by the continued growth in internet shopping. So whilst the total of per capita convenience expenditure rises and population grows, internet shopping takes an increasing share of the total and limits the capacity for growth in bricks and mortar.

Floor-space Efficiency

4.7 The growth in internet shopping also affects retailing efficiency. The DCLG practice guide advises that increasing retail efficiency should increase sales densities in shops even with no change in expenditure or population and that retail studies should take this into account. This trend however has gone into reverse in recent years and for most convenience retailers efficiencies have reduced and sales per sq ft have declined. The guidance from Experian (table 4a of the Retail Planner note) indicates that average sales densities from 2010 have declined to 2012 and will continue to decline to 2013. Indeed the

modest growth predicted from 2013 will bring sales densities back to the 2010 level until 2018. This trend is less evident in comparison sales but multi modal sales across internet, catalogue and other forms of direct sales have eaten into sales densities on the shop floor. For these reasons the inclusion of floor-space efficiencies in this study would generally indicate a reduction in sales density. To maintain a robust approach we have not included floor-space efficiency in our capacity calculations.

Comparison Expenditure

4.8 For comparison expenditure the pattern of growth is more straightforward (Tables 5 and 6). There is limited growth between 2010 and 2012, again restricted by rapid growth in internet sales. From 2013 the comparison expenditure growth increases to a sustainable 3% p.a. through to the end of the study projection period. The table below shows the available increase in expenditure in the study area from the growth in per capita expenditure and population.

Fig 5 Comparison Goods Expenditure Growth 2012-2026

Comparison Goods Expenditure	2010	2012	2016	2021	2026
Total	£497.74	£499.07	£559.13	£678.51	£830.02
Growth		£1.33	£60.06	£119.38	£151.51
Cumulative Growth			£60.06	£179.44	£330.95

4.9 Again it should be noted that this is the growth in available expenditure for the whole study area and this will not necessarily be available to support floor-space in Three Rivers District (Table7).

Distribution of Expenditure

4.10 Having established the amount of expenditure available in the study area for both convenience and comparison goods we then distribute the expenditure by survey zone to the identified shops or centres using the results of a household survey.

4.11 The Household survey was carried out for Three Rivers District Council by independent research company RMG: Clarity in March 2012. The survey asked detailed

questions about household shopping patterns of over 1000 people across the 10 identified survey zones.

4.12 The apportionment of expenditure by zone shows us how each store or centre is trading and where the flows of expenditure from each zone are going. This identifies outflow from zones or the study area as a whole but does not identify any inflow from beyond the study area. Each centre is considered in detail within the individual centres analysis but the global picture is described below.

Convenience Expenditure Distribution 2012 Household Survey

4.13 The overall pattern of convenience expenditure distribution is determined in accordance with questions 1 and 4 of the household shopping survey. Question one deals with main food shopping and question four with top up convenience shopping. Surveys and historic research has shown that main food shopping accounts for between 70-80% of overall convenience shopping and day to day top up shopping the remainder. In most circumstances they are done at different stores, in different centres and at different times.

4.14 For the purposes of this study we have taken main food shopping to represent 75% of available convenience shopping and top up shopping 25%. The turnover afforded to stores is shown in table 16 of the economic study. The 75% of main food expenditure is apportioned to the identified shops and centres on a zone by zone basis. Similarly the 25% of expenditure on top up shopping is also distributed by store or centre.

4.15 As an example the first data set of table 16 shows that £2.82m of convenience expenditure is spent by the residents of Zone 1 in Rickmansworth town centre. This is a combination of both top up and main food expenditure. At the end of this first row we can see that a total of £15.18m is spent within Rickmansworth town centre on convenience goods by residents of the shopping study area. Using the same approach we can also see that £15.84m is spent in Waitrose in Rickmansworth. Similarly we can see that £5.62m is spent in stores in Chorleywood and £7.96m is spent in convenience stores in South Oxhey centre. We can also see that for South Oxhey (Zone 6) £7.4m is spent at the Tesco in Watford, beyond the study zone boundary indicating an outflow of expenditure from Zone 6. Drawing conclusions in this way, centre by centre and zone by zone, we can build a picture of key shops and attractions and can identify areas of quantitative and qualitative

need for convenience shopping. This approach varies from the broad brush market share approach used in the earlier CBRE study and deals with convenience need at a more localised level.

Leakage and Outflow

4.16 The retail system studied overall shows good retention of expenditure in some zones (1 and 2) and significant outflows in others (4, 6 and 9). In many cases the outflow would be as anticipated with large superstores in Watford, Hatch End, Hemel Hempstead Uxbridge and the Sainsbury at Apsley all attracting significant amounts of trade from centres across the area. Whilst trade going from Zone 6 to Watford or Hatch End should be seen as leakage when Zone 6 has an important centre at its heart, leakage from say Zone 3 to Uxbridge or Zone 9 to Apsley or Hemel Hempstead is easier to understand as these Zones contain no town or district centres. The role of centres within zones is important in defining outflow and whether such a trend needs to be addressed or whether the shopping needs of residents of those zones are sufficiently well catered for.

4.17 The presence of small convenience stores in areas without a large centre or big store can ameliorate qualitative short-falls but where a zone contains a centre that is designed to serve the main food shopping function (town and district centres) then significant outflow from that zone should give rise to concern and steps can be taken to address the outflow if necessary.

COMPARISON SHOPPING

4.18 For comparison shopping a similar approach to convenience is taken. The total available comparison shopping has been distributed according to question 5 of the household survey which identifies the main comparison shopping destination. This should only be used as a rough guide as people tend to shop in a variety of different places to meet different comparison shopping needs.

4.19 Table 17 shows the main distribution across the study area and as can be seen the answers are fairly tightly polarised into a limited number of higher order centres with Watford dominating and more distant locations taking a considerable proportion including London, Hemel Hempstead, St Albans, Uxbridge and others. Also figuring in this list of

following figure (7) identifies the main centres and percentage trade draw to each from tables 17 and table 24. The aggregate of responses to questions 8a-f should present a better spread.

Fig 7.

	Expenditure and % from general question Table 5		Expenditure and percentage from aggregate Table 12		Difference	
Watford	£359.15	71.96%	£324.27	64.97%	-£34.9m	-6.99%
Hemel	£40.14	8.04%	£31.77	6.37%	-£8.37m	-1.67%
Rickmansworth	£27.96	5.6%	£10.42	2.09%	-£17.54m	-3.51%
Uxbridge	£20.4	4.09%	£14.31	2.87%	-£6.1m	-1.2%
St Albans	£5.52	1.11%	£5.5	1.1%		
Harrow	£4.32	0.87%	£3.68	0.74	-£0.6m	-0.13%
Brent Cross	£4.47	0.9%	£3.04	0.61	-£1.43m	-0.29%
London West End	£3.26	0.65%	£5.13	1.03	+£1.87m	+0.32%
London Westfield	£0.48	0.1%	£1.08	0.22	+£0.6m	+0.12%
London Other	£0.48	0.1%	£1.1	0.2	+£0.53m	+1%
Chorleywood	£3.74	0.75%	£6.43	1.29	+£2.69m	+0.54%
Sth Oxhey	£2.79	0.56%	£3.61	0.72	+£0.82m	+0.16%
Abbots Langley	£1.65	0.33%	£4.99	1%	+£3.34m	+0.67%
Croxley Green	£0.48	0.1%	£0.82	0.16	+£0.34m	+0.06%
London Colney	£3.85	0.77%	£1.89	0.38	-£1.96m	-0.39%
Bushey Arches	£0.94	0.19%	£22.59	4.53	+£21.65m	+4.34%

4.22 Some of the differences need further explanation and analysis and these points are considered in detail in the centre chapters. They also illustrate the trouble experienced by CBRE in apportioning comparison expenditure according to the categories used in their 2005 survey and their need to adjust the survey outcomes by 170%.

4.23 The interesting feature is that the outcome for Watford Town Centre barely changed proportionately reflecting its broad range of sales across every category. Whilst less broadly based centres experienced a real and notable fall across the two questions taking in both Hemel Hempstead and Rickmansworth which have less rounded provision, in particular beyond the clothing categories in areas such as electrical goods and furniture. This is where the out of town parks attract more business and whilst they don't show up strongly in the overall pattern they are far more strongly represented in the aggregate

questions. The closer area analysis will go further into these tables and will bring out the better data sets for forecasting use. Our overall feel is for the aggregate evaluation (Table 24) although both need to be considered and conclusions drawn carefully.

Growth of Comparison Expenditure

4.24 The growth in comparison goods expenditure in the study area is shown in table 7 and fig 5 above. This growth can be apportioned according to market share as with the existing expenditure and this is done in each area chapter identifying the specific growth available to each area. This differentiates this study from the less detailed 2007 model produced by CBRE.

Leisure Provision

4.25 The household survey also sought responses on the use of leisure facilities including cinemas, restaurants, bowling, bars and nightclubs and other leisure uses. These can play an important part in underpinning the role of town centres and our economic data includes information on the leisure spend. Some of the centres in the study include a significant number of restaurants, bars, cafes and coffee shops. They also include betting shops, hairdressers, beautician and nail bars. These uses are supported by the leisure spend which plays an important part in supporting town centre vitality and viability.

4.26 Some elements of this spend can be apportioned according to the results of the household survey but in general terms our conclusions will be more generally based and will assume the use of local facilities where these are available. The total leisure spend in the area is around £3,377m. Some 6.2% of this is spent in hotels so this would, one anticipates, be spent away from the home region and given the absence of tourist destinations in the district, little of this is likely to be recouped. Much of the remainder however will be spent locally across the district and it is important that we understand where this is going. The largest element by far of leisure spend is associated with pubs, bars, restaurants, takeaways and cafe's which attract over 60% of total leisure spend, equivalent to £2,043.3m arising in this study area.

4.27 The categories of spend are set out below alongside their value in the study area.

Fig 8

Category	% of Leisure Spend (national)	Study area	Classification
Accommodation Services	6.2%	£20.94m	Hotels etc
Cultural Services	15.2%	£51.34m	Theatre, Cinema, Museum
Games of Chance	8%	£27.02m	Betting, Lottery, Casino
Hairdressing/Grooming	4.7%	£15.87m	Hairdressing, beauticians etc
Recreation/Sports	5.4%	£18.24m	Sports and leisure participation and spectator
Restaurants/Cafes etc	60.5%	£20.43m	Bars, cafe's, pubs, take-away, restaurants

4.28 Of particular relevance to this study would be the spend in restaurants and bars (table 35) and the spend on hairdressing and grooming most of which will take place in the districts centres and outlets. To a lesser extent the gaming spend will support other uses including amusement centres and betting shops found in several centres. The cultural services will support theatres, cinemas etc and the leisure spend will support gymnasia, sports clubs, football clubs, swimming pools and fitness clubs, categories less relevant to town centres and retailing. Expenditure on restaurants bars and takeaways has been apportioned according to the household survey although the results should be considered loosely there is a clear indication of where this spend is taking place and in which centres the spend makes a significant contribution.

4.29 The spend has been adjusted and assumptions made that up to 20% of this takes place in unidentified locations beyond the study area. A higher apportionment of local spend would, in our view, over-estimate the turnover of local A3/A4 and A5 outlets to a significant degree.

