# Retail and Town Centre Study Update 2019
# FINAL REPORT

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# Appendices

# 1. Introduction

In 2015, Cushman & Wakefield prepared the 'Retail and Town Centre Study' (RTCS) for the Royal Borough of Windsor and Maidenhead (RBWM). The purpose of that study was to provide a new evidence base for the retail and town centre policies to be included in the forthcoming Borough Local Plan.

Cushman & Wakefield has been instructed by RBWM to undertake a partial Update of the RTCS, to provide up-to-date evidence in the preparation of the new Borough Local Plan. It takes into account the events and other material considerations since the RTCS was completed in 2015. These include:

- The publication of the revised National Planning Policy Framework (NPPF) in February 2019 and the Planning Practice Guidance (PPG) relating to *Town centres and retail* on 22 July 2019. Notwithstanding, it is understood that the new Borough Local Plan will be examined under transitional arrangements and thus the 2012 NPPF and PPG will apply;
- The continued evolution of the retail landscape, with an increasing number of retailer administrations and company voluntary arrangements (CVAs), and the implications for town centres;
- The impact of retail trends and economic conditions on shopping habits and future retail floorspace 'need' or capacity; and
- Changes in retailers' sales densities.

It should be noted at the outset that this Update study does not provide a full and comprehensive review of RBWM's previous evidence base set out in the RTCS. For example, it does not include up-to-date 'healthcheck' assessments of the Borough's centres; and it draws on the results of the 2015 household interview survey of shopping patterns as used to inform the RTCS. We would therefore advise RBWM to commission a new household interview survey for any future update on retail floorspace capacity.

Notwithstanding, this Update study is based (insofar as possible) on the most robust and reliable data available.

The remainder of this report is structured as follows:

- **Section 2: Basis of Updated Retail Capacity Forecasts** – we describe the basis of our updated retail capacity forecasts, and the data inputs and assumptions on which these are based.
- **Section 3: Quantitative Capacity for New Retail Floorspace** – we set out and describe the up-to-date retail capacity forecasts for the Borough.
- **Section 4: Review of Potential Development Opportunities** – we provide a commercial overview of potential development sites for retail and mixed use development.
- **Section 5: Shopping Frontage Designations** – we recommend shopping designations for the Borough's centres including primary/secondary frontages and Primary Shopping Areas.
- **Section 6: Summary & Recommendations** – we outline the main findings of our Update study and the implications for retail planning and development in the Borough.

# 2.    Basis of Updated Retail Capacity Forecasts

For the retail capacity forecasting in this Update study, we have used our RECAP retail capacity forecasting Model. It allocates growth in expenditure from catchment zones to shopping destinations based on shopping patterns indicated by the 2015 household interview survey, and informed professional judgements about how these are likely to have changed since 2015.

We have modelled the following shopping destinations:

- Windsor Town Centre;
- Maidenhead Town Centre;
- Ascot District Centre;
- Sunningdale District Centre; and
- Non-central stores in Borough.

The RECAP Model forecasts the expenditure-based capacity for additional retail floorspace in the following way:

- Calculate the total amount of convenience and comparison goods expenditure which is available within the 9 zones comprising the catchment area;

- Allocate the available expenditure to Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores[1] in Borough (based on the results of the 2015 household interview survey of shopping patterns); so as to obtain estimates of current sales and forecast future sales in each shopping destination; and

- Compare the estimated sales in Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores in Borough with existing floorspace; so as to assess the current trading performance of each shopping destination, and the capacity to support further growth in convenience and comparison goods floorspace.

The RECAP Model (like any other forecasting model of this type) is an exploratory tool, rather than a prescriptive mechanism.  Thus the resulting forecasts serve as a realistic guide to planning policies and decisions on planning applications.  Separate (Scenario 1) capacity forecasts have been prepared for Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores in Borough; in order to assist RBWM with identification and testing of alternative options for the town and district centres, developing a preferred strategy and formulating policies for new retail floorspace.

We must also point out that this Update study is based on the household survey of shopping patterns conducted approximately four years ago. To compensate for this, we have adjusted the market shares indicated by the survey results where necessary (as discussed below), and are satisfied that the RECAP Model and its retail capacity forecasts are realistic for the purposes of plan preparation for which the Update study has been commissioned.

When using the retail capacity forecasts as a guide to future planning policies, it is also important to remember that the further ahead the forecasting date, the less certain the forecast.  Thus the forecasts for 2024 are more robust than those for 2029.  So as to cover the forthcoming plan period, and for 2036, we suggest that forecasts such as these are treated with a significant degree of caution, since they only indicate the broad order of magnitude of retail capacity at these dates, if all

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[1] Including stores outside of the defined town/district centres.

of the forecast trends occur.  There are also particular challenges at the present time with the ongoing structural change in the retail sector, in addition to the uncertain economic outlook. Furthermore, long term growth in the use of internet shopping is unknown (although an assessment has been made in this Update study), and reinforces the need to revise the forecasts of retail floorspace capacity in the next five years.

We described below the principal data inputs, the scenarios assessed, and the format of the RECAP Model tables.

**Principal Data Inputs**

The principal data inputs (and assumptions) used for this Update study have been obtained from reliable sources and are as up-to-date as possible; while our interpretation and analysis of such data is based on our professional judgements, in the light of our extensive experience of retail capacity forecasting. The retail capacity forecasts set out and described below are compliant with the NPPF and accompanying PPG; and comprise a robust retail evidence base for the emerging Borough Local Plan.

*Catchment Area*

For this Update study we have used the same catchment area as we used for the RTCS. This catchment area was divided into 9 catchment zones. A map of the catchment area showing these 9 zones is included at Appendix A.

*Base and Forecasting Years*

We have used 2019 as the base year for our forecasts. The RECAP Model therefore provides estimates of the current retail sales in Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores in Borough as at 2019.  As instructed by RBWM, we have prepared capacity forecasts at 2024, 2029, 2033 and 2036, so as to cover the forthcoming plan period and for 2036.

*Catchment Population*

The starting point for the population forecasts was a report, dated October 2019, commissioned from Pitney Bowes on the current and projected future population of each catchment area zone. These population forecasts cover the period up to 2029; and we have therefore extrapolated them to 2033 and 2036 by trend projection.  The result is that for the catchment area as a whole the population is expected to increase from 482,776 in 2019 to 533,768 by 2036, which is an increase of about 10%.

