THE RETAIL GROUP

informed solutions

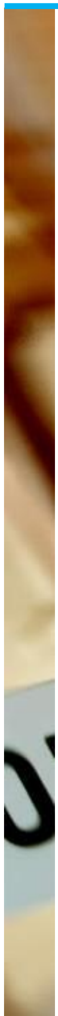
Retail Needs and Opportunities in Hertford Town Centre

Study Report for Tibbalds Planning and Urban Design Ltd

The Retail Group
August 2015

Report Contents

1.0 Background



1.1 The Retail Group Experience

The Retail Group is a specialist retail management consultancy that provides informed solutions about the consumers' future needs for a wide range of retail and property clients. The philosophy of our business is "to improve our clients' business through our understanding of shoppers, their shopping habits, retailers and the skills of retailing".

For retail property clients and Local Authorities, we offer objective and carefully researched retail strategies based on detailed awareness and analysis of national and local retail markets. We ensure that proposed developments target and satisfy the future needs and aspirations of all local consumers. Our clients appreciate the down-to-earth approach to researching individual centres and our ability to clearly state the reasons for trading in a particular location. Our retail strategies encompass all town centre operators including multiple retailers, independents, service, catering and leisure operators.

We have defined future town centre strategies for over 150 locations covering all sizes and types, from market towns like Morpeth and Frome, to sub-regional towns like Ashford and Livingston, to regional destinations such as Birmingham and Bluewater. Our consumer oriented methodology and approach also enables us to work on iconic locations like Wembley, Greenwich Peninsula and Spitalfields.

Towns we have worked in with an historic setting include: Oxford, Malmesbury, Winchester, Malton, Kettering, Canterbury, Exeter and Windsor.

1.2 Project Background and Approach

The Retail Group is part of the Tibbalds project team, whom have been tasked with preparing a vision and strategy for Hertford Town Centre.

The Retail Group's specific role is to identify how to make Hertford more appealing as a place to trade as well as shop. In particular, The Retail Group has been tasked with identifying what is good and not so good about Hertford's retail offer, as well as opportunities to improve it. Also, to identify what is missing from Herford's retail offer that is preventing it from growing and achieving it's considerable retail potential. To do so, three areas of research have been undertaken:

- An objective review of Hertford's retail offer from the perspective of the consumer
- An independent survey of retail operators in the town centre
- A review of existing retail research and information; specifically in terms of factors indicating potential or growth opportunities

This report details the findings and conclusions of our research.

2.0 Project Objectives

The Retail Group's project objectives are:

- Identify how Hertford is currently trading in terms of retail performance
- Identify what is holding back Hertford from realising its retail potential
- Identify the components needed to improve Hertford as a place to shop and trade
- Identify gaps in the offers, including suitable target operators
- Identify whether Hertford would benefit from having a Business Improvement District
- Make recommendations for improving the ongoing management of the town centre, including whether a town centre role should be reinstated, or indeed other management options

3.0 Retail Review

An objective review of the town centre has been undertaken, focussing on the width and depth of the offer, as well as overall shopping experiences from a shopper's perspective.

The plan opposite shows the area included as part of the review; and how it has been broken down into sub-zones for ease of reference.