5.0 Focus on Centres

5.1 The following sections will focus on individual zones and centres. For each Centre there will be an assessment of its current health, role and function. This will make use of the economic data available, our local knowledge, the shop survey and household telephone survey, published sources of information and site surveys. This will identify the strengths and weaknesses of centres and enable proper planning for their future. Key uses will be identified and any potential threats to their vitality and viability. Each will include a review of the designated frontages, sequential sites and background policy position and a strategy going forward for each will be suggested.

5.2 The study will start with the main Town Centre, Rickmansworth and will go on to consider the district centres of South Oxhey, Chorleywood and Abbots Langley. The neighbourhood centres at Croxley Green, will be considered along with Zone 4. Other centres at MoneyHill/Mill End and Moor Park will also be considered but in less detail. The reports will consider the need for new retail floor space and capacity issues relating to new provision. A final summary section will consider the district as a whole and identify needs across the district drawn from the local centres analysis. This will identify shortfalls in provision and gaps in facilities and services.

6.0 Rickmansworth Town Centre and Zone 2.

6.1 Rickmansworth is the only town centre defined in the district. It is the administrative centre of Three Rivers and sits close to the main populations in Chorleywood, Rickmansworth, Maple Cross and Croxley Green. The town is served by two large supermarkets Tesco, out of centre at Harefield Road, and Waitrose, close to the town centre on Park Road. Within the town centre itself the main retail outlets are Marks and Spencer's Foodhall, a WH Smiths newsagent and booksellers, Boots the Chemist, M and Co clothes shop, Iceland grocers, Halfords Bike Shop and the main banking chains including Natwest, Barclays, Lloyds and Santander. The centre has a range of independent convenience shops including newsagents, butchers, greengrocers and bakers as well as several specialist bakers and delicatessens. Coffee chains including Cafe Nero and Costa Coffee are present and there is a thriving restaurant and bar culture including a number of independent outlets and local chains.

6.2 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.

6.3 Rickmansworth is a busy small suburban town serving in part as a dormitory for London commuters who can travel into London on the Metropolitan Line (City of London 40 mins) or the Chiltern Line (Marylebone 30 mins). Rickmansworth has a limited amount of employment provided in the main offices of Comet close to the station and a range of smaller offices dotted throughout the town centre, in particular at its eastern fringe. To the south towards Watford on Tolpits Lane and beyond the town itself is an extensive employment area including significant industrial and warehouse space, offices including those of Camelot and a range of smaller business and commercial premises. To the west beyond Money Hill/Mill End lies Maple Cross a smaller settlement that includes a range of office premises fronting the A404 and close to Junction 17 of the M25. Other centres for employment nearby include Watford, Uxbridge, Hemel Hempstead and Slough.

Retail Provision

6.4 The Table below identifies the main categories of use within the defined town centre. The function of the centre is predominantly convenience and service uses meeting

day to day and weekly shopping needs of a local population and a day time workforce from the centre itself, at Tolpits Lane, and at Maple Cross.

6.5 The comparison retail sector is fairly limited and the only comparison chains present are WH Smith, Halfords, Boots, Superdrug, Clarks and M and Co. There are a good range of charity shops in the centre but this should not be viewed as a negative for Rickmansworth. Food outlets and specialist food provision is good and there remains a strong independent food sector including a green grocer, butchers and three bakers. Hidden within the categories are 9 estate agents, 9 hair and beauty outlets, 6 charity shops and 3 card shops.

Fig 9 Rickmansworth Town Centre Uses

Category	No.	%	Floorspace Sq m net
A1 Convenience	15	12	1737
A1 Comparison	30	24	1545
A1 Other/Services	21	16.8	2460
A2 Banks/Build Soc Recruit/Estate	20	16	975
A3 Restaurants	11	8.8	1020
A4 Pubs/Bars	5	4	463
A5 Take-away	2	1.6	185
B1 Office	15	12	675
D1 Medical	2	1.6	80
Vacant	4	3.2	120
Total	125		9165

6.10 The table shows that there is a good mix of uses in the centre but that by floor space the centre is dominated by the convenience outlets (Iceland and M & S Food). The high level of service provision including all the major banks and building societies indicates the centre has a strong service role along with the presence of 9 hairdressers, three travel agents and four opticians.

6.11 Vacancies in the centre are very low. Three of the four are in the more secondary area of Church Street whilst only one rather small unit in the High Street is currently vacant. These amount to only 3.2% of total units which sits well below the current national average that falls between 12 % and 14%. In 2007 vacancies amounted to 3 units.

Notwithstanding these vacancies 14 retailers are currently seeking representation in Rickmansworth (Focus 2012). This requirement has remained constant since 2008 but has declined from a peak of 45 requirements in October 2005. The level of vacancies and this demand represents a strong indication of the health of the centre and implicit in this is potential for further development to provide modern retail units in the centre.

6.12 In addition to the shops the centre includes a range of offices and other uses in peripheral locations including a secondary school, theatre and nursery (Watersmeet), the Council offices, a small museum, fire and ambulance station, a low cost hotel and a range of smaller complementary uses.

Evening Economy

6.13 The centre is well populated with restaurants (11) whilst there are only two take away outlets. For the Rickmansworth area the main location for take-away food is at Money Hill where the uses proliferate. The town centre evening economy is more about night-time visitors who come to eat and drink. Pubs and bars include the Feathers, Pennsylvanian, Coach and Horses, Fox and Hounds and Druids all of which offer food and dining facilities as well as bar service. The household survey identifies Rickmansworth as a popular pub and restaurant destination for people across the study area and not just for the local zone. On the basis of the household survey and expenditure data some £20m is spent in Rickmansworth in pubs, restaurants and hot food take-aways. These results (according to the household survey) would include the spend at outlets beyond the town centre including Restaurants and take-away outlets at Money Hill, Tudor Parade and Church Lane and including several pubs beyond the town centre.

6.14 The range of uses tells us much about Rickmansworth. It provides a full range of retail and associated service uses to meet the day to day shopping needs of the catchment population. It serves a basic comparison shopping function and retails a range of basic and boutique clothes, household goods, gifts, jewellery and chemist's goods to satisfy day to day and weekly shopping requirements. The nature of the retail offer means it is unlikely to fulfil a single purpose comparison shopping trip and does not compete in this area with higher order centres. It has a strong evening economy based around pubs, restaurants and

bars but does not offer cultural services in terms of a full line cinema or Theatre. It has a strong convenience offer but the town centre does not cater for main food shopping.

Rental Levels

6.15 Rents in Rickmansworth are currently around £50-£60 per sq ft. This compares with Watford, the sub-regional centre where rents in the Harlequin Centre are approaching £200 per sq ft and outside this enclosed centre, rents are around £80-£90sq ft. Stepping down rents in Chorleywood are £30-£40 and rents in Mill End would be around £25-£30 sq ft. The rents reflect the demand for units and the hierarchical position of Rickmansworth by comparison with Watford and the smaller centres in the area.

Town Centre Environment

6.16 Rickmansworth has an attractive town centre with several historic buildings located along both the High Street and Church Street. The properties are generally in good condition and pavements and street furniture co-ordinated and uniform throughout. Around the library and along the Northway street trees bring in some softening to the street scene and in general terms the two/three storey domestic scale of the high street and Church Street create a pleasant commercial atmosphere.

6.17 The town is the subject of a complex one way system and traffic has access through the main shopping streets although alternative routes around the town for through traffic are encouraged and well used. Pavements on Church Street are narrow and detract from an otherwise comfortable pedestrian environment. Traffic calming in the main high street including lay-by parking and signal controls at the main junction serve to slow traffic circulation to the centres benefit. More contemporary areas of development including the Council offices, Watersmeet Theatre and the car parks and residential development that sit to the north of the high-street are appropriately scaled and designed and complement the wider environment.

6.18 The town centre is well defined and framed by the railway to the north and east where over-bridges mark the approaches to the town centre proper. To the west this is marked by the Ebury roundabout and to the south along Riverside Drive by the Batchworth roundabout. The southern backstreets of the centre are characterised by two storey terraced and semi-detached houses with some more modern flats at the periphery.

To the north and west of the High Street more modern flatted development on the Northway, Station Road and Parsonage Road have contributed to activity in the centre without harming its commercial nature. Beyond the centre to the south-west is a public park based around flooded gravel pits known as the Aquadrome which includes boating, waterskiing, fishing and an extensive Children's play area. This is adjoined by the Grand Union Canal which runs through Rickmansworth to the east.

Transportation and Car Parking

6.19 Rickmansworth is reasonably well served for car parking in the town centre including a two storey car park on the Northway. In addition there is a public car park to the west end of the town adjacent Marks and Spencers and this is supplemented by the stores own car park. Also accessed off Church Street is a further small public car park whilst the eastern part of the town has a small car park accessed off the High Street. In addition short term car parking is available in the High Street and off the Northway although this is complicated by loading bays which are seldom used correctly.

6.20 The centre has very good public transport links provided by rail on the Metropolitan and Chiltern lines from Rickmansworth Station and the bus facilities on both the High Street and Station Approach which integrate public transport with the wider town centre.

Retail Capacity

6.21 Rickmansworth town centre sits within and is the main centre within Zone 2 of the Household survey zones. Table 26 of the economic analysis sets out the existing retail floor-space for Rickmansworth and the wider Zone 2. In considering the capacity for retail development in this zone we have included both Tesco on Harefield Road and Waitrose on Park Road in the overall provision for convenience goods as they contribute to the retail need in the area. Should a site in the town centre be available for convenience development neither the Tesco nor the Waitrose would be considered as a part of the town centre turn-over. In addition provision in local parades in Church Lane and at Money Hill/Mill End is also quantified and included in the capacity analysis. It is fair to say that Rickmansworth and its residential areas are well provided with local convenience stores, particularly since the arrival of the Tesco at Tudor Parade.

6.22 Convenience retail provision within the Rickmansworth area has a benchmark turnover of £63m (2010 Prices). This is concentrated in the two out of centre food stores (Tesco and Waitrose) and in the smaller M&S and Iceland stores in Rickmansworth town centre and to a lesser extent in the smaller convenience stores and independents. The Tesco and Waitrose supermarkets make up £43.2m of this turnover potential or 68% of total provision.

6.23 The household survey analysis shows that Rickmansworth and its surrounds draw some £68.21m in convenience turnover from the study area, exceeding benchmark by around £4.8m or 7.6%. This is within margins of error for a study of this nature and suggests that stores are trading at or around expected average sales densities. Behind these figures there is some evidence to suggest that the expenditure is not so evenly distributed however as the Tesco store is shown in table 5 to be trading at £28.9m, whilst the Waitrose achieves £15.84m. This should be compared with the expected Benchmarks which have Tesco trading at £19.8m and Waitrose at £23.4m showing the Tesco as over-trading by £8.9m and the Waitrose under-trading by £7.6m.

6.24 Competition between these retailers however should not be regarded as a planning concern, particularly where both are out of centre stores. The inference however is that Waitrose could support additional expenditure whilst the Tesco is probably trading close to capacity and increases in business at Tesco would be difficult to achieve as congested in-store trading conditions would deter increasing customer numbers.