The 9 catchment zones adopted for the purpose of this Study are based on postcode geography and do not match local authority administrative boundaries.  They cover and extend beyond RBWM's local authority boundary to reflect shopping patterns in the catchment area (i.e. the area from which the Borough's shopping destinations[2] capture significant market shares of available expenditure).

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[2] The catchment area is also wide enough to cover Slough Town Centre's catchment area (as required for the RTCS).

*Price Basis*

All monetary values in this Study are in constant 2017 prices, unless otherwise stated, so as to exclude the effects of price inflation.

*Per Capita Expenditure*

For this Update study, we obtained from Pitney Bowes a report setting out estimated average per capita expenditure on convenience and comparison goods in each catchment zone for the years 2016, 2017 and 2018, together with forecasts for 2023, 2028 and 2029. These estimates and forecasts take account of differences in average per capita expenditure on convenience and comparison goods from zone to zone. We have used these figures as the basis for our base year (2019) estimates and new forecasts. For the forecasting years of 2019 and 2024 we interpolated between the Pitney Bowes figures; and for our forecasting years of 2033 and 2036 we applied trend extrapolation to the Pitney Bowes figures. The resulting estimates and forecasts of per capita expenditure on both convenience and comparison goods, including expenditure on Special Forms of Trading, are set out in the top half of RECAP Model Table 2 in Appendix B.

The forecast growth in per capita expenditure in RECAP Model Table 2 is specific to the catchment area; the use of such local growth forecasts is expected to be more reliable.

*Special Forms of Trading including internet shopping*

We have made deductions from the per capita expenditure figures supplied by Pitney Bowes to allow for expenditure via special forms of trading (SFT). This includes mail order, vending machines, party plan retailing, on-line shopping via the internet or interactive TV, and expenditure at temporary market stalls; and is therefore expenditure not made in retail shops. RECAP Model Table 2 shows the growing deductions which we have made, based on information for the UK published by the Office for National Statistics (ONS); and forecasts by Oxford Economics published in the Pitney Bowes 'Retail Expenditure Guide' 2019/20.

We have therefore applied an SFT deduction of 6% for convenience goods expenditure in 2019, increasing to 8% by 2036, as indicated in the table. Our SFT deductions for comparison goods expenditure are much greater; from 17.5% in 2019 to 22% by the end of the forecasting period.

*Shopping Patterns in the Catchment Area*

For this Update study, we have used the results of the RBWM household interview survey of shopping patterns in the catchment area – the results of which are included in the RTCS. It covered the area shown on the map in Appendix A, which was divided into the 9 catchment zones shown on that map. A description of the survey and how the results were used in the RECAP Model is also included in the RTCS. The results of the survey have been used in the same way in this Update study, with market share corrections as described below.

*Market Share Corrections*

The 2015 household interview survey provides a detailed picture of where households in each of the 9 catchment zones do 'most of' their shopping for convenience goods and the 8 different categories of comparison goods. This is common practice for a survey of this nature, since it is not practical to ask respondents to quantify how much they spend on convenience goods and the

various categories of comparison goods, and where and how often. Thus the results of the household interview survey do not directly indicate actual expenditure flows, but are the best available data to use as a proxy for modelling retail expenditure flows from residential areas to shopping destinations. However, like all such surveys, this means that its results cannot be applied uncritically in the RECAP Model. Thus for example, in our extensive experience, such surveys (undertaken by ourselves and by other consultants) tend to over-emphasise comparison goods shopping in large centres, and under-represent it in small centres[3]. The main reason is because in a small sample survey, the probability of interviewing the small number of people who use small centres is much less than the probability of interviewing the much larger number of people who use larger centres.

It is therefore sometimes necessary to introduce market share correction factors; so as to transfer expenditure in the Model from one or more locations to others, to balance (or calibrate) the Model and make it represent reality more accurately. This is not uncommon[4], and is particularly necessary in this case given the household survey was conducted approximately four years ago.

These market share corrections do not alter the centres or retail parks themselves in any way, but are simply a means of calibrating the Model to make it as realistic as possible a representation of actual expenditure flows. There is an approximate correlation between centre size and average sales density, with larger centres generally having higher sales densities than smaller centres (and hence higher shop rental values). This experience has informed our judgements about the market share corrections needed to make the RECAP Model a realistic representation of sales in the Borough's shopping destinations.

Thus for Maidenhead Town Centre, for example, use of the comparison goods market shares from the 2015 household interview survey without correction would result in an unrealistically low sales density for the town centre; in view of the size of the town centre and its comparison goods retailers. Respondents to the survey were asked where they do 'most of' their shopping for the 8 categories of comparison goods. However, we consider that the uncorrected survey results have under-estimated the scale of expenditure in Maidenhead Town Centre. We have therefore increased the survey-indicated comparison goods market shares for every catchment zone by the market share correction factor of 120% indicated in the header to RECAP Model Table 16 (i.e. we have increased them by 20% from the no-change default factor of 100%), in order to make the Model represent reality more accurately. In terms of convenience goods market shares in Maidenhead Town Centre, we consider it necessary to introduce a market share correction factor of 80% (i.e. we have reduced them by 20%) because, in our view, the market shares derived from the 2015 household interview survey do not provide a realistic convenience goods sales density for the town centre.

Adjustments for the other shopping destinations modelled are indicated in the equivalent RECAP Model tables, as appropriate.

These corrections to the survey-indicated market shares are our professional judgements, in the light of experience with undertaking a large number of such studies over many years. We therefore consider that the RECAP Model realistically represents the current patterns of shopping in the

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[3] This is confirmed by the now revoked DCLG 'Practice Guidance' which states, *'Also, surveys that use simple questions about where people shop, provide answers that relate to trips and not spending flows. They can also overstate the importance of the larger centres and stores, and can understate the smaller and less frequently visited stores.'* (Appendix B, paragraph B.34).
[4] Indeed, market share corrections were used for the RTCS.

Borough's shopping destinations, and provides a reliable basis for forecasting future shop floorspace capacity.

*Visitor Expenditure*

We have made allowances for visitor expenditure in the Borough's town and district centres[5] as they are likely to secure some of their convenience and/or comparison goods expenditure from outside the catchment area. These allowances are the same as those assumed for the RTCS, which we consider remain realistic.