Zone 1: Bircherley Green Shopping Centre

Zone 2: Railway Street

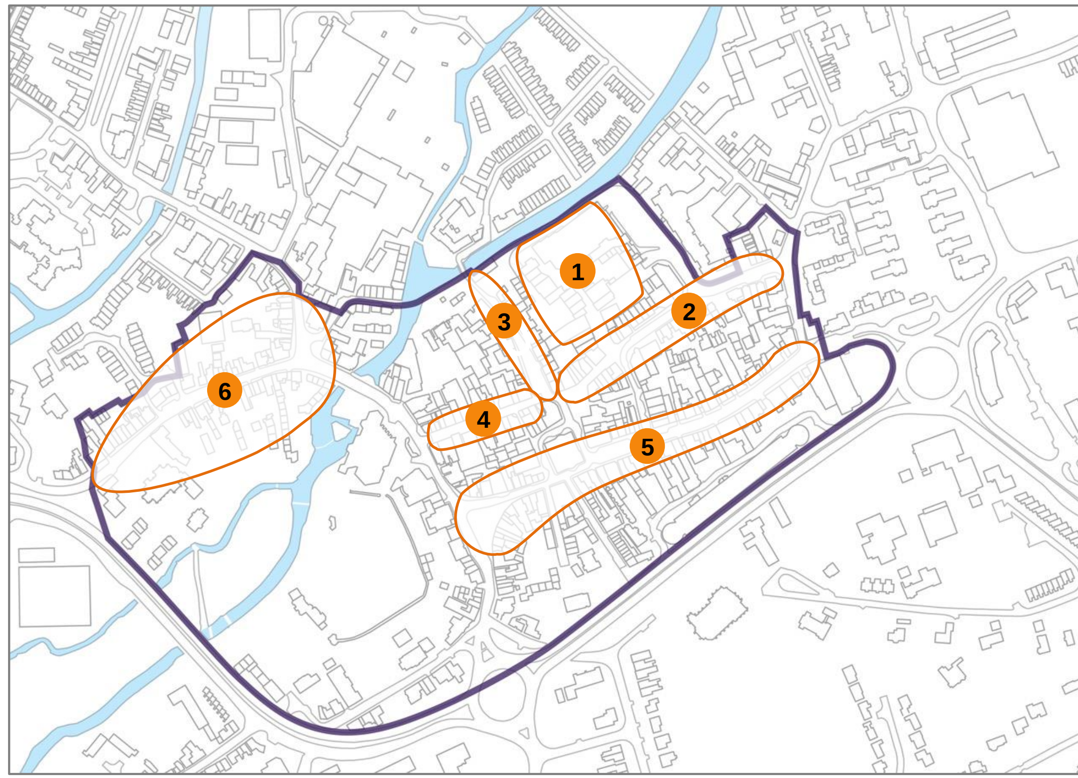
Zone 3: Bull Plain

Zone 4: Maidenhead Street

Zone 5: Fore Street

Zone 6: St. Andrew Street / Old Cross

Hertford Town Centre Retail Sub-Zones



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3.0 Retail Review

Zone 1: Bircherley Green Shopping Centre

The Bircherley Green Shopping Centre in effect anchors Hertford Town Centre. It contains most of Hertford's recognisable retail multiples, including the main town centre food store. The Waitrose store is however limited in size and facilities and provides a top up / basket convenience store offer. In it's current form, it is too small to be an effective supermarket and is in effect a very large convenience store.

Other *anchors* within the scheme include Boots, WHSmith, New Look and Superdrug; all trading in small units and offering limited / basic core product ranges. Holland and Barratt is perhaps the retailer trading in what could be referred to as an average or even perhaps larger than average store.

The anchors are nominally so because of their fascia / reputation / normal role in a town centre. Their actual offers in Hertford are underwhelming.

3.0 Retail Review

Zone 1: Bircherley Green Shopping Centre (cont.)

The centre has a strong service goods offer (nails, mobile phone repair, hairdressers, barbers, key cutting etc.) and the catering offer appears well used and popular too.

Despite occupying a prime riverside location, the centre currently has it's back to the river and is some way short of maximising it's potential integration with the river in terms of riverside vistas, dining / external seating / tables and chairs.

Overall, the centre provides a role in anchoring the town centre.

However, unit sizes are small, facilities are basic, the retail environment forgettable. In many cases, retail fascias are being dominated by the poor design of the scheme.

In addition the centre is insufficiently integrated with the rest of the town centre.

3.0 Retail Review

Zone 2: Railway Street

Railway Street provides the main east-west route across the town centre. It is pedestrianised in the centre at the intersection with Salisbury Square, but very traffic-dominated outside the units at the front of Bircherley Green.

The retail mix in this zone is dominated by service and catering operators. Whilst the streetscape is quite pleasant, many of the shops have limited impact due to the overhang from residential units above. Halfords is quite noticeable, but again trading in a small unit, even for one of their 'metro' formats.

The link to the rest of the town centre offer via Salisbury Square is quite congested as a result of the plethora of 'A' boards in use, as well as the market stalls blocking sightlines up and down the street. This is also compounded by delivery vehicles blocking the road. As a general comment the weekday market does not match the quality aspirations of the retail offer, especially the service goods offer.

3.0 Retail Review

Zone 2: Railway Street (cont.)

Two attractive appealing and independent catering traders trade in this central section of Railway Street. However many of the other units are basic / mass catering.