6.25 Across Zone 2 Rickmansworth and surrounds attract the majority of convenience retail business and secures 89.5% of the convenience goods spend in the Zone. This is an impressive retention rate and further inroads into the final 10% would be difficult to achieve as a basic proportion of expenditure will always be directed outside the home area.

6.26 Rickmansworth, as the only town centre in the area, also benefits from trade arising in other zones including Zone 1 (Chorleywood/Sarratt) to the north (£12.96m), Zone 3 (Harefield and Maple Cross) to the south (£9.85m) and Zone 4 (Croxley Green) to the east (£10.87). In total the zone attracts 21.97% of available convenience expenditure from the survey area. This represents its convenience market share.

Convenience Capacity

6.27 In order to understand the capacity for additional convenience floor space we can consider three issues. Current trading levels and patterns; outflow of expenditure and the growth in convenience expenditure generated by increases in per capita spend and increases in population. In relation to the first, there is a narrow surplus in local expenditure of £4.8m although were Waitrose to absorb this additional trade the store would not over-trade. In general terms the local market for convenience goods is in equilibrium. In respect of the outflow of expenditure from the local area this is extremely limited at around 10% and little could be done to address this issue, indeed given the significant inflow of expenditure from surrounding areas that outweighs the outflow by a factor of 20, this cannot be considered as contributing to a need for additional floor space to serve the area.

6.28 Through the plan period there will be convenience expenditure growth and the table below identifies the additional expenditure (cumulative) and floor space capacity. This is achieved by applying the market share for Rickmansworth to the growth available in the study area. The increase in expenditure is then translated into floor space by applying the average sales density for convenience operators and this gives us a floor-space figure in square metres.

Fig 10. Rickmansworth Convenience Expenditure Growth

Year	Total Growth £m	Market Share	Rickmansworth Area Capacity £m	Floor space Capacity m ²
2010	0	21.97%	0	
2012	0	21.97%	0	
2016	£8.17m	21.97%	£1.79m	176
2021	£26.17m	21.97%	£5.74m	565
2026	£45.02m	21.97%	£9.89m	974

6.29 The floor space capacity is based upon the average sales density of the 8 main convenience operators including Asda, Tesco, Morrison, Waitrose, Co-op, Sainsbury, Iceland (£943/sq ft or £10,150 sq m). This capacity table assumes there are no other claims on the surplus expenditure serving this area. This will be discussed in more detail in the summary analysis across all centres. As can be seen there is little need for additional floor

space until 2020. Only an additional 176 sq m could be provided to serve the Rickmansworth catchment area by 2016. By 2021 there may be a need for a new small convenience supermarket of 565 sq m. Until such time as trends in internet shopping are cemented and assumptions about continuing convenience expenditure growth can be more accurately predicted we would suggest that the 2026 figures are treated with a degree of caution.

Comparison Retailing

6.30 Comparison retailing in Rickmansworth is limited, notwithstanding the number of comparison retail units. CBRE estimated comparison floor-space to be 4370 sq m gross (drawn from GOAD reports). Our current estimate for the town centre is 1545 sq m net making an analysis of the 30 comparison retail premises identified in appendix 3. This does not include the Travis Perkins yard at the end of Church St and beyond the town centre proper, the limited comparison space at Money Hill or miscellaneous comparison shops in the Mill End/Money Hill area. It also excludes the limited floor space in Waitrose and Tesco devoted to the sale of comparison goods. The disparity between the CBRE/GOAD figures are difficult to reconcile, the gross figures used by GOAD would net out at 60% at 2622 sq m net and there has been only limited change in representation since 2006. Nevertheless we regard our current estimate as robust but would not suggest that comparison retailing in Rickmansworth has diminished by 40% since 2007.

6.31 The household survey does not identify significant comparison trade in Rickmansworth either from Zone 2 (£4.5m) or the rest of the study area (£5.92m) and the retention for Zone 2 stands at only 10.2% or a market share from the study area of 2.08%. Clearly the comparison trade in Rickmansworth is limited but it does play an important part in the make-up of the centre and contributes to its vitality and viability. The turnover of the centre, according to the household survey, at £10.42m suggests a sales density in the existing floor-space of £6744/sq m which is at a healthy level of return for a secondary centre.

6.32 The centre presents no challenge to the dominance of Watford and indeed would not, in my view, be impacted by further growth in Watford or the other centres that serve this catchment area. Key outlets in the centre are WH Smith and Thame the stationers which help to serve the office and commercial premises in the town with stationary and

office services; M and Co which provides a glimpse of high street women's wear retailing; Clarkes Shoes which appears to be something of an anachronism but nevertheless appears to trade well; Halfords/Bike Hut and the three pharmacies including Boots and Superdrug. The independents including Muse ladies wear and the Block a fashion outlet are the type of small smart independent traders that give centres an individuality and interest that contribute disproportionately to vitality and viability, not through generating footfall, but through providing the variety that customers appreciate.

6.33 The level of comparison shopping is appropriate to the role of Rickmansworth in meeting day to day and weekly shopping needs but not serving the higher order comparison shopping functions. By its very nature there is insufficient mass to allow proper comparison shopping and the retailers present are operating comfortably in an environment of limited local competition. The Council needs to be careful to resist new or expanded comparison retailing that would undermine the current operators in the town. The main threat would be the provision of additional comparison retailing and services in superstores or supermarkets close to, but not in, the town which may negate the need to visit the town as part of a weekly shopping trip. Both Tesco and Waitrose operate under restricted permissions in respect of the sale of comparison goods and this position needs to be maintained.

Comparison Capacity

6.34 In terms of the need for additional comparison floor space the potential for provision is elastic. There is some demand for additional space in modern units as demonstrated by the Focus report but this is not essential to underpin the health of the town centre. Modest and incremental increases in provision that reduced out-flow from the centre should be welcomed but the centre should not support ambitious proposals for expansion that would seek to radically alter the place of Rickmansworth in the shopping hierarchy or which would rely heavily on changing Rickmansworth's current market share. Applying the market share to the projected growth in comparison expenditure across the study area would give rise to the following growth potential:

Fig 11 Rickmansworth Comparison Expenditure Growth

Year	Growth £m	Market Share %	Available Expenditure £m	Floor-space m ² (£5000/sq m)

2010	0	2.08	0	0
2012	£1.33	2.08	£0.027m	5.5 m ²
2016	£61.39	2.08	£1.27m	255.4 m ²
2021	£180.77	2.08	£3.76m	752m ²
2026	£332.28	2.08	£6.91m	1382 m ²

6.35 The table at Fig 11 identifies the extent of additional comparison floorspace that could be accommodated in Rickmansworth as a result of growth applied to the centre's market share. To 2016 the growth is very limited and would support around 2 additional unit shops, by 2021 this would be 752 sq m again, not a significant amount of additional floorspace and no more than could be achieved by the modest expansion of existing premises in the centre. These figures do not give rise to a need for an allocation and should not drive ambitions to expand the comparison retail offer in the town by any substantive amount. Within reason comparison capacity in Rickmansworth is elastic as greater floorspace may increase market share but any provision here should be made in the centre as out of centre development may jeopardise the limited existing comparison outlets in the town and through impact here threaten its overall retail mix and reduce its attractiveness to shoppers.

Leisure Economy

6.36 Rickmansworth was amongst the strongest performers in the leisure economy attracting some 30% of trade from its home zone and some 7.6% from the wider study area with a total turnover close to £26m in its pubs, bars, restaurants and take-away outlets. There is still a strong level of outflow and this goes to a disparate range of places but much of the spend will be in higher order facilities (restaurants in London and the West End, bars and nightclubs in Watford and higher order leisure destinations). Because of the high level of outflow there is obviously further potential for this type of use in Rickmansworth but this should fit with the towns character and be reflected through Restaurant or bar provision rather than night-club and late night provision which has more of a Watford or London feel.

Key Town Centre Uses

6.37 In our review of the town centre we recognise the High Street stretching from the junction with Church Street to Marks and Spencer to be most important frontages and to include the key uses of Marks and Spencers, the banks, WH Smith, Clarkes shoes,

Superdrug, Boots and a range of independent comparison shops (Muse, Block M and Co). These uses meet the basic day to day needs of visiting members of the public and provide the variety that sets Rickmansworth apart from the smaller district centres.

Money Hill Parade and Mill End

6.38 Beyond Rickmansworth but still within Zone 2 are the Local Centre at Money Hill and the local parades in the residential area on Uxbridge Road, at Tudor Parade and at Church Lane in Rickmansworth. Moneyhill provides an extensive area of shops incorporating some 37 shop outlets arranged either side of the A404 Uxbridge Road. The centre is only 400m away from Rickmansworth town centre but has a different offer and character to the town centre. The table below identifies the range of uses present.

Fig.12 Money Hill Centre Uses

Use	Number	Proportion
A1 Convenience	2	5.4%
A1 Comparison	10	27%
A1 Service	6	16.2%
A2 Uses	1	2.7%
A3	8	21.6%
A4	0	0
A5	7	18.9%
Other	0	0
Vacant	3	8.1%

6.38 Moneyhill is the A3 centre for Rickmansworth and surrounds with a heavy concentration of restaurant and take-away uses. This is not necessarily a bad thing as it gives the centre a distinct function and provides both day time and night time activity whilst the presence of the convenience stores here and nearby at the Shell filling station (M&S outlet) ensure the local population have access to day to day shopping needs. The centre also provides a good location for secondary retailers including the furniture, decorating and electrical shops that may be marginal if forced to pay the rents prevalent in Rickmansworth town centre. Vacancies here are higher than elsewhere in the district perhaps reflecting the transitory nature and high turnover of businesses here but they still fall well below the national average.

6.39 Elsewhere in Rickmansworth parades of shops at Church Lane and Tudor Way present further opportunities for local shopping and service provision. Church Lane includes around seven outlets, two of which are convenience stores serving purely local top up shopping needs. In addition this parade includes a takeaway and a launderette. Tudor Way also serves a local area but provision there has recently been enhanced by provision of a Tesco Express supermarket of 320 sq m. This will challenge the adjacent parade which has included three convenience stores. We would expect a reshuffling of this parade as the effects of Tesco are felt but the higher footfall attracted by Tesco may secure the parade's future for other complementary uses.

7.0 South Oxhey Area Detailed Analysis for Zone 6.

7.1 In commissioning this study the Council expressed particular interest in the South Oxhey town centre. This centre is designated in the Three Rivers District Core Strategy as a District Centre.

7.2 South Oxhey is located at the centre of an extensive estate of post war social housing constructed to the south and west of Watford. The housing comprises flats, terraces and maisonettes with a predominance of terraced and semi detached houses. Almost all of this housing is two storey and is in a reasonable condition. Many of the properties have been subsequently bought under right to buy legislation and sold on. The area is of generally good character with plentiful open space, many public facilities including a swimming pool, library, churches, community halls, primary schools, a police station and other general community facilities clustered around the shopping centre.

7.3 South Oxhey is co-located with Carpenders Park, the two areas bisected by the main- line railway into London and served by Carpenders Park Station. Carpenders Park is broadly similar in character to South Oxhey barring the nature and tenure of properties where the majority in Carpenders Park are semi-detached private houses. In combination Carpenders Park and Oxhey comprise a distinct settlement with a population close to 20,000 people. At the centre of this area lies the South Oxhey District Centre. Elsewhere within the area are small local parades of shops at Hallows Crescent, Prestwick Road, Little Oxhey Lane and to the east of the station at Carpenders Park. These subsidiary centres perform a more limited retail function in comparison to the district centre.