*Existing Shop Floorspace*

The existing shop floorspace in the Borough's centres is derived from the most recent Experian Goad surveys; namely Windsor Town Centre (May 2018 – updated by RBWM in October 2019), Maidenhead Town Centre (June 2018 – updated by RBWM in October 2019), Ascot District Centre (February 2017) and Sunningdale District Centre (February 2017). In the case of Non-central stores in Borough, floorspace data has been sourced from IGD, Experian Goad and RBWM as appropriate. We have used these figures in our RECAP Model. For each shopping destination, lower and upper (including mezzanine) floors have been included.

*Committed Developments*

We are not aware of any significant retail developments currently permitted (i.e. with planning permission) in the Borough's shopping destinations.

However, there is currently some vacant retail floorspace in both Windsor and Maidenhead Town Centres. We have included a proportion of the vacant town centre retail floorspace in the RECAP Model (Tables 12 and 20 respectively) as committed development for comparison goods floorspace[6]; because it is likely that some of it will be reoccupied for retail use as the overall vitality and viability of the town centres improves over the plan period.

We have made assumptions relating to the actual proportion of vacant retail floorspace included in the Model as committed comparison goods floorspace. These assumptions are informed by the location and quality of such floorspace in Windsor and Maidenhead Town Centres (as follows).

- For Windsor Town Centre:

    o We have identified all vacant A1 shops within the existing Primary Shopping Area (totalling 1,150 sq m gross);
    o We have assumed that 50% of all vacant A1 shops comprise comparison goods floorspace, and that 40% of these will become occupied over the plan period.

- For Maidenhead Town Centre:

    o We have identified all vacant A1 shops within the existing Primary Shopping Area (totalling 3,000 sq m gross);
    o We have assumed that 50% of all vacant A1 shops comprise comparison goods floorspace, and that 30% of these will become occupied over the plan period.

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[5] We have made no such allowance for Non-central stores in Borough given that they are unlikely to secure significant expenditure from outside the catchment area.
[6] We have not assumed any committed development for convenience goods floorspace given the relevant dominance (proportionally) of comparison goods retailing within the town centres.

We have excluded all vacant retail floorspace outside the Primary Shopping Areas, as we would not expect much of that floorspace to be reoccupied for comparison goods shopping. From past experience, we would expect much of it to be occupied by other uses, such as service businesses, in due course.

Given the very limited amount of vacant retail floorspace in Ascot and Sunningdale District Centres, no such floorspace is identified as committed development in the Model.

*Growth in Sales Densities*

For comparison goods floorspace, we have assumed that both existing and new floorspace will increase its sales density by 2.5% per annum throughout the forecasting period. This allocates a substantial proportion of the forecast growth in expenditure to existing shops and stores, before new floorspace becomes necessary.

**Scenarios Assessed**

We have assessed the 'baseline' scenario (i.e. Scenario 1) for new retail development in the Borough, in which we assume that the 2015 pattern of market shares of convenience and comparison goods shopping in Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores in Borough indicated by the household interview survey (corrected as described above) remains unchanged throughout the forecasting period. The implicit assumption in this scenario is that any new retail development in these shopping destinations does not change the market shares of expenditure attracted from the catchment area.

**Format of the RECAP Model Tables**

The RECAP Model Tables for Scenario 1 are set out in Appendix B. Tables 1 to 5 set out the population and expenditure forecasts for the catchment area. Tables 6 to 13 are the Scenario 1 tables for Windsor Town Centre. Tables 6 and 7 show the pattern of market shares of expenditure on each category of convenience and comparison goods respectively attracted from the catchment area, as indicated by the household interview surveys before correction. Table 8 shows the corrected market share patterns for all convenience and comparison goods expenditure in the town centre. Table 9 shows the amounts of expenditure on each comparison goods sub-category attracted, and the amounts of all comparison goods. Table 9 is the product of Table 5 and Table 7. Table 10 sets out forecast retail sales for both convenience and comparison goods, on a zone-by-zone basis and overall. Table 11 accounts for the sales capacity of existing main food and convenience goods shops in the town centre, and Table 12 sets out the committed town centre developments and their expected sales levels (for both convenience and comparison goods). Table 13 brings together the expenditure attracted, existing floorspace and committed developments, to arrive at the retail capacity forecasts for Windsor Town Centre. It also shows the overall market shares of total catchment area expenditure on convenience and comparison goods which are shown as attracted by the town centre.

Tables 14 to 21 are the tables for Maidenhead Town Centre; Tables 22 to 29 are the tables for Ascot District Centre; and Tables 30 to 37 are the tables for Sunningdale District Centre. These tables follow the same arrangement as the tables for Windsor Town Centre.

Tables 38 to 46 are the tables for Non-central stores in Borough. These tables follow the same arrangement as the tables for the Borough's town and district centres; however an additional table is included (Table 44) indicating 'benchmark' comparison goods sales in the existing out-of-centre retail warehouses and foodstores.

# 3.    Quantitative Capacity for New Retail Floorspace

In this section, we set out and describe our updated retail capacity forecasts for the Borough's shopping destinations as at the 2019 'baseline' year and throughout the forecasting period (i.e. 2024, 2029, 2033 and 2036). Accordingly, we indicate forecast capacity in Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores in Borough.

The convenience goods forecasts are summarised in Figure 3.1 below; and the comparison goods forecasts are summarised in Figure 3.2. In setting out our forecasts, we define convenience and comparison goods as follows:

*Convenience goods: Food, alcoholic drink, tobacco products, newspapers and periodicals, nondurable household goods.*

*Comparison goods: Clothing and footwear; household textiles and soft furnishings; Furniture and floor coverings; household appliances; audio visual equipment; hardware, DIY goods, decorating supplies; chemist and medical goods, cosmetics and beauty products; books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods.*

**Convenience Goods Forecasts**

Our updated forecasts of the capacity for new convenience goods floorspace in the Borough are summarised in Figure 3.1 below. This represents the 'baseline' forecasts (i.e. no change in the 2015 survey-indicated convenience goods market shares as corrected throughout the forecasting period) for each separately modelled shopping destination, together with the overall (i.e. combined) forecast capacity for convenience goods floorspace in the Borough.