So overall, whilst Railway Street provides a relatively pleasant open streetscape and shopping environment, given its high profile location and key role as a pedestrian access route, it could be and should be much better.

The 'central' area of Railway Street has a crucial role to perform in linking the various components of the town centre retail offer together. At the moment it is not fulfilling that role effectively enough. If anything, it is currently a barrier to footfall distribution and routing.

3.0 Retail Review

Zone 3: Bull Plain

Bull Plain presents a very attractive streetscape linking the core town centre offer and the River Lee.

The offer is distinctly focussed around the service goods sector, including a travel agent, nail bar, hairdressers and diving supplies. An upmarket bridal and wedding supplies shop can be found in the middle of the street near the Hertford Museum.

At the end of Bull Plain, there is a small bridge link which links into the new J Sainsbury Supermarket on Hartham Lane. Whilst most consumers would appear to be using this large and effective store as a drive to destination and a stand alone food shop, there is an evident footfall ‘ant track’ of consumers walking to / from the store to the town centre.

3.0 Retail Review

Zone 4: Maidenhead Street

Maidenhead Street provides a very important access route into the core town centre retail area. Despite this, the street does appear to be the retail backwater of the town centre.

Many retailers here are not taking sufficient care of their external shop fronts, with bags of rubbish commonplace and indeed apparent trading from pallets outside.

Again, there is a proliferation of various types of ‘A’ boards, all of which add to the visual clutter of the street. It’s not unusual to find cars parked on the street during core retail trading hours, despite the street being pedestrianised during the day.

The offer is visually dominated by Poundstretcher and a couple of jewellers. There are a number of charity shops on the street, along with other service retailers such as a bookmaker, Boots Opticians, Co-op and a pharmacy.

Despite it’s potential importance in terms of access to the town centre, Maidenhead Street presents an underwhelming retail experience and offer.

3.0 Retail Review

Zone 5: Fore Street

The Fore Street retail offer starts at Parliament Square and would appear to be the heart of the town's evening economy; in this section there are 4 bars, 2 restaurants and 2 takeaways. The seating outside Café Rouge appears popular and well used throughout the day too. A quality men's fashion independent and trendy Barber shop completes this male focussed offer.

As we move further east, there is more evidence of an F&B quarter with attractive contemporary Indian and Chinese restaurants, Italian deli, historic pub / hotel and presumably a long standing home furnishing shop. These units are reasonably large, well looked after and attractive from the outside.

A number of the F&B operators are targeting the mid / up market consumer.

3.0 Retail Review

Zone 5: Fore Street (cont.)

Fore Street also offers several estate agents, a florist, beautician, hairdresser, post office, 3 banks / building societies, picture framers, independent electronic shop, print shop and travel shop.

There is an appealing M&S Simply Food store at the eastern edge of Fore Street. This small store (circa 5,000 sqft.) is in great condition, is easy to see and easy to access. There are 18 short stay free car parking spaces immediately outside the store. Overall a strong, effective and well located convenience store on the edge of Hertford Town Centre.

In summary, whilst Fore Street is not a destination retail location, it does have a strong catering / restaurant offer, wide ranging service goods offer and strong convenience store.

It presents an attractive retail environment and is an appealing place to visit.

3.0 Retail Review

Zone 6: St. Andrew Street / Old Cross

The final piece of the Hertford Town Centre retail jigsaw is the St. Andrew Street / Old Cross retail offer. Whilst it is visible from the core town centre offer, this offer is physically disconnected and not signposted.

Both of these roads are traffic heavy and cars queuing at the lights where they join Mill Bridge are a common occurrence.

Despite this, the environment and streetscape are attractive, appealing and memorable. Like much of Hertford Town Centre, Old Cross contains a mix dominated by service retailers including an optician, 3 hairdressers / barber, florist as well as one bar / restaurant.

St. Andrew Street contains the strongest and certainly most consistently high quality mix of independent retailers in Hertford town centre. The mix contains 2 ladies wear boutiques, a bridal shop, upmarket children's clothes, 2 hairdressers, 2 beauticians / day spa, 2 drycleaners and barbers. The catering / food offer is strong, with 2 restaurants, 2 pubs / bars and a deli.

Finally, and uniquely to Hertford, the offer contains a home focussed collection of specialist retailers, including 2 antiques dealers, an Aga showroom, floor specialist, curtain makers / upholsterers and even fine art auctioneers.