7.4 The Council, by virtue of the history of the area as first and foremost a post- war council housing estate, have significant land holdings including the District Centre and surrounding sites. All of the social housing has been transferred to an independent RP including the flats over the shops in the centre. The peripheral shopping parades have been sold as investments.

7.5 The centre, whilst serving a basic retail function is heavily subsidised by the Council. Rents are kept low, and in some cases, extremely low to maintain occupancy and vitality but this is not a viable long-term proposition. The Council have begun the process of

reviewing the centre and planning for its future. The options going forward must make the centre a viable economic proposition. The form that the centre takes is up for discussion. The single objective is that South Oxhey continues to serve its local population as a district centre providing for day to day and weekly shopping, services, leisure and community needs.

7.6 In order to plan for its future it is important to understand the role the centre performs at present. The following detailed assessment of the centre provides a full assessment of its health and vitality and viability and can be used to understand its role and function. This in turn can be used to identify the key aspects that maintain its vitality and to identify any shortfall in provision or opportunities for better provision that may assist the centre in maintaining and strengthening its place in the retail hierarchy.

South Oxhey District Centre Health Check Assessment

Range of Uses

7.7 South Oxhey as a centre includes some 74 retail units divided into 68 outlets. The following table identifies the current uses and the number of vacant outlets.

Fig 13. South Oxhey District Centre Uses

Use Class/Sub-divisions	Number	Percent	National Chains
A1 Convenience	12	17.6%	5
A1 Comparison	19	27.9%	0
A1 Service Uses	13	19.1%	1
A2 Uses	7	10.2%	1
A3 Uses	5	7.3%	0
A4 Uses	1	1.4%	0
A5 Uses	5	7.3%	0
D1 Uses	1	1.4%	0
B1 Uses	2	2.9%	0
Vacant	3	4.4%	-
Totals	68		7

7.8 This analysis shows that the centre has a significant proportion of convenience outlets albeit that they are generally small. The convenience function includes a significant number of national chains including the Coop, Nisa (part of Asda) Tesco, and Greggs. McColls is a fascia in the Forbouys newsagents chain. There are no multiples in the

comparison shopping category and indeed comparison units are generally small scale independent outlets. Several of the larger units (Spicer's furniture, GK bathrooms and the White Goods appliance shop) are single outlet traders taking advantage of the low rents to secure extensive showroom and back-up storage space. The absence of multiples is indicative of the nature of the centre and reflects its day to day and weekly role rather than any higher order comparison retailing function.

7.9 The only remaining bank in the centre is Barclays and this reflects national trends where the high street operators have pulled out of smaller centres to focus on high foot-fall higher value centres. Other service users include the usual estate agents and financial/mortgage advisors. The centre also includes a dentist at ground floor and in smaller centres this is not unusual. There appear to be no commercial uses at first floor above the shops.

7.10 The vacancy rate is very low compared with a national average of between 12 and 14% at present. Given the tough economic circumstances prevalent at present this represents exceptional performance and we should try to understand why South Oxhey has not suffered in the current down turn. Much can be made, as mentioned above, of the Council's benevolent management and stewardship of the centre which has resulted in several units on particularly low rents and this is allowing some retailers to continue to trade from here who would otherwise struggle to pay a commercial rent.

Multiple Representation and Service Sectors

7.11 The level of multiple representation within a centre is a good indicator of its place in the retail hierarchy. The only multiples present in South Oxhey comprise the convenience stores, Barclays Bank and Ladbroke's. There are no comparison multiples and this suggests a lower order centre with a very limited comparison shopping role. The convenience and service functions of the centre are strong barring the absence of the major clearing banks and building societies and it is important that this sector is maintained. Whilst the post office covers many of the traditional services, retention of banking facilities is a key provision and it is important for the centre to retain Barclays Bank. The disappearance of the banking sector would take the status of the centre down another tier as it would no longer be able to fulfil the day to day or weekly needs of its catchment population. Residents seeking banking services would be forced out to other centres.

Centre Environment

7.12 The centre overall is in a reasonable condition. The buildings whilst not attractive or appealing in an architectural or character sense are functional and in reasonable condition. The streets are all well paved and the centre enjoys a positive sense of safety and space created by the wide and pedestrianised St Andrews Road. The centre overall is compact in an H shape with Bridlington Road and the Parade running across the respective ends of St Andrews Road. The absence of significant vacancies is a boost but the environment does suffer from the preponderance of take away units on The Parade, several of which are not open in the mornings or during the day time and present blank shuttered facades.

7.13 The centre does lack planting and green space and what is there is poorly maintained and threadbare. Railings installed for traffic management and safety detract from the environment on the Parade and on Bridlington Road. The car park beyond Bridlington Road is an important facility but, ponding in wet weather can create extensive puddles and detract from centre use. The separation of the Tesco Express at the filing station and the associated shops around the station forecourt from the rest of the centre is a detraction overall although crossing facilities are good. More could be made of opportunities around the station forecourt for planting and this area is currently neither attractive nor welcoming. The streets around the centre are fairly busy in terms of traffic although speeds on the Parade and Bridlington Road are low and the traffic environment has a safe feel.

Rental Levels

7.14 Rents in the centre are low and range between £6 and £16 per sq ft. This is the lowest of any of the centres studied in Three Rivers and represents the bottom of the retail market in this area. The cheap rents however enable a range of operators to survive that would otherwise be displaced or cease to trade. As noted above some traders have taken significant space to capitalise on the low rents and use the space for storage of stock or to hold a wider range than would otherwise be expected. Other traders (The Trophy Shop) represent a niche market that would find it difficult to secure space in a higher order location or centre. Many rents are more akin to market stalls than retail outlets. The

primary frontages for Oxhey are those fronting onto St Andrews Road in the pedestrian area, particularly towards the car park on Bridlington Road.

Transportation and Car Parking

7.15 South Oxhey centre is served by car parking both in service roads at the Parade and along Bridlington Road but also by a surface car park on Bridlington Road. The nature of visits here, the strong walk-in catchment and lower than average car ownership levels in the vicinity suggest that the centre is well provided for in car parking but our experience on visits is that parking remains in demand and there may be an existing shortfall. Public transport is provided by a number of bus services to the centre with buses stopping close to the shops on three of the centres four sides. Carpenders Park station is also located nearby although visitors to the centre are unlikely to come by train and this is more of a service for commuters and those travelling to or from work and college. Overall the provision of public transport appears reasonable and buses to Watford often carry those leaving or returning from shopping trips to the food stores and town centre.

Retail Capacity

7.16 South Oxhey centre is centrally located in Zone 6 of the household study area and comprises three post-code sectors that relate well together (WD19 5, WD19 6 and WD19 7). The area is located to the south of Watford and west of Bushey and is largely separate from the Watford conurbation. To the south lies the end of the Weald Ridge and here Three Rivers abuts the London Borough of Harrow. Again the urban areas of South Oxhey and Carpenders Park are separate from Hatch End and Harrow Weald with countryside in the intervening gap. To the west lies Northwood, an area of private estates and more affluent housing popular with commuters to central London and focussed around the Metropolitan Railway line stations at Northwood, Northwood Hills and Moor Park. Again this area is separated from South Oxhey by green wedges and woodland.

7.17 The three postcodes together comprise some 18,817 people at 2012. As is discussed above, the expenditure per capita figures for comparison retailing are some 7% below the national average whilst elsewhere in the study area figures 20% above the national average can be found. For convenience spending the area is only marginally below the national average but the areas to the west are still well ahead. For leisure spending the area hits the

national average almost exactly but again the areas to the west are substantially higher. South Oxhey represents a pocket of deprivation in an otherwise affluent area and for all social indicators it falls behind the remainder of Three Rivers District.

Convenience Retailing

7.18 For the purposes of this study in assessing market share and retail capacity we have included both the in-centre provision for South Oxhey centre and the parades at Carpenders Park, Hallowes Crescent, Little Oxhey Lane and Prestwick Road as contributing toward the provision for the area. The existing convenience floor space in the centre and surrounds is detailed at table 28 of the economic analysis and this shows that within the centre itself there is convenience floorspace with a turnover potential of £8.05m. In addition the surrounding parades contribute a further £2.26m of potential convenience turnover giving a total for Zone 6 of over £10.3m. The majority of this floor space can be classed as small convenience stores and supermarkets. There are no superstores and no stores that would be aimed at the main food / bulk food shopping market. The largest stores are the Co-op in South Oxhey with a net sales area of 280 sq m closely followed by the Co-op at Carpenders Park (240 sq m net) the Tesco Express (260 sq m net) and the Nisa store (180 sq m net). In convenience shopping terms these are considered to be “basket” shops rather than “trolley” shops.

7.19 The results of the household survey bear this out. Only 13.5 % of shoppers in Zone 6 identified stores in Zone 6 as the location where they carried out their main food shopping. This indicates a massive outflow from the Zone of 86.5% or £22.19m of convenience food expenditure. Conversely with respect to top up shopping 72.6% of shoppers from Zone 6 remained in the area to carry out their top up shopping. The main destinations for outflow are large convenience stores in Hatch End (Morrisons £3.08m), Tesco, Watford (£7.4m) and Sainsbury at Watford town centre (£1.78m). These outflows are unsurprising as Oxhey does not have this level or tier of main food provision.

7.20 The shopping patterns currently reflect the store provision in that Oxhey is under-represented in main food shopping provision and over-represented in top up shopping provision.

7.21 The level of outflow from Oxhey, which as described above is a discrete settlement in its own right, represents the first element of retail need. The centre has no main food provision and yet as a locale generates sufficient main food and convenience expenditure to support a superstore (more than 2500 sq m). The residents of Oxhey at present have to travel either into Watford or Hatch End to access this level of convenience provision which is neither sustainable nor convenient for the local population.

7.22 In addition to the large outflow, the Oxhey area will experience some limited growth in convenience expenditure during the plan period. South Oxhey has a market share of only 3.5% of the available convenience expenditure in the study area and this will generate the following convenience growth or capacity.

Fig.14 South Oxhey Convenience Expenditure Capacity

Year	Total Growth £m	Market Share	Oxhey Area Capacity £m	Floorspace Capacity m ²
2010	0	3.5%	0	
2012	0	3.5%	0	
2016	£8.17m	3.5%	£0.28m	28.2 m ²
2021	£26.17m	3.5%	£0.91m	90.2 m ²
2026	£45.02m	3.5%	£1.57m	155 m ²

7.23 This study has previously reviewed the market share of Rickmansworth which managed to retain 89% of the trade arising in Zone 2, mainly due to the presence of Tesco and Waitrose stores within the zone which generate a study area market share of over 21%. It should be an objective for Oxhey to retain a significant element of the convenience market share generated from Zone 6 .