*Figure 3.1*

*Summary of Retail Capacity Forecasts: Convenience Goods - sq m net sales area*
*(Source: RBWM RECAP Model 2019)*

| Location | 2024 | 2029 | 2033 | 2036 | RECAP Model Table |
|---|---|---|---|---|---|
| Windsor Town Centre | 350 | 550 | 700 | 800 | 13 |
| Maidenhead Town Centre | -650 | -100 | 250 | 500 | 21 |
| Ascot District Centre | 50 | 150 | 200 | 200 | 29 |
| Sunningdale District Centre | 300 | 450 | 500 | 550 | 37 |
| Non-central stores in Borough | 300 | 550 | 700 | 850 | 46 |
| ***Combined Forecasts in Borough*** | **350** | **1,600** | **2,350** | **2,900** | n/a |

*Notes:*

*(a)  The forecasts are cumulative, i.e. the forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts.*
*(b)  Floorspace figures from RECAP Model rounded to the nearest 50 sq m net.*
*(c)  The sub-totals and grand totals (i.e. combined forecasts) may not exactly equal the sum of their parts, owing to rounding.*

Before we describe the convenience goods retail capacity forecasts in Figure 3.1, some additional general points should be noted.

First, the forecasts are all on the assumption that where retailers are shown by the RECAP Model to be trading above or below the level based on estimated company average levels, their sales densities will fall or rise to that company average based level. This is a conventional assumption in retail studies of this type. However, some stores may well continue to trade successfully above or below their company average sales density. The retail capacity forecasts should therefore be seen as realistic maxima, rather than targets which must be achieved through new development. By way of example; RECAP Model Table 21 shows that, we estimate, the existing convenience goods floorspace in Maidenhead Town Centre is achieving an average sales density of £9,693 per sq m net in 2019. This figure is below the combined 'benchmark' sales density of existing main food and convenience stores in Maidenhead Town Centre (£11,123 per sq m net) shown in RECAP Model Table 19, which is partly driven by the relatively high company 'benchmark' sales density of Tesco Metro formats. Our capacity forecasts for convenience goods floorspace therefore allow for sales to increase to that 'benchmark' level by 2024, before new floorspace becomes supportable by growth in expenditure. Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2024 onwards. The same approach has been applied to all other shopping destinations modelled as appropriate.

Second, the convenience goods forecasts are all on the assumption that potential new floorspace will trade at a 'generic' average sales density of £12,000 per sq m net. Whilst some foodstore formats trade above or broadly in line with this level (i.e. Sainsbury's, Asda, Tesco, Tesco Metro), other types of foodstore including some but not all discount supermarkets trade below £12,000 per sq m net. In addition, Waitrose, Marks & Spencer and Co-op trade slightly below this average sales density; the principal reason being such stores typically sell convenience goods at a lower density. Thus the format in which new convenience goods floorspace is provided will affect the amount of such floorspace which can be supported in terms of retail capacity. At this time, it is of course not possible to predict over the forecasting period the format in which potential foodstore developments might come forward. It will therefore be necessary to review the implications for retail capacity in each shopping destination when specific proposals for new stores come forward, taking account of the format of the proposed stores and their likely occupiers.

Third, we have made no allowance for increases in sales densities of convenience goods floorspace over the forecasting period. This is because convenience goods sales densities have not been rising across the board over the last few years. For some retailers they have risen but for others they have fallen. However, at the next review of the forecasts, the most up-to-date sales densities should be used, so as to take account of any changes in real terms.

Fourth, although our forecasts distinguish between town/district centres and out-of-centre shopping destinations, this is merely for forecasting convenience and reliability. It does not mean that any capacity forecast as 'non-central' should be accommodated in the form of out-of-centre development. Rather, the sequential approach should be applied, and new developments to accommodate any of the forecast need should be located in or on the edge of the town/district centres subject to identifying sufficient suitable development sites, in preference to out-of-centre locations.

Taking each of the Borough's shopping destinations modelled in turn, we describe below our updated convenience goods retail capacity forecasts (as set out in Figure 3.1).

*Windsor Town Centre*

Table 13 of the RECAP Model shows that, we estimate, the existing convenience goods floorspace in Windsor Town Centre is achieving an average sales density of £10,946 per sq m net in 2019. This figure is slightly above the combined 'benchmark' sales density of existing main food and convenience stores in the town centre (£10,188 per sq m net) shown in RECAP Model Table 11.

Our capacity forecasts for convenience goods floorspace therefore allow for sales to drop to that 'benchmark' level by 2024, before new floorspace becomes supportable by growth in expenditure. Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2024 onwards.

On this basis, Figure 3.1 shows that under Scenario 1, in which the town centre's 2015 market shares (as corrected) remain unchanged throughout the forecasting period, there will be limited capacity for additional convenience goods floorspace in Windsor Town Centre in 2024 (about 350 sq m net), before increasing to about 550 sq m net by 2029, about 700 sq m net by 2033 and about 800 sq m net by 2036; if forecast trends occur. These 'baseline' forecasts demonstrate that there is limited expenditure-based capacity to support additional convenience goods floorspace in Windsor Town Centre over the forecasting period. Any additional provision in the town centre is likely to comprise smaller foodstore formats.

*Maidenhead Town Centre*

Table 21 of the RECAP Model shows that, we estimate, the existing convenience goods floorspace in Maidenhead Town Centre is currently achieving an average sales density of £9,693 per sq m net. This figure is below the combined 'benchmark' sales density of existing main food and convenience stores in the town centre (£11,123 per sq m net) shown in RECAP Model Table 19. Our capacity forecasts for convenience goods floorspace therefore allow for sales to rise to that 'benchmark' level by 2024, before new floorspace becomes supportable by growth in expenditure. Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2024 onwards.

On this basis, Figure 3.1 shows that under Scenario 1, in which the town centre's 2015 market shares (as corrected) remain unchanged throughout the forecasting period, there will be a small theoretical over-supply of convenience goods floorspace in Maidenhead Town Centre up to 2029. Later in the forecasting period, we forecast capacity for about 250 sq m net by 2033 and about 500 sq m net by 2036; if forecast trends occur. Similar to Windsor Town Centre, we consider that any new convenience goods floorspace is likely to comprise smaller foodstore formats.

*Ascot District Centre*

Table 29 of the RECAP Model shows that, we estimate, the existing convenience goods floorspace in Ascot District Centre is achieving an average sales density of £8,351 per sq m net in 2019. This figure is slightly above the combined 'benchmark' sales density of such provision (£8,056 per sq m net) shown in RECAP Model Table 27. Our capacity forecasts for convenience goods floorspace allow for sales to drop to that 'benchmark' level by 2024, before new floorspace becomes supportable by growth in expenditure. Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2024 onwards.