So to summarise, the offer on St. Andrew Street / Old Cross is probably the best collection of independent operators in Hertford. However, it is disconnected and feels remote from the core town centre offer

3.0 Retail Review

Summary

Many of the streets and shop units in the Hertford Town Centre are attractive and appealing, especially so on Fore Street and St Andrew Street. Unfortunately the town has an under performing and underwhelming retail offer. Its line up of multiple retailers is limited both in quantum and provision. The four core retail anchors trade from small and basic stores, in low impact locations.

The Bircherley Green shopping centre is limited in size, has basic facilities (including parking provision) and is not doing justice to its riverside location. Furthermore its design and particularly its many *overhangs* are limiting the visibility of the retail offer.

The offer overall is dominated by service retail and catering / F&B. The evening catering offer is reasonably good in terms of quantum and quality however the day time offer is mass market and fast food focused.

There are some strong independent retailers on St Andrew Street, however they are physically disconnected from the core town centre offer.

The weekday street trading offer is basic and not performing its role of helping to distribute consumers across the town centre. Anecdotally however it is understood that the monthly farmers market is successful and well adopted by consumers

The town centre needs more bigger stores, stronger anchors, more fashion stores, more multiple stores, more pavement dining, a stronger retail heart and better routing across the town.

The town is a nice place to visit. Its clearly used by a social customer base, yet the core retail offer does not match the quality and positioning of the F&B offer.

So many strengths to build on, but unfortunately some pretty serious weaknesses to overcome too!

4.0 Retail Operators Survey

4.1 Introduction

The Retail Group undertook a survey of retail operators across Hertford Town Centre during April 2015. The aim of the survey was to capture the trading experience of operators on the ground, including shopping patterns, year on year trading patterns, improvement and physical changes wanted.

Operators targeted included all forms of retail, i.e. convenience, comparison, service, catering and F&B.

Operators were assured of individual confidentiality. A number of questions were multi-choice, hence answers may not always add up to 100%.

The survey methodology adopted uses a direct distribution approach, whereby retailers in the town centre are asked to complete a short, pre-prepared survey. Surveys are handed directly to the store managers for completion and collected later that same day.

The information from the surveys is analysed collectively, individual retailer responses are kept confidential.

60 completed surveys were obtained, across a broad cross-section of retailers.

The majority of respondents are established retailers in Hertford Town Centre, 52% having traded there for over 10 years; conversely there are few new retailers.

4.2 Customer Profile and Numbers

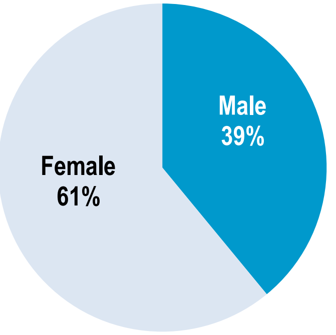
Respondents surveyed consider that Hertford's customer profile has a slight bias towards female shoppers.

The age profile of shoppers is dominated by two age groups; 25-44 year olds and 45-64 year olds. Typically consumers are of working age.

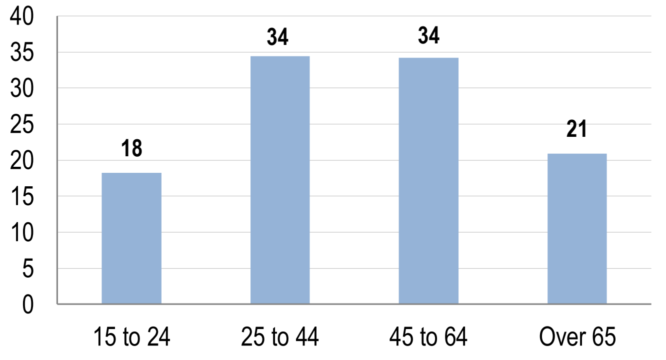
Typically respondents surveyed report that they serve on average up to 50 customers per day; however circa half did not provide an answer to this question. Asked whether they are serving more or fewer customers than a year ago, responses are evenly split; a third more, a third less and a third the same.

Retailers consider that many (over half) of their customers live within or close to Hertford.