7.24 In order to achieve this, the centre would require a main food outlet to provide the level and range of goods to meet consumer demand. Clearly food stores come in a variety of formats and sizes, the Tesco in Watford comprises over 120,000 sq ft of sales of which 40-45% is in convenience goods. The Morrisons at Hatch end is smaller but still has a net sales area of around 60,000 sq ft and includes some non food ranges. At the other end of the scale the Tesco in Rickmansworth which functions as a main food shopping destination, has a sales area of 24000 sq ft of which some 20,000sq ft is given over to convenience goods. This store has a turnover of some £28m against a benchmark turnover of £19.9m.

£9.7m of this turnover is derived from Zone 2. This could serve as a template for the type of store that could be supported by the expenditure of South Oxhey.

7.25 As noted above, currently some £22m of expenditure leaks from Zone 6 to surrounding large food stores. Whilst a new store in Oxhey could not be expected to attract all of this trade, there is potential for significant retention were a new store to be provided. The size of store needs to be sufficient to attract back the leaking trade but should not be of such a scale as to draw all of the convenience trade away from other centres and need not compete in terms of scale with either Watford or Hatch End stores. The danger is that a new store would harm the existing smaller traders in Oxhey and surrounding areas and a balance needs to be struck.

7.26 We would suggest that Oxhey, as a distinct settlement, could support a food store of some 2500sqm net or 26910 sq ft net. This would draw back much of the leaking trade from Watford and Hatch End but would not kill the existing convenience trade in the area. Such provision would inevitably have some effect on the existing convenience trade in South Oxhey at present. Certainly we would not expect both the Nisa and Coop stores in Oxhey and the Co-op at Carpenders Park to continue to be able to trade in the face of competition from a new food store operator in a larger store in, or adjacent to, the centre. The following table gives our assessment of how the trade for a new store could be constructed and where the impacts would be felt if this were achieved:

Fig 15 South Oxhey Convenience Store Potential Trade Draw

New Store (Net Sales)	Convenience Sales	Sales Density £/sq m	Turnover	Trade Draw Zone 6	Trade Draw Beyond Zone 6
2500 m ²	2000 m ²	£10150	£20.3m	£16.24	£4.06

7.27 The trade draw from Zone 6 would be made up from retention of outflow expenditure (£12m) and draw from existing South Oxhey and Carpenders Park stores (£4.2m). This would increase the trade retention rates for Zone 6 from £6.12m to £22.36m or bring retention up to 72%. The bulk of trade would be diverted from the large Tesco at Watford (£5m), the Morrisons at Hatch End (£2m) and other large food stores throughout the study area. The draw from the existing local stores would result in the closure of one or more of the Co-ops (£3m) or the Nisa store and this trade would be diverted to the new store. We would also project an impact on the Tesco Express and the smaller stores in the

peripheral parades (£1m) in Oxhey but this would not be dramatic and indeed their staple local convenience store function would remain much as it is.

7.28 The trade draw from beyond Zone 6 (20%) would compare favourably with current patterns where 25 % of the trade drawn to Oxhey originates beyond Zone 6. We would not expect any new store to be open until 2016 and this would benefit from the identified growth both in Zone 6 (£0.8m) and in neighbouring zones. In addition the growth in these Zones will compensate the stores that lose trade to a new store in Oxhey.

Comparison Shopping

7.29 Comparison shopping in Oxhey is extremely limited. In terms of conventional comparison shops there are no multiple traders and no ordinary clothing retailers. The provision is dominated by charity shops. The floor space figures for the centre exaggerate the comparison role of the centre caused by large outlets such as the White Goods appliance centre and Spicer's furniture where footfall and turnover or sales density are likely to be extremely low. In total according to the household survey Oxhey attracts just £3.61m in comparison spend, £2.82m of which is drawn from zones 6 and 7. This represents less than 1% of available expenditure in the study area.

Fig 16 South Oxhey Comparison Shopping Growth

Year	Growth £m	Market Share %	Available Expenditure £m	Floorspace m ² (£5000/sq m)
2010	0	0.79%	0	0
2012	£1.33	0.79%	£.01m	0
2016	£61.39	0.79%	£0.48m	96 m ²
2021	£180.77	0.79%	£1.43m	286 m ²
2026	£332.28	0.79%	£2.62m	524 m ²

7.30 The centre has comparison floor space of 1298 sq m net . This gives us a sales density of £2781 sq m or £258 per sq ft which is very low and suggests why rents need to be as low as £6-£8 per square foot. In respect of the capacity for growth in comparison shopping in South Oxhey, the area (Zone6) generates some £47.9m in comparison expenditure (2012) of which 90% leaks from the area as outflow. Changes in provision here could influence returns but the change needs to be directed at a use or uses that

would attract footfall and these should be in line with the main role and function of the centre.

7.31 Provision of a larger food store in the centre could attract significantly greater footfall to Oxhey and spin-off trade should drive up centre turnover and improve the potential for rents going forward. If no action is taken attraction to the centre and footfall will remain low. New retailers will not be attracted and the comparison sector will dwindle further. Current sales densities are unsustainable and could not support commercial rents.

7.32 New floor-space for comparison shopping in isolation would prove unattractive to operators and the indirect route of stimulating greater footfall through enhanced convenience provision would in the longer term underpin an improvement in comparison shopping performance.

Leisure Expenditure

7.33 Oxhey and Zone 6 generates a leisure spend for pubs, restaurants cafe's and bars of £33.03m of which only £1.74m is spent locally, presumably in pubs, cafes, take away outlets and restaurants in and around the district centre. There will always be a degree of outflow from an area in this sector, given the proximity of London and Watford and the strength of offer in these locations. Nevertheless a better retention level would be expected and with outflow at £31.3m there is certainly capacity for carefully targeted new provision and floor space to enhance retention and reduce outflow.

Key Outlets, Shopping Frontages And Parades

7.34 Appendix 2 to the Site Allocations DPD suggests Primary and Secondary frontages for the Oxhey Centre. The stores on the parade have been damaged by vacancies and shuttered frontages along with the railings preventing access across the road. This could be addressed by improvements to the streetscape coupled with an improved trade draw to the centre provided by an enhanced food store. Any reorganisation of the centre will require a review to set new key frontages. At present the key uses are the Co-op store, the bank, chemists, bakers and grocers that make up the strong local top up convenience offer of the centre.

8.0 Abbots Langley District Centre and Zone 10

8.1 Zone 10 lies to the north of Watford beyond the urban area including Leavesden and straddles the M25. It includes residential areas on the northern side of the Watford conurbation and more rural areas including Abbots Langley, Bedmond and smaller villages. The population centres on two main areas, Abbots Langley and the Leavesden/ Garston area of North Watford. In addition Bedmond Village, which lies to the north of the M25 also contributes.

8.2 In terms of settlement hierarchy, Abbots Langley is centred on a village and high street that has grown with overspill from Watford and Hemel Hempstead. The local populace will look to those two larger centres for main–food shopping, comparison shopping, commercial leisure and employment opportunities. Kings Langley a larger town centre sits within Dacorum district to the north of Zone 10. This part of Three Rivers has only limited links to Rickmansworth.

8.3 Leavesden and Garston areas include the Leavesden Studios film sets and site of the new Harry Potter leisure attraction and Woodside includes the Vue Cinema , bowling and leisure complex. Smaller parades in Abbots Langley, Leavesden and Garston, A tesco Express in Abbots Langley and a convenience store in Hunton Bridge complete the food-shopping offer in this zone.

8.4 Abbots Langley District Centre provides the main shopping destination for weekly and day to day convenience and service retail needs and includes a small Budgens food store, two high-street banks and a range of independent convenience outlets, small shops, restaurants and takeaways.

Retail Provision and Mix

8.5 The following table details the composition of retail facilities and outlets in Abbots Langley.

Fig 17

Use Class/Sub-divisions	Number	Percent	National Chains
A1 Convenience	7	16.2	2
A1 Comparison	11	25.6	1
A1 Service Uses	9	20.9	
A2 Uses	6	13.9	3
A3 Uses	5	11.6	
A4 Uses	0	0	
A5 Uses	4	9.3	
D1 Uses	1	2.3	
B1 Uses	0	0	
Vacant	0	0	
Totals	43	100	11.6%

8.6 With only 43 units Abbots Langley is the smallest of the District Centres in Three Rivers (similar in size to Moneyhill in Rickmansworth). It lies close to both Watford and Hemel Hempstead and residents of this area have good access to these higher order centres. The main outlets in the centre include the Budgens food store, the Martins news agents and convenience store, the Boots chemist and possibly the large electrical shop (Sheffields). There is also a good range of restaurants in the centre indicating a strong evening economy. The national chains and multiples include the two high street banks, Budgens and Boots. This is a limited offer commensurate with the scale of centre. These uses however provide the backbone of the centre's offer including the main convenience outlet and important service outlets and facilities. It is important that these uses are retained in the centre and encouraged to remain.

8.7 There are no vacant properties in Abbots Langley at present and this is a healthy position. The centre is too small to figure in terms of Focus data or rental information but nevertheless 100% occupancy suggests that the centre is in a reasonable condition and that, were there additional units there is a good prospect that they could be let.

Town Centre Environment

8.8 The town centre has emerged along the old Abbots Langley Village High Street and to the north of the current centre many historic properties survive around the Church and former village green. The current centre comprises mostly post war buildings and parades but these are well proportioned, well maintained and in good condition. Overall the centre has a pleasant environment with no obvious failings. The road running through the centre can be busy at times but there are good crossing facilities available. Pavements to the north can be narrow but this is not a major concern. The centre feels safe and secure and is of pleasant appearance. The village hall on the High Street projects and interrupts the commercial frontages but this is not significantly to the centre's detriment.

Rental Levels

As noted above there is no rental data for Abbots Langley available at present.

Parking and Transportation

8.10 The centre only has limited car parking provision including in front of the shops to the south on High Street and to the rear of Budgens. The Council operate a pay and display car park on Abbots Road behind Causeway House but this is separated from the main shopping area. The car park provided for the Pin Wei Chinese Restaurant at the northern end of the town is used informally.

8.11 Public transport is extremely limited with only limited bus services serving the centre. Two regular services connect the centre to Kings Langley and Watford.

Retail Capacity***Convenience shopping***

8.12 Using the household survey we can identify the extent to which users of this zone utilise the facilities in Abbots Langley and where any outflow expenditure goes to. We would anticipate significant outflow to both stores in Watford, particularly at the Dome Roundabout and to stores in Hemel Hempstead. The out of centre Sainsbury store at Apsley through Kings Langley will also be a main food destination.

8.13 Our analysis at table 30 identifies the current provision of retail floor-space in Abbots Langley and clearly shows the dominance of the Budgens food store and out of centre Tesco Express. These facilities offer a benchmark turnover potential of around £6.8m. The results of the household survey suggest that from zone 10 some £8.26m is retained or 23% of available convenience expenditure. This figure chimes with the 25%/75% split between main food and top up shopping. The study also identifies inflow expenditure (mainly from Zone 9) of a further £2.6m giving a total turnover for retail facilities in the Zone of £10.86m.

8.14 The figures suggests that the floor space in zone 10 is over-trading by around £4m or 60%. Over-trading per se is not a particular problem. The Budgens (£5.1m) is doing particularly well. Overall however Zone 10 has an outflow of expenditure (predominantly to main food destinations) of £28.7m. Much of this goes to Asda at the Dome Roundabout in Watford (£9m) Sainsbury at Apsley (£4.9m), Sainsbury Dome Roundabout (£4.7m) and Tesco Hemel Hempstead (£2m). These large out of centre stores provide residents of Zone 10 with good convenience store access. For many residents the superstores at Dome Roundabout are closer to home than the centre at Abbots Langley. Other centres at Kings Langley and St Albans Road Watford will also serve this area well.