On this basis, Figure 3.1 shows that under Scenario 1, in which Ascot District Centre's 2015 market shares (as corrected) remain unchanged throughout the forecasting period, there will be very limited capacity for additional convenience goods floorspace in the district centre (only about 50 sq m net by 2024 rising to about 200 sq m net by 2033 and 2036); if forecast trends occur.

*Sunningdale District Centre*

Table 37 of the RECAP Model (Scenario 1) shows that, we estimate, the existing convenience goods floorspace in Sunningdale District Centre is currently achieving an average sales density of £11,771 per sq m net; above the combined 'benchmark' sales density of such provision (£9,948 per sq m net) shown in RECAP Model Table 35. Our capacity forecasts for convenience goods floorspace allow for sales to drop to that 'benchmark' level by 2024, before new floorspace becomes supportable by growth in expenditure. Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2024 onwards.

On this basis, Figure 3.1 shows that under Scenario 1, in which Sunningdale District Centre's 2015 market shares (as corrected) remain unchanged throughout the forecasting period, there will be modest capacity for additional convenience goods floorspace in the district centre (about 300 sq m net by 2024 and rising to about 550 sq m net by 2036); if forecast trends occur.

*Non-central stores in Borough*

Table 46 of the RECAP Model (Scenario 1) shows that, we estimate, the existing convenience goods floorspace in Non-central stores in Borough is achieving an average sales density of £10,608 per sq m net in 2019. This figure is very slightly higher than the combined 'benchmark' sales density of existing main food and convenience stores in these out-of-centre locations (£10,274 per sq m net) shown in RECAP Model Table 43.

Our capacity forecasts for convenience goods floorspace allow for sales to drop to the combined 'benchmark' level by 2024, before new floorspace becomes supportable by growth in expenditure. Any forecast capacity thus takes into account the likely over-trading of some existing provision in out-of-centre locations (most likely the Windsor Tesco on Dedworth Road). Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2024 onwards.

On this basis, Figure 3.1 shows that under Scenario 1 for Non-central stores in Borough, in which the 2015 market shares (as corrected) remain unchanged throughout the forecasting period, there will be limited capacity for additional convenience goods floorspace in 2024 (about 300 sq m net), increasing to about 550 sq m net by 2029, about 700 sq m net by 2033 and about 850 sq m net by 2036; if forecast trends occur.

As described above, these capacity figures should be accommodated in the Borough's town centres if at all possible, or on the edge of these centres, in a retail format appropriate to such a location (in accordance with the sequential approach). Alternatively, it may be appropriate for the Borough's district centres to support some of this forecast growth in convenience goods floorspace

**Comparison Goods Forecasts**

Our updated forecasts of the capacity for new comparison goods floorspace in the Borough are summarised in Figure 3.2 below. This represents the 'baseline' forecasts (i.e. no change in the 2015 survey-indicated comparison goods market shares as corrected throughout the forecasting period) for each separately modelled shopping destination, together with the overall (i.e. combined) forecast capacity for comparison goods floorspace in the Borough.

As with convenience goods, the capacity for additional out-of-centre comparison goods floorspace has been distinguished in the RECAP Model for that in town/district centres merely for forecasting convenience and reliability. It does not mean that forecast capacity should be accommodated in the format of relatively low sales density out-of-centre retail warehouses. New floorspace should be located in accordance with the sequential approach, rather than as out-of-centre retail warehouses, wherever possible.

We have assumed that new floorspace forecast for Non-central stores in Borough would trade at typical average sales densities for (non-food) retail warehouses. However, in the event that the forecast capacity or any part of it can be accommodated in town centre, or edge-of-centre, format developments, the capacity would probably be less that forecast in Figure 3.2 below; because town centre format retail floorspace typically trades at higher sales densities than retail warehouses. The summary figures (i.e. combined forecasts) in the bottom row of Figure 3.2 reflect this, and assume that all new comparison goods floorspace would trade at town centre format sales densities.

*Figure 3.2*

*Summary of Retail Capacity Forecasts: Comparison Goods - sq m net sales area*
*(Source: RBWM RECAP Model 2019)*

| Location | 2024 | 2029 | 2033 | 2036 | RECAP Model Table |
|---|---|---|---|---|---|
| Windsor Town Centre | 300 | 1,700 | 2,050 | 2,250 | 13 |
| Maidenhead Town Centre | -50 | 900 | 1,150 | 1,200 | 21 |
| Ascot District Centre | 50 | 100 | 150 | 150 | 29 |
| Sunningdale District Centre | 50 | 100 | 150 | 150 | 37 |
| Non-central stores in Borough | -1,450 | -1,250 | -1,200 | -1,150 | 46 |
| ***Combined Forecasts in Borough*** | **-650** | **1,950** | **2,700** | **3,000** | n/a |

*Notes:*

(a) *The forecasts are cumulative, i.e. the forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts.*
(b) *Floorspace figures from RECAP Model rounded to the nearest 50 sq m net.*
(c) *The sub-totals and grand totals (i.e. combined forecasts) may not exactly equal the sum of their parts, owing to rounding.*
(d) *The individual forecasts do not sum to the combined forecasts due to the assumption that none of the new floorspace would be provided at the relatively low sales densities for retail warehouses (as previously explained).*

Taking each of the Borough's shopping destinations modelled in turn, we describe below our updated comparison goods retail capacity forecasts (as set out in Figure 3.2).

*Windsor Town Centre*

Table 13 of the RECAP Model shows that, we estimate, the existing comparison goods floorspace in Windsor Town Centre is currently achieving an average sales density of £7,026 per sq m net. This is a relatively high sales density but realistic, we consider, for a town centre of this size and bearing in mind the catchment it serves.

In order to allow a substantial proportion of the growth in expenditure to support existing shops, we have assumed that the sales density of the existing town centre floorspace will grow at 2.5% per annum from 2019 onwards. This allocates about 60% of the growth in expenditure to existing shops and about 40% to new floorspace. This estimated growth in sales is based on our professional judgement, and assumes that the existing town centre floorspace will become more efficient (by 2.5% per annum) from 2019 onwards. Such efficiencies are more likely to be achieved within the town centre's larger and modern shops (i.e. King Edward Court) as opposed to smaller, less flexible formats in the secondary/tertiary shopping areas.