Gender



Age Profile



4.0 Retail Operators Survey

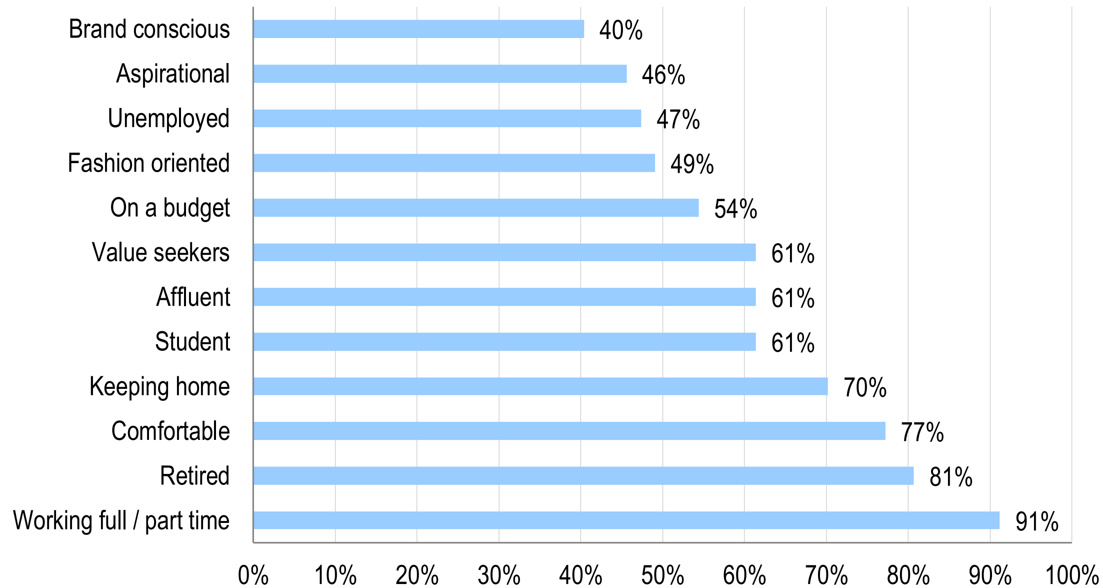
4.3 Customer Characteristics

Respondents were asked which characteristics best describe their typical shoppers.

The chart opposite illustrates the responses obtained. The question allowed more than one selection to be made and therefore responses do not total 100%.

Responses reflect the age profile with the majority of shoppers described as 'working'. Typical shoppers are also described as 'comfortable', while affluent and value seekers are important additional groups.

Retired shoppers are also clearly identified as an important consumer group, with students and those 'keeping home' also present in the town centre at significant levels.



4.4 Reasons for Visiting Hertford

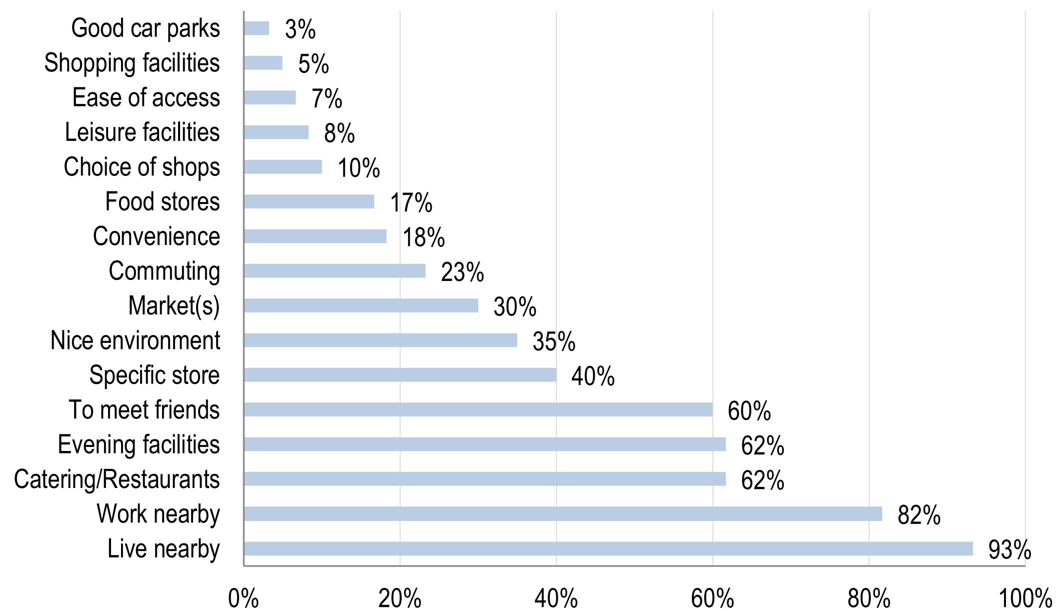
Retailers were asked to indicate from a list of options, why shoppers choose Hertford. The graph illustrates their responses.