8.15 Whilst there may be some scope for additional convenience food development at Abbots Langley, the case here can be differentiated from Oxhey as the settlement here is not as discrete and isolated and much of the population is better related to surrounding centres and stores. Elements of retail capacity here could comprise over-trading in existing stores, outflow and growth. The growth table below shows only very limited potential for new floor space based upon the existing global market share for Abbots Langley of 3.5%. The market share for convenience expenditure retained in zone 10 from zone 10 is around 21.5% currently.

Fig 18. Abbots Langley Convenience Expenditure Growth

Year	Total Growth £m	Market Share	Abbots Langley Area Capacity £m	Floorspace Capacity m ²
2010	0	3.5%	0	
2012	0	3.5%	0	
2016	£8.17m	3.5%	£0.28m	28.17 m ²
2021	£26.17m	3.5%	£0.9m	90 m ²
2026	£45.02m	3.5%	£1.57m	155 m ²

8.16 If we make assumptions about outflow and assume that given the distribution of population throughout the zone that there will always be a significant level of outflow (50%) we can identify a target capacity for floor space potential going forward through the retention of expenditure up to 50% from zone 10 (an increase of 28.5% in the retention of convenience expenditure in zone 10). This results in the capacity identified in Fig 19.

Fig19 Convenience Store Capacity

Year	Growth at 3.5% M/share	Over-trading	Increase in M/Share for Zone 10 to 50%	Total	Floorspace equivalent at £10150 m ²
2012	0	£4m	£9.9m	£13.9m	1369 m ²
2016	£0.28m	£4m	£10.4m	£14.68m	1446 m ²
2021	£0.91m	£4m	£10.8m	£ 15.77m	1554m ²
2026	£1.57m	£4m	£11.5	£17.07m	1681 m ²

8.17 From the above table it can be shown that there is scope to accommodate an additional small food store (up to 1700m²) to serve Abbots Langley district shopping centre. This would assist in retaining leaking expenditure and address growth for the plan period. In identifying this need it should be borne in mind that the need is both qualitative and quantitative in nature and is intended to enhance the role and function of the centre through the retention of more convenience trade within the local area. This level or greater convenience development in a location that drew trade **away** from the centre could cause substantial harm to its vitality and viability through impact on the independent stores and Budgens and would not satisfy the need which is vested in improving the health of the centre and achieving sustainable convenience retail provision.

Comparison Shopping

8.18 Comparison shopping in Zone 10 is predominantly focussed on outlets in Watford and over £38m is spent in the town centre and £5.2m in the retail parks in Watford giving a total of £43.3 of an available £60.3m. A further £4.65m also goes to Hemel Hempstead. Abbots Langley achieves a turnover of £3.29m from zone 10 and £4.99m in total from the study area or a market share of 1%. These figures reflect the aggregate figure for

comparison categories, the global figure from the original comparison responses is even less at £1.65m.

8.19 Looking at the comparison shopping tables we can interrogate which comparison units are attracting shoppers. It is clear that Sheffield's Electrical shop and the Euronics centre are the main draw as £2.59m of the aggregate comparison turnover is derived from electrical goods. Clearly, as with earlier conclusions on comparison shopping, this is an exaggeration although overall the turnover figure for the centre is plausible, it is unlikely to be so concentrated on electrical goods. None of the comparison turnover is derived from clothing and shoes. In terms of the capacity for additional comparison shopping in the centre we would consider that the market share approach would not give rise to any significant need for additional comparison floor space in this centre. Should small schemes for additional shop units come forward they could be supported but there is no need for the Council to plan for or identify additional sites for comparison development to strengthen the comparison role of the centre.

Key Outlets and Key Frontages

8.20 Key outlet for Abbots Langley are the Budgen food-store and remaining banks. Sheffield's Electrical store and the Euronics Centre are also instrumental in attracting trade. The mixed use nature of Abbots Langley is key to its success as the centre blends day to day convenience provision with service uses and some comparison retail to good effect alongside a significant night time economy.

Leisure Expenditure

8.21 Zone 10 generates around £40.88m in leisure spend. Abbots Langley retains some £6.35m in expenditure in pubs, bars and restaurants. This is supplemented by inflow expenditure of £1.7m giving a total leisure turnover for the centre of £8.05m. In addition zone 10 includes the multiplex cinema and leisure complex operated by Vue at Woodside/Garston. This is the most popular cinema destination in the study area attracting over 67% of cinema visits across the study area and 67.2% of bowling visits.

9.0 Zone 1 and Chorleywood District Shopping Centre

9.1 Zone 1 lies to the north and west of the study area. It includes Chorleywood district centre and surrounding town which occupies the southern half of the zone, Loudwater, a leafy residential estate to the east and Sarratt and surrounding small villages to the north. This is an affluent zone on the rural fringes. Chorleywood is a small town centred around a high street and the metropolitan line railway station. There is little or no employment in Chorleywood and the majority of the workforce will commute either into London or to Watford, Uxbridge and Slough. The Zone also includes Junctions 17 and 18 on the M25.

9.2 The boundary to the west comprises Buckinghamshire and the towns and villages of Amersham and the Chalfonts whilst to the south is Rickmansworth and Maple Cross. Loudwater in the east borders Croxley Green and countryside comprising the gap between Rickmansworth, Chorleywood and Watford. Beyond the zone to the north is Kings Langley, Chipperfield and small villages in the Countryside.

9.3 Other than Chorleywood and the Rickmansworth/Loudwater area the majority of this zone is open countryside and the population is fairly dispersed. Most of the zone will look to Chorleywood to provide for day to day and weekly shopping needs although residents in Loudwater may equally look south to Rickmansworth or east to Croxley Green. Higher order shopping centres would include Amersham to the north and the much larger Watford beyond Croxley to the east. In addition to shops in the Chorleywood district centre there are small parades at the Swillett in Chorleywood, and a village shop in Sarratt. The Shell station on the A404 also includes a small convenience store.

Retail Provision and Mix

9.4 The following table details the retail provision in Chorleywood and identifies the number of multiple units and vacancies.

Fig 20 Chorleywood District Centre Uses

Type of Use	No of Units	%	Floorspace	%
A1 Convenience	11	20%	445 m ²	22.5%
A1 Comparison	17	31%	775 m ²	34.2%
A1 Service	13	23.6%	355 m ²	18%
A2 Professional Services	4	7.2%	130 m ²	6.5%
A3 Restaurants	6	10.9%	250 m ²	12.6%
A4 Bars and Pubs	0	0	0	0
A5 Take-away	1	1.8%	30 m ²	1.5%
B1 Offices	0	0	0	0
D1 Medical and public	1	1.8%	30 m ²	1.5%
Vacant	2	3.6%	60 m ²	3%
Total	55		1975 m ²	

9.5 Chorleywood has 55 units in the town centre the largest of which is the Budgens Convenience Store and Poores a DIY and hardware outlet. The centre has a range of additional independent convenience outlets including a baker, grocer, butcher, fishmonger and two delicatessens creating a strong independent convenience retail offer.

9.6 There are presently two vacant units in Main Parade, one a former pet shop, the other a former shipping office (B1). The vacancy rate in consequence is low and the centre appears healthy. There are no multiple outlets in Chorleywood aside from the Budgens food-store which is run as a franchise. Sevenoaks Sound and Vision is a small high-end chain of electrical retailers and the Novo Aqua bathrooms is one of several outlets in this bathrooms chain. Poores, the hardware store is a part of a small local chain in this area and is a key part of the centres' overall retail offer. Chorleywood Sports is a specialist independent sports shop and something of a rarity. This shop is backed by a specialist internet site for goal-keepers sports equipment.

9.7 The centre is well provided with A3 outlets including the restaurants and coffee bars. Both delicatessen premises also double as coffee bars and sandwich shops giving the centre a reasonable level of activity during the day time.

9.8 The centre retains only one high street Bank, the Natwest, and it is important that this facility is kept. Loss of the bank would reduce significantly the ability of Chorleywood to fulfil the full range of day to day and weekly shopping and service functions required of a district centre. Both Barclays and Lloyds have withdrawn from the centre in recent years so retention of this branch should be a priority.

Town Centre Environment

9.9 Chorleywood shopping centre is divided into two distinct areas separated by Shire Lane which runs between the two. To the west of Shire Lane are two post-war parades of shops with flats over comprising some 27 retail outlets in two opposing parades (Main Parade and New Parade). These are fronted by service roads which include on-street car parking. The environment is well maintained with good quality street works, furniture and planting creating a pleasant shopping environment. A pedestrian crossing links across Shire Lane to Lower Road which includes a range of short parades of shops on both sides separated by houses and flats. This area is less compact but again enjoys a good environment with on-street parking to meet shopper needs. Budgens, the centre's main convenience outlet sits centrally located whilst Poores anchors the eastern end of Lower Road. The District Centre's only bank (Natwest) is located in this area.

9.10 Overall Chorleywood has a pleasant character and environment. Whilst the main shopping streets and stores are mostly post war developments, the centre retains a village character and small scale domestic feel.

Rental Levels

9.11 Chorleywood enjoys rental levels at around £30-£40 per sq ft. Which falls lower than Watford (£80-90) and Rickmansworth (£50-60) but is ahead of Oxhey (£5-18). The centre has low vacancies and a good character and environment and represents a reasonably safe location for investment.

Parking And Transportation

9.12 Car parking in Chorleywood is predominantly on street along Lower Road or in the service roads at Main Parade and New Parade. Parking is not generally a problem though at weekends fly-parking on residential streets near to the shops can be a problem. There is a car park to serve the town centre but this is remote, at the southern end and rarely used by shoppers. Chorleywood station has an extensive car park but this is generally full during the working week with commuters travelling into London.

9.13 Public Transport in Chorleywood is limited with only one regular bus service serving the settlement beyond school services. This links Chorleywood to Rickmansworth, Watford and Amersham and operates hourly during the day time only on Monday to Saturday. The town is also served by the Metropolitan Line (Underground) and Chiltern Line (over-ground) rail services to London from Amersham.

Retail Capacity

Convenience Retailing

9.14 Applying the results of the household shopping survey indicates that Chorleywood retains some £5.6m from Zone 1 in convenience expenditure and £5.8m in total. This is primarily in Budgens but “local shops” also attract considerable trade from the household survey. Our capacity table (32) identifies that the stores in Chorleywood have a benchmark or potential turnover of around £2.66m which suggests that the existing convenience outlets in Chorleywood are turning over considerably in excess of predicted benchmark turnovers. The majority of this trade is in top up shopping or basket shopping as, in terms of main food shopping, the bulk, as identified by the household survey (Table16) is lost to Rickmansworth (58%), Tesco, Amersham (8%) and other large stores in Watford (10.4%).