On this basis, Figure 3.2 shows that under Scenario 1, in which the town centre's 2015 market shares (as corrected) remain unchanged throughout the forecasting period, there will be capacity for about 300 sq m net of new comparison goods floorspace in the town centre in 2024, rising to about 1,700 sq m net by 2029, about 2,100 sq m net by 2033 and about 2,250 sq m net by 2036; if forecast trends occur.

*Maidenhead Town Centre*

Table 21 of the RECAP Model shows that, we estimate, the existing comparison goods floorspace in Maidenhead Town Centre is achieving an average sales density of £4,374 per sq m net in 2019. This is a realistic sales density for a town centre of this size and type, and below the average sales density achieved in Windsor Town Centre (primarily reflecting the nature and quality of the retail offer).

Our capacity forecasts allow for 2.5% per annum growth in the sales density of the existing town centre comparison goods floorspace from 2019 onwards; consistent with that for Windsor Town Centre (as described above).

Figure 3.2 shows that under Scenario 1 with no changes in 2015 market shares (as corrected), there will be a theoretical over-supply of comparison goods floorspace in 2024. There is limited capacity for additional such floorspace by 2029 (about 900 sq m net), before rising to about 1,150 sq m net by 2033 and about 1,200 sq m net by 2036; if forecast trends occur.

*Ascot District Centre*

As indicated in RECAP Model Table 29, we estimate that the existing comparison goods floorspace in Ascot District Centre is currently achieving an average sales density of £3,981 per sq m net. Figure 3.2 above shows that, with no changes in 2015 market shares (as corrected), there will be very limited capacity for additional comparison goods floorspace over the forecasting period (by 2036 we forecast capacity for about 150 sq m net); if forecast trends occur. Our capacity forecasts allow for 2.5% per annum growth in the sales density of the existing comparison goods floorspace from 2019 onwards.

*Sunningdale District Centre*

As indicated in RECAP Model Table 37, we estimate that the existing comparison goods floorspace in Sunningdale District Centre is achieving an average sales density of £3,876 per sq m net in 2019. Similar to Ascot District Centre, Figure 3.2 above shows that there will be very limited capacity for additional comparison goods floorspace in Sunningdale District Centre over the forecasting period (by 2036 we forecast capacity for about 150 sq m net); if forecast trends occur. Our capacity forecasts allow for 2.5% per annum growth in the sales density of the existing comparison goods floorspace from 2019 onwards.

*Non-central stores in Borough*

We estimate that existing out-of-centre retail warehouses, plus the Windsor Tesco on Dedworth Road, are currently achieving a combined comparison goods sales density of £3,449 per sq m net (RECAP Model Table 44). This sales density is substantially lower than Windsor and Maidenhead Town Centres, because the Non-central stores in Borough modelled comprise retail warehouses including Homebase, Carpetright, Halfords and Pets at Home; which typically achieve a lower sales density than town centre retail floorspace. Our capacity forecasts allow for 2.5% per annum growth in the sales density of the existing comparison goods floorspace at Non-central stores in Borough from 2019 onwards (consistent with that for the Borough's town/district centres).

Figure 3.2 shows that, with no changes in 2015 market shares (as corrected) throughout the forecasting period, there will be no capacity for additional comparison goods floorspace at Non-central stores in Borough. Should any proposals for such floorspace come forward, they should be directed towards town centres (if appropriate) in accordance with the sequential approach of the NPPF.

**Use and Review of the Forecasts**

We must emphasise that all expenditure-based forecasts of future shop floorspace capacity are based on imperfect data and contain a number of assumptions. Our forecasts set out in this Update study are based on the most up-to-date and reliable information currently available to us. However, they are intended as an indication of the likely order of magnitude of future shop floorspace capacity (if forecast trends are realised) rather than as growth targets or rigid limits to future growth. The forecasts should be periodically revised as necessary (as advised above) in the light of actual population and expenditure growth and, of course, as the effect of changes in the retail sector become more measurable.

# 4. Review of Potential Development Opportunities

The 2012 NPPF requires local planning authorities to allocate sites to accommodate identified retail needs *in full* (paragraph 23, sixth bullet) [7].

Having identified the capacity for additional retail floorspace in section 3, we set out below our commercial review of potential development opportunities. As instructed by RBWM, our assessment is focused on Maidenhead Town Centre sites. Our high level assessment considers the suitability of each site for retail and mixed use development, and of what type and scale.

For the avoidance of doubt, our commentary on each site does not predetermine any particular form of development; this will be a matter for RBWM (based on the provisions of the development plan and other material considerations) should proposals come forward. Further, our assessment is not informed by detailed feasibility studies to better understand the development potential of a site and its constraints; or financial appraisals to test the viability of a development. It is, however, an appropriate basis on which to support the retail and town centre policies (and allocations) of the emerging Borough Local Plan.

Figure 4.1 below provides a list of potential development opportunities identified by RBWM.

*Figure 4.1*

*Potential Development Opportunities in the Borough*

|  | Sites |
|---|---|
| Maidenhead Town Centre | AL1: Nicholsons Centre<br>AL2: Land between High Street and West Street<br>AL3: St Mary's Walk<br>AL4: York Road<br>AL5: West Street<br>AL6: Methodist Church, High Street<br>AL7: Maidenhead Railway Station<br>AL9: Saint-Cloud Way<br>AL10: Stafferton Way Retail Park |

We assess below the development potential of each of these sites for retail and mixed use development. Those comprising an element of retail, if delivered, would help to meet the retail needs (i.e. capacity) identified in section 3. Of course, other sites may come forward for new retail development in and on the edge of the Borough's centres; and the new Borough Local Plan should be sufficiently flexible to support and respond to such proposals that comply with the sequential approach set out in the NPPF.

**AL1: Nicholsons Centre**

This indoor shopping centre is located within the primary shopping area and has a range of major and multiple retailers. However, it comprises a number of vacancies (particularly at its eastern end). The site is bound by High Street to the north and the centre's multi-storey car park (3 storeys) to the south, therefore limiting the scope for more intensive development.

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[7] Paragraph 85 (d) of the 2019 NPPF requires planning policies to *allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead.*

That said, given its location in the heart of the town centre with good connectivity to Maidenhead railway station, we consider this site represents a prime opportunity for substantial improvement or redevelopment.