Reasons focus on the convenience of the location, it's close to where people live or work.

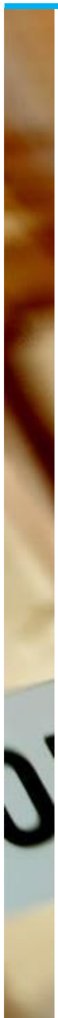
Herford also clearly has an important social role; with meeting friends, eating / drinking and evening facilities all secondary reasons for visiting.

Shopping appears to be targeted, 'specific shop', rather than general shopping which reflects the limited nature of the current retail offer.

The market and environment also appear to add to its appeal.



4.0 Retail Operators Survey

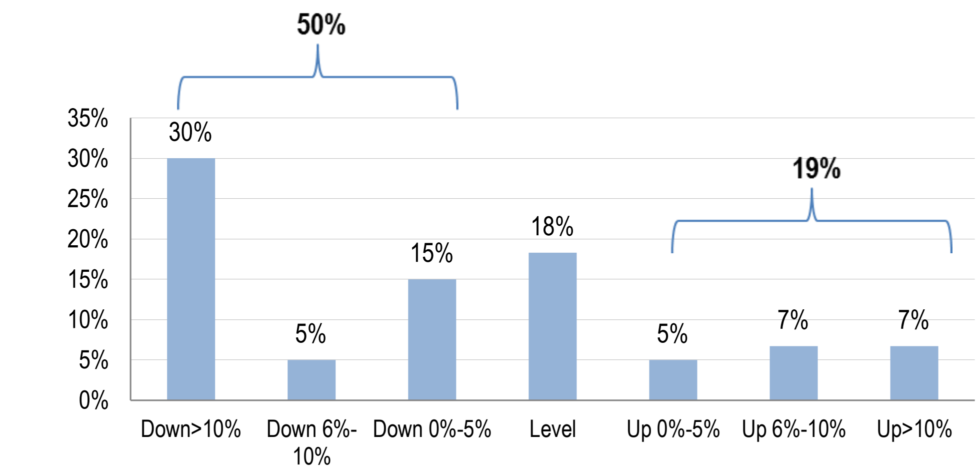


4.5 Trading Patterns

The majority of respondents (87%) provided information on current turnover trends; the graph illustrates trading patterns compared to last year.

Current trading is difficult with circa half of those who responded reporting that they are trading down on the year. Reasons, where given, included footfall and parking.

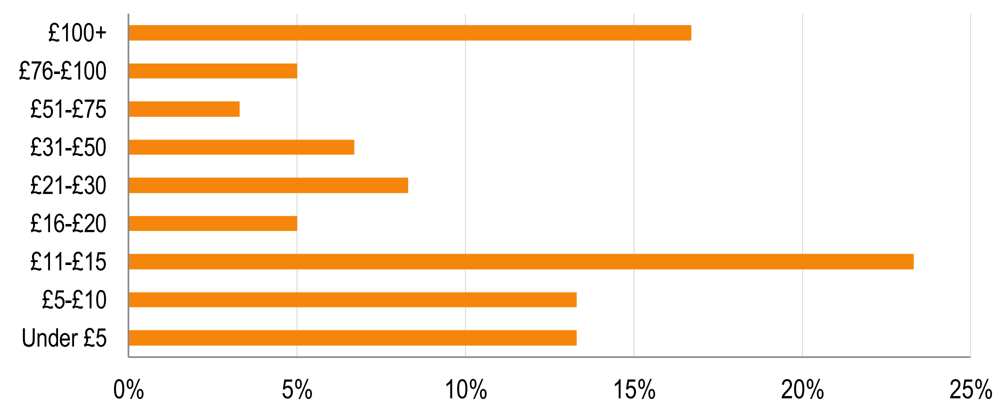
This appears to be an ongoing trend; retailers were also asked to compare current trading to 5 years ago, while around half did not provide an answer, of those who did most are down.



4.6 Average Transaction Values

The majority of respondents also indicated