9.15 Elsewhere in Zone 1 there are very limited convenience shopping opportunities and little is retained beyond this district centre. Convenience expenditure outflow from zone 1 amounts to 75% or £17.94m reflecting the main food/top up shopping split. As noted much of this supports convenience shopping in the neighbouring zone (Rickmansworth) and this supports the shopping hierarchy where Rickmansworth is recorded as an higher order centre. Indeed many residents to the south of the zone would naturally look towards

Rickmansworth for their shopping rather than Chorleywood as it is nearer or more easily accessed.

9.16 In terms of Market Share, Chorleywood attracts some 1.87% of available expenditure in the study area. The following table identifies how this translates into expenditure capacity to support new convenience floor space.

Fig 21 Chorleywood Convenience Expenditure Growth

Year	Total Growth £m	Market Share	Chorleywood Area Capacity £m	Floorspace Capacity m ²
2010	0	1.87%	0	
2012	0	1.87%	0	
2016	£8.17m	1.87%	£0.15m	15 m ²
2021	£26.17m	1.87%	£0.49m	48 m ²
2026	£45.02m	1.87%	£0.84m	83 m ²

9.17 In earlier chapters the presence of significant out-flow from a zone has been used to identify capacity for development in a centre (South Oxhey). We do not consider this to be appropriate here. The population of this zone is skewed between Chorleywood and Rickmansworth, Croxley Green and the rural areas to the north. It does not relate well to any single centre and its capture by a variety of different centres is largely appropriate. Unlike Oxhey, Zone 1 does not comprise a discrete settlement that can be easily identified or that should naturally look toward any single shopping centre for its day to day and weekly shopping needs. The population of the zone are largely mobile and, so long as facilities in Chorleywood can continue to meet day to day and weekly needs for that towns population, then there is no need for significant additional convenience provision to serve this area or zone.

9.18 The convenience stores in Chorleywood all appear to be trading very well and additional convenience provision within the centre should be welcomed. The village centre however does depend on its convenience trade for vitality and viability and the independent retailers especially will be vulnerable to threats from out of centre provision should it emerge.

Comparison Shopping

9.19 Chorleywood has a very limited comparison shopping offer (17 units, 675 m²). This is anchored by the presence of Poores the hardware store, the two pharmacies, the bookshop and Sheraton furniture. As noted at section 3 of this study, the household survey results can sometimes exaggerate particular aspects of a centres turnover based on the questions asked. In this instance the response on where people carry out their shopping for books, CD's, toys etc gives a disproportionate view of Chorleywood's trade based on its bookshop. According to the household survey, the centre attracts some £3.3m in this category which in our view represents a significant over-estimate.

Nevertheless this will be balanced against under-recording in other categories and overall we would expect the figures to balance out. Overall the comparison turnover from the household survey on the aggregate of separate categories is £6.43m across a floor space of 775 m² giving a sales density of £8269/ m². This still feels like an over-estimate in turnover for this small centre but does indicate a healthy trading position for Chorleywood.

9.20 To cross-check, if we look at the single comparison shopping response (table 17) we can see that Chorleywood attracts £3.74m in turnover, perhaps a more accurate reflection and one that gives the centre a sales density of £4825/ m². Taking a sales density within this range would be a conservative and robust position and would indicate a solid trading performance for the centre.

9.21 The market share for Chorleywood (using the aggregate analysis) in comparison goods is only 1.29% of total available comparison expenditure. Outflow from the Zone is £33.65m or 86%. The bulk of this is attracted to Watford (£25.88m/66%). The table below details the potential for additional floor space arising from growth in population and expenditure .

Fig 22 Chorleywood Comparison Expenditure Growth

Year	Growth £m	Market Share %	Available Expenditure £m	Floorspace m ² (£5000/sq m)
2010				
2012				
2016	£61.39	1.29	£0.8m	158 m ²
2021	£180.77	1.29	£2.3m	466 m ²
2026	£332.28	1.29	£4.3 m	857 m ²

9.22 The table identifies some very limited scope for additional comparison floor space in Chorleywood. The character, role and function of the centre however are unlikely to change and Chorleywood will not become a destination for significant comparison shopping. Indeed any significant increase in comparison shopping here could create an imbalance with respect to Rickmansworth that would be out of kilter with the shopping hierarchy. Limited development that had no significant impact on the comparison shopping patterns or the hierarchy of centres should be permitted. None is *required* at present.

Key Outlets and Retail Frontages

9.23 Key uses to protect in Chorleywood include Budgens, Poores, the Natwest Bank and Post Office along with the Bookshop, which through a wide outreach programme promotes a literary festival in Chorleywood that raises the profile of the town beyond its standing and attracts visitors to the centre through-out the autumn. The independent food sector in Chorleywood is also strong and the fishmongers, butchers and bakers and delicatessen are an important part of the offer that makes the centre attractive.

Leisure Expenditure

9.24 Chorleywood has little in the way of leisure provision other than the 6 restaurant outlets (Peppermill, Saathi, Sujoy, Kai, Roots Lounge, Manna Cafe). Beyond the town centre Chorleywood has a number of public houses (7) which incorporate restaurant facilities and these attract a significant amount of business. This zone gives rise to a total of £26.4m in leisure spend of which some £15.27m is spent in pubs and restaurants. £5.3m is retained in Chorleywood and a further £1.4m retained in the wider area (Sarratt) from Zone 1. Inflow to the zone amounts to a further £5.3m giving a total turnover for pubs and restaurants in this zone of £12m. This makes it an important feature in the local economy and a strong and positive part of the local community. Outflow in leisure expenditure is some £19.7m which includes commercial leisure (cinema's, bowling, theatre) and travel to sports clubs etc.

10 Zone 4 and Croxley Green

10.1 Zone 4 includes the urban areas of Croxley Green and the green wedges that separate Croxley from Watford incorporating Cassiobury Park in Watford and the Croxley Moors. The smaller residential area of Moor Park, bordering Watford and Rickmansworth also falls into this zone. The main centre of population is Croxley Green and this can be viewed as a distinct and discrete settlement. There is no single identifiable shopping centre but the area around the Metropolitan Line station on Watford Road and an area on New Road can be aggregated together to form a functional centre.

10.2 Additional small parades of shops can be found in the wider area on Baldwins Lane, and at the “Green”. The Retail Allocations in the Site Allocations DPD, part of the Local Development Framework designates the area on Watford Road, around the tube station as a local centre and similarly the shops on New Road are identified as a separate local shopping centre. For the purposes of this chapter when we refer to the centre at Croxley Green we are referring to both the Watford Road and New Road areas shown on our plans at map 16 and map 17 of appendix 5.

10.3 Moor Park has a separate and isolated parade of shops which serves that area as a separate settlement for top up shopping and limited services.

10.4 The area is closely related to Rickmansworth to the west and Watford to the east. Links north and south are more complex and are constrained by the countryside to the north and canals and railway lines to the south.

Croxley Green Local Centres (Watford Road and New Road)

10.5 The following table identifies the range of uses in the two main retail areas for Croxley Green.

Fig.23 New Road and Watford Road centre uses.

Use	Watford Road	% Units	Floor-space	New Road	% Units	Floor- space Sq m
A1 Conv	4	16.6	140 m ²	3	16.6	220 m ²
A1Comp	3	12.4	110 m ²	6	33.2	150 m ²
A1 Service	8	33.3	290m ²	3	16.6	80 m ²
A2	1	4.1	40 m ²	3	16.6	100 m ²
A3	2	8.3	80 m ²	0	0	0
A4	1	4.1	200 m ²	0	0	0
A5	4	16.6	120 m ²	1	5.5	0
D1	2	8.3	60 m ²	3	16,6	80 m ²
Vacant	1	4.1	40 m ²	0	0	0
Total	26		1080 m²	19		630 m²

Fig 24 Combined Centre

Use Classes	Total	%	Floorspace
A1 Convenience	7	15.5	330 m ²
A1 Comparison	9	20	260 m ²
A1 Service	11	24	370 m ²
A2	4	8.9	140 m ²
A3	2	4.4	80 m ²
A4	1	2.2	200 m ²
A5	5	11	120 m ²
D1	5	11	140 m ²
Vacant	1	2.2	40 m ²
Total	45		1680 m²

10.6 The combined centre shows a good mix of both convenience and service uses with a low level of comparison retailing. In addition the centre has a limited range of A2 uses but no banks or building societies and without these it cannot properly be argued to fulfil the day to day and weekly shopping needs of the local population. Its designation as local parades therefore is appropriate as, even aggregated as one centre, it will not perform the role of a district centre.

10.7 In addition to the local centres listed above Croxley has four further parades of shops including those around Scots Hill/ The Green which includes some 6 units and a public house and incorporates a Costcutter convenience store; a parade at the western end of Baldwins Lane which incorporates a green grocer, and a small post office; a parade at the eastern end of Baldwins Lane which incorporates another convenience store (Spar) and a parade on Watford Road adjacent to a filling station that incorporates an element of convenience shopping. In total these parades add an additional 21 units, two of which (on Baldwins Lane), are currently vacant.

Local Centre Environment

10.8 Considering the Watford Road environment this is generally poor. The centre is spread out in linear form along Watford Road with a significant gap in the middle as the centre is divided by the railway lines. The station and associated forecourt are provided here but this is on the opposite side of Watford Road to the retail outlets. Watford Road itself is busy in character and a part of the designated trunk road network (A412). As such it has a negative effect on the environment of the shops and prevents road side parking and good pedestrian or vehicular access.

10.9 The centre does include a small public car park, separated from the shops by the A412 and accessed via a pelican crossing. The Red House public house and restaurant is also separate from the retail parades and lies adjacent the car park and crossing.

10.10 The second part of the Croxley Centre lies on New Road some 200m from the Watford Road shops and the station. New Road is quieter and traffic calmed with road humps but the shops are strung out over a considerable stretch of the road interspersed with residential uses and a public house and library. The main concentration of shops includes the anchor unit, a small supermarket operated by the Co-op. Because of the disjointed nature of the shopping areas in Croxley Green it does not function effectively as a centre but the shops and outlets do combine to give local residents good access to basic shopping and retail services. Despite its trading location and drawbacks vacancies in the area are limited

Croxley Green Retail Shopping Patterns

Convenience Shopping

10.10 Croxley Green as a discrete area has a population of some 12,307 in 2012. This generates a convenience spend of some £22.94m. Of this some £3.86 is retained in the designated centres from Zone 4 and a further £0.8m is retained in Zone 4 by stores not in the defined local centres. In total the convenience stores in Croxley Green attract some £6.2m in total convenience expenditure from the study area. This implies that the existing convenience floor space in the study area is trading very well. The equivalent benchmark turnover for this space is around £3.45m (table 34). Whilst this picture suggests that Croxley is well provided for local convenience shopping this overlooks the significant outflow of main food expenditure from zone 4 to stores in Watford (£6.3m) and Rickmansworth (£9.45m).

10.11 These flows alone however are insufficient to justify significant additional food provision. The local convenience market in Croxley is well catered for as noted already. There also remains an outstanding planning permission for Tesco to develop an Express store of 300 sq m net on the Watford Road. This consent lapses in October 2012. If this is not built out, there remains scope for additional local convenience provision to soak up an element of the over-trading of the local stores. The leakage of expenditure is focussed very much however on main food trade. An entry level main-food store would have a turnover of around £20m which is in excess of the leakage from Croxley Green. The step change in scale necessary for a store to attract back the trade leaking from Croxley Green would be too large and would require a trade draw from both Watford and Rickmansworth which is both unnecessary and unsustainable in character. The zone itself is of insufficient size to support a large food store that would fulfil a proper main food shopping function.