Suitable proposals for the centre would include a mix of uses including ground floor retail, leisure (including food & beverage) and community space, with ground floor and upper floor residential uses. There is also scope for office uses (subject to demand). Notwithstanding the existing level of vacancies within the centre, we consider that any scheme is unlikely to result in a substantial net increase of A1 retail floorspace (given the structural changes in the retail sector and the growing significance of non-A1 uses in supporting the vitality and viability of town centres). The improvement or redevelopment of the centre would, however, generate notable qualitative benefits; such as attracting new occupiers, enhancing the consumer experience, and improving the town centre as a place to live and work.

The draft Maidenhead Town Centre Placemaking Study identifies the site as part of the High Street Quarter. It states that High Street currently fulfils a number of functions, and new developments (or improvements) along this route should strengthen its character and function.

## AL2: Land between High Street and West Street

The site lies within the primary shopping area on the northern side of High Street (the draft Maidenhead Town Centre Placemaking Study identifies the site as part of the High Street Quarter). It is bound by West Street to the north and comprises in the region of 25 shop units.

A comprehensive redevelopment scheme would be desirable given its prominent location within the town centre and the scope of delivering effective placemaking (although the complexity of land ownerships is unknown and may prove challenging). Any proposals should include active ground floor frontages to help address the decline of the High Street frontage, which has seen a shift towards non-A1 retail uses and an increasing number of vacancies (especially at its western end). As such, ground floor uses should include retail, leisure and/or community uses. There may also be scope for ground floor office/workshop space, with residential (or office) uses above.

## AL3: St Mary's Walk

The site is located approximately 50 metres to the east of the town's primary shopping area. Extending north from High Street, it backs onto the rear of Sainsbury's and is bound by Providence Place, St Mary's Church and office premises. The site can be accessed via an underpass off the eastern end of High Street and has a poor pedestrian environment. To that end, any redevelopment proposals should enhance connections with the wider town centre – and High Street and Providence Place in particular.

The site is unlikely to support a substantial quantum of retail uses; however, any such uses should be focused to the south fronting High Street. Other potential uses include community, office and/or residential uses. A residential-led scheme would revitalise this part of the town centre and generate additional footfall to support shops and other businesses.

**AL4: York Road**

The site is situated to the southeast of the town centre, outside the primary shopping area. It is surrounded by a number of land uses including a football club, church, library and car park. The draft Maidenhead Town Centre Placemaking Study identifies the area as primarily a residential area with good connectivity and integration with the wider town centre. We note that parts of the site fall with flood zones 3b (0.18ha), 3a (0.37ha) and 2 (1.06ha).

Given the site's location (relative to the primary shopping area) and nature of the surrounding land use, we do not consider the York Road site to be suitable for substantial retail development. We consider a residential-led scheme with elements of office space or small scale retail, community and/or cultural uses at ground floor level to be more appropriate.

This is supported by the draft Maidenhead Town Centre Placemaking Study, which identifies the site for 320 residential units. The draft Study further identifies York Road as a 'destination' civic and cultural quarter, and suggests that a new and larger Heritage Centre could make a significant contribution to this quarter. This would serve to create a distinguished attraction for the town centre and have a positive impact on its general prosperity.

**AL5: West Street**

The site is located north of the primary shopping area. It is bound by West Street to the south and the A308 ring road to the north, beyond which lies Kidwells Park. Given its separation from the primary shopping area (the shop units fronting High Street turn their back on the site), and without better connections potentially realised through the comprehensive redevelopment of Site AL2, the site is unlikely to be commercially viable for retail uses in our view.

However, we consider that the site is suitable for a residential-led mixed use scheme, potentially including small scale community and/or office uses at ground floor level. The draft Maidenhead Town Centre Placemaking Study identifies the site for 240 residential units, and it is noted that the existing community uses should be retained or re-provided as part of any redevelopment scheme.

**AL6: Methodist Church, High Street**

This prominent 'island' site is bound by Frascati Way, Kings Street and Nicholsons Lane. It is situated to the immediate west of the primary shopping area (albeit the existing ground floor shops form part of the secondary shopping frontage). The site is identified in the draft Maidenhead Town Centre Placemaking Study as part of the High Street Quarter.

Given the site's gateway location on the western edge of the town centre, we consider it is a prime opportunity for comprehensive redevelopment. Suitable ground floor uses would include retail (e.g. small scale convenience store), leisure and/or community uses; with residential uses at the upper levels. The redevelopment and improvement of this key site would contribute towards the vitality and viability of the town centre, and potentially increase activity and unit take-up at the western end of High Street.

**AL7: Maidenhead Railway Station**

The site comprises the area around Maidenhead railway station. It is identified in the draft Maidenhead Town Centre Placemaking Study as within the Fringe, an area which is not subject to the same development pressures as the Core Town Centre area. We understand the placemaking strategy is to promote a series of small improvements which, cumulatively, improve the sustainability of the Fringe area by improving legibility and realising opportunities to better integrate with the town centre. Maidenhead Railway Station is identified as having a specific role in overcoming the barrier of the A308 ring road at the southwest corner of the town centre.

The site is also identified in the draft Study as part of the Railway Quarter – this area should seek to capitalise on opportunities for a good 'first impression' to visitors and other town centre users.

We consider that there would be scope for small scale retail space associated with investment in and around the railway station. The demand for retail space in this location, in our view, is likely to be predominately station driven; namely station-type retail uses such as 'grab and go' food and retail services. Furthermore, the scale and nature of retail space at the site should be controlled so as not to undermine the vitality and viability of the town's primary shopping area and/or detract from retail development and investment opportunities therein.

Given the location, in our opinion, a residential-led mixed use development with elements of office space and food & beverage uses would be appropriate. We note that the draft Study sets a provision for 150 residential units.

**AL9: Saint-Cloud Way**

The site is located to the north of the town centre, beyond Saint-Cloud Way and Sainsbury's. It currently accommodates the Magnet Leisure Centre and to that end, the draft Maidenhead Town Centre Placemaking Study states that additional community facilities should be provided in the Saint-Cloud Way area as part of any proposals.

The site is somewhat detached from the primary shopping area and railway station. Thus, we do not consider this site to be suitable for substantial retail development. Any such uses are likely to be small scale and come forward as part of a residential-led mixed use scheme (the draft Placemaking Study identifies the site for 600 residential units). The site also represents a good location for additional or replacement community facilities.

Any proposals should include effective placemaking and improve links between the site and the town centre.

**AL10: Stafferton Way Retail Park**

The site is situated off Stafferton Way, to the south of the town centre and behind the railway line. Surrounding land uses include office and warehousing facilities. Given the site is located within the town centre fringe, we do not consider it appropriate for more intensive retail development (albeit we would question the demand for such development). If further retail development was to come forward on this site, it would potentially attract retailers that would otherwise be accommodated within the town centre,

thereby to the detriment of achieving higher priority retail development in accordance with the 'town centre first' approach of the NPPF.

We consider that a mixed use development comprising residential and/or office uses would be appropriate; potentially with retained or new, small scale retail uses at ground floor level.

# 5.    Shopping Frontage Designations

Paragraph 23 (third bullet) of the 2012 NPPF requires local planning authorities to *define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres[8]*.

As instructed by RBWM, we have reviewed the primary and secondary frontages (and thus primary shopping areas) in the Borough's town/district centres as set out in the RTCS. Our review has been informed by the latest Experian Goad surveys and our own site inspections of each centre considering levels of retail occupancy/vacancy, key attractors and pedestrian flows.

Appendix C includes our recommended retail frontage designations for each of the Borough's centres.

The frontage designations and supporting analysis set out in the RTCS remain broadly valid. However, in the light of our recent site inspections of Windsor and Maidenhead Town Centres, we recommend the amendments identified in Figure 5.1 below and shown on the relevant plan at Appendix C. These amendments relate to the extent of the primary and secondary frontages; no amendments are recommended in respect of the primary shopping areas.

In the case of Ascot and Sunningdale District Centres, we consider that no amendments are necessary.

*Figure 5.1*

*Amendments to RTCS Shopping Frontage Designations*

| Windsor Town Centre | | |
|---|---|---|
| **Frontage address** | **Frontage amendment** | **Justification** |
| Units 29-67 Windsor Royal Station | From primary to secondary frontage | The current mix of A1 and non-A1 uses, particularly A3/A4. The proximity of the frontage to the railway station provides a good opportunity for services and leisure-orientated uses to enhance dwell time. |
| **Maidenhead Town Centre** | | |
| **Frontage address** | **Frontage amendment** | **Justification** |
| Coppa Club, The Picturehouse, Bridge Avenue | From non-designated to secondary frontage | New ground floor food & beverage use. Appropriate for secondary frontage outside the primary shopping area. |
| Units 69-81 Queens Walk, Nicholsons Centre | From primary to secondary frontage | Existing vacant shop units and relatively low pedestrian footfall (compared to the central 'quad' of the centre). A greater diversity of non-A1 uses would help to sustain this frontage and the wider centre. |
| Units along Broadway Mall (southern end), Nicholsons Centre | From primary to secondary frontage | Site inspections confirmed that this route comprises blank ('side of shop') frontages and is principally a thoroughfare to/from the centre's multi-storey car park and public toilets. |

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[8] Paragraph 85 (b) of the 2019 NPPF requires planning policies to *define the extent of town centres and primary shopping areas* with the latter based on, as set out in Annex 2, *where retail development is concentrated.*

| Units 94-114 High Street | From primary to secondary frontage | Since our previous analysis the frontage has experienced a shift towards non-A1 uses and higher vacancies. This is reflected by levels of pedestrian footfall. The frontage would benefit from greater flexibility for changes of use. |
| --- | --- | --- |

# 6.    Summary & Recommendations

Cushman & Wakefield was instructed by RBWM in September 2019 to undertake a partial Update of the RTCS completed in 2015.

The Update study is required to provide up-to-date evidence for the new Borough Local Plan and takes into account the events and other material considerations since 2015.

It specifically sets out:

- o   New and up-to-date retail capacity forecasts for the Borough (for both convenience and comparison goods) over the plan period;
- o   A high level assessment of potential development sites for retail and mixed use development; and
- o   A review of shopping frontage designations in the Borough's centres.

Our study is based (insofar as possible) on the most robust and reliable data available. However, it does not provide a full and comprehensive review of the RTCS. For example, it does not include up-to-date 'healthcheck' assessments of the Borough's centres; and it draws on the results of the 2015 household interview survey of shopping patterns as used to inform the RTCS.

The updated retail capacity forecasts identify limited expenditure-based capacity for future shop floorspace in the Borough, as highlighted below.

### *Convenience Goods Forecasts*

*(sq m net sales area)*

| Location | 2024 | 2029 | 2033 | 2036 | RECAP Model Table |
|---|---|---|---|---|---|
| Windsor Town Centre | 350 | 550 | 700 | 800 | 13 |
| Maidenhead Town Centre | -650 | -100 | 250 | 500 | 21 |
| Ascot District Centre | 50 | 150 | 200 | 200 | 29 |
| Sunningdale District Centre | 300 | 450 | 500 | 550 | 37 |
| Non-central stores in Borough | 300 | 550 | 700 | 850 | 46 |
| *Combined Forecasts in Borough* | **350** | **1,600** | **2,350** | **2,900** | n/a |

*Comparison Goods Forecasts*

*(sq m net sales area: the individual forecasts do not sum to the combined forecasts due to the assumption that none of the new floorspace would be provided at the relatively low sales densities for retail warehouses)*

| Location | 2024 | 2029 | 2033 | 2036 | RECAP Model Table |
|---|---|---|---|---|---|
| Windsor Town Centre | 300 | 1,700 | 2,050 | 2,250 | 13 |
| Maidenhead Town Centre | -50 | 900 | 1,150 | 1,200 | 21 |
| Ascot District Centre | 50 | 100 | 150 | 150 | 29 |
| Sunningdale District Centre | 50 | 100 | 150 | 150 | 37 |
| Non-central stores in Borough | -1,450 | -1,250 | -1,200 | -1,150 | 46 |
| *Combined Forecasts in Borough* | **-650** | **1,950** | **2,700** | **3,000** | n/a |

Finally, it is important to restate that retail capacity forecasts beyond five years should be treated with caution, as they are based on various assumptions and forecasts with regard to the trading performance of the Borough's shopping destinations, the growth in population and retail expenditure, constant market shares, etc. Thus the forecasts for 2024 are more robust than those for 2029; while we suggest that the forecasts for 2033 and 2036 are treated with a significant degree of caution.