Comparison Shopping

10.12 There is no significant comparison shopping market in Croxley Green and there is no need of provision. The Town Centre at Rickmansworth and the regional centre in Watford alongside the associated out of town developments mean that Croxley Green Shoppers are well placed to take advantage of existing comparison shopping provision in the area. Whilst some low level of provision could be made in the area it would appear unnecessary and

indeed uneconomic. No large scale comparison shopping provision should be promoted or permitted in Croxley Green as this would be both outside the shopping hierarchy and unnecessary in terms of local access to excellent comparison retail facilities a short distance away in Watford.

10.13 The convenience stores in Croxley Green provide a good level of service to the zones population. Beyond the district boundary with Watford there are proposals for a local centre to be created at Ascot Road. Whilst provision of a local centre here would not cause any impacts to Croxley Green the prospect of larger scale retail provision here would pose a threat to some local shops including those on Watford Road and Baldwins Lane.

Key Shopping Facilities and parades

10.14 The appendices to the Sites Allocations DPD identifies the parades of shops on Watford Road and New Road that comprise the two local shopping centres. In our view these could be amalgamated into a single entity albeit one that should not be of any higher order than local centre. The absence of retail banking facilities and a wider comparison or service offer mean that Croxley serves only a limited day to day retail function and whilst this should be maintained and protected there is no quantitative or qualitative need for further retail development to serve these local needs.

Leisure Expenditure

10.15 Croxley Green has a developed network of public houses serving the local catchment area including pubs on the Green (Artichoke and Coach and Horses) and in the urban area (Sportsman, Red House, Two Bridges and Fox and Hounds). These include both traditional pubs and “food pubs”. There is only one Restaurant in the area (Standard Tandoori) but there are a large number of A5 outlets and take-aways serving the local population. The household survey identified that some £11.3m in leisure spend is attracted to pubs, restaurants and takeaways in the Croxley Green area which indicates a strong level of retention, particularly given the strength of offer in both Rickmansworth and Watford. These facilities often play a strong role in the local community and their loss should be resisted.

11.0 Retail Patterns in the Remaining Zones

Zone 3

11.1 Zone 3 encompasses the area to the south of Rickmansworth including Maple Cross, West Hyde, Harefield and parts of Denham stretching along the Colne Valley towards Uxbridge. This part of the study area is predominantly countryside with the largest settlement being Harefield, a tight village centre surrounded by post war residential estates that lies within the London Borough of Hillingdon. This is followed in size by Maple Cross, an area of largely post-war housing, much of it originally built as social housing. The zone includes an extensive employment area along the A412 Uxbridge Road which includes the headquarters in the UK of Renault and Nissan. Behind this to the south is the Maple Lodge sewage treatment works, a site identified in the Three Rivers Core Strategy for employment development. Further to the west lies Denham, in Buckinghamshire, a relatively affluent village surrounded by countryside. This zone falls mid-way between Watford and Uxbridge and residents here can look in either direction for employment, leisure and higher order shopping facilities.

11.2 Shopping in the zone includes a small parade of 3 shops at Maple Cross within Three Rivers which includes a news-agents, a cafe, and a chip shop. This is the only provision serving this settlement and shoppers must travel into Rickmansworth (or Harefield) for their day to day and weekly shopping and service needs. Outside Three Rivers but within this zone there is a small village centre at Harefield including a Tesco Express and a limited range of convenience shops, service outlets, cafes and restaurants and pubs. Provision overall is extremely limited. The Zone has a population of some 10,322 people and generates a convenience spend of £19.24m (Table 3). Only some £2.44m of this is retained in the zone, the majority of which is spent in Harefield. The majority of the spend is directed to Tesco in Rickmansworth (£6.13m) or stores in (£3.2m) Uxbridge and Rickmansworth town centre (£2.12m).

11.3 The level of provision here is below that which would be expected, particularly with regard to Maple Cross where the provision is extremely limited and residents do not have convenient access to an appropriate level of local facilities. Unfortunately there is no “centre” in Maple Cross barring the parade of three shops. The adjacent public house has recently closed and been converted to residential use. There is scope, from outflow

expenditure, to support a convenience store within the Maple Cross settlement. An appropriate location would be close to the existing facilities as they sit close to the main concentration of residents. The Council need to consider the potential to allocate a site for a small convenience store to serve this settlement.

11.4 No comparison shopping is retained in Zone 3. The majority of spend is directed towards Uxbridge (£16m), Watford (£10m) and Rickmansworth (£4m). There is no scope for comparison shopping needs to be met locally here. The leisure spend from zone 3 is mainly directed towards Harefield (£3m) and Rickmansworth (£1.5m). Harefield enjoys a number of pubs with food services both in the centre and in the surrounding countryside.

Zone 5

11.5 Zone 5 sits to the east of Rickmansworth and incorporates housing areas around Northwood, a London suburb predominantly in the London Boroughs of Harrow and Hillingdon. The northern parts of the zone includes Northwood town centre and Northwood Hills District Centre. Northwood town centre is anchored by a Waitrose foodstore and a limited range of other convenience outlets. Few shoppers here look towards Three Rivers to satisfy their shopping needs although there is limited convenience shopping in Rickmansworth (£3.45 Tesco/Waitrose and Town Centre), the bulk goes to Waitrose in Northwood (£15.65m) and stores in Pinner (£3.67m). Comparison shopping from this zone tends towards London centres including Harrow, Uxbridge and an element of trade goes to Watford.

11.6 Despite the close relationship between this zone and the Oxhey area, almost no expenditure leaks into Zone 6 for either comparison or convenience shopping.

Zone 7

11.7 Zone 7 forms part of South Watford and abuts the Oxhey area. It includes areas adjoining Croxley Green to the west, Moor Park and Oxhey to the south. The Zone includes Watford town centre and the retail parks at Waterfields Way and Bushey Arches so not surprisingly the majority of business from this Zone is retained in Watford (£41.5 of £53.3m). There is an amount of convenience outflow into Oxhey £2.36m and for some residents of this zone Oxhey will be their nearest shopping centre. For comparison

shopping a similar picture emerges with the bulk (£74.82m or 90%) being spent in Watford. Again some £1.26m is also spent in Oxhey and this represents the biggest zone for inflow to Zone 6. This expenditure is important in maintaining turnover levels in the Oxhey centre.

Zone 8

11.8 Zone 8 comprises the centre and north of Watford abutting Three Rivers around Leavesden and Garston. Shopping in this zone is predominantly carried out in Watford with £39 m of £41m in comparison shopping and £25m of £27m being spent in the town.

Zone 9

11.9 Zone 9 represents the rural areas to the north of the district taking in Chipperfield, Kings Langley, Apsley and villages to the south of Hemel Hempstead. The zone has a population of 21,000 people mostly located in either suburbs of Hemel Hempstead or settlements along the A41/Grand Union Canal Corridor including Kings Langley and Apsley. For shopping the majority of residents here will look towards Hemel Hempstead or Watford which attract the bulk of both convenience and comparison shopping trade. The zone also contributes however some £1.52m in comparison expenditure to Abbots Langley and £1.11m in convenience expenditure to the district centre. Most convenience trade for main food shopping however is directed toward the Sainsbury, located in the zone at Apsley (£18.48m or 45%) and the Tesco in Hemel (£7.17 or 18.8%). For day to day and weekly needs Kings Langley district centre in Dacorum district provides the main destination and this is appropriate in terms of the retail hierarchy.

12.0 Summary of Retail Capacity for Three Rivers

12.1 This study has reviewed the retail capacity of Three Rivers District on a centre by centre basis taking account of the needs of each distinct shopping area and determining what level of provision the centre provides and what it may support in the future. This study should be seen as a starting point for planning for the future retail provision in the district.

12.2 The individual areas for growth the study has identified include planning for a new superstore to anchor the centre at South Oxhey, to draw back leaking trade and to sustain what is an otherwise failing centre.

12.3 For Rickmansworth in the long-term there is some scope for modest convenience growth but this should be limited within the levels identified in this study to 2025.

12.4 For Abbots Langley the picture is slightly different. The area is well served by large superstores in Watford, in particular the Asda and Sainsbury at the Dome Roundabout and the large stores in Hemel Hempstead and Apsley. Nevertheless there is some convenience capacity in the zone to support a new convenience store in the town centre itself to enhance trade retention and support the vitality and viability of the centre overall.

12.5 For Maple Cross we would recommend the allocation of a site for a small convenience store to serve the local residents who do not have easy and convenient access to an appropriate level of retail and service provision.

12.6 There is no need for additional comparison shopping provision in the district although there is capacity which is elastic. Any growth in this area will serve to reduce the leakage of trade to larger centres but developments proposed should be “in centre” so as to avoid the risk of harm to what are a range of fairly sensitive comparison outlets within the network of existing centres.

12.7 As a final exercise and sense check of this assessment the following table identifies the market share for Three Rivers District from the study area for both comparison and convenience goods and projects the growth in expenditure available to the district from its

current global market share. Currently Three Rivers retains some £101.55m in convenience expenditure arising in the study area equivalent to 32.7% market share.

Fig 25 Three Rivers District Wide Convenience Capacity

Convenience Goods	Growth (cumulative)	Market Share (Three Rivers)	Expenditure Capacity	Floor-space
2012	0	0	0	0
2016	£8.17	32.7%	£2.67m	263
2021	£26.17	32.7%	£8.55m	843
2026	£45.02	32.7%	£14.72m	1450

12.8 This shows convenience growth for the district of a maximum of 1450sq m by 2025 arising from increases in expenditure and population. This is the equivalent of less than one new food superstore in the district in the plan period. This market share approach should be contrasted with the approach for each centre where greater capacity has been identified in key locations to achieve more sustainable shopping patterns, improvements to the health of centres and increased market share.

12.9 The position for comparison retailing based on market share is shown below. Currently Three Rivers retains only £26.27m in comparison expenditure or 5.26% of the available expenditure in the study area.

Fig.26 Three Rivers District Wide Comparison Capacity

Comparison Goods	Growth (Cumulative)	Market Share	Expenditure Capacity	Floor-space
2012	0	0	0	0
2016	£61.39	5.26%	£3.23m	645 m ²
2021	£180.77	5.26%	£9.5m	1901 m ²
2026	£332.28	5.26%	£17.4m	3495 m ²

12.10 The table shows a need arising from growth for a further 645 sq m of comparison retail space by 2016 and 1901 by 2021 across the district. This reflects the methodology used in the 2007 study by CBRE however this should not be considered in isolation from the context relating to the role, function and health of the existing centres.

12.11 In conclusion, whilst using a modified methodology to the 2007 study, the results of this study broadly correspond with the former in relation to quantitative requirements:

- Comparison Goods: no need to plan for any significant increase over the plan period.
- Convenience Goods: only a modest increase should be considered in Rickmansworth, Abbots Langley and Maple Cross. Provision in South Oxhey should also be re-balanced to assist with the regeneration of the centre.

12.12 The study generally supports the Council's retail policy as set out in the Core Strategy and emerging Site Allocations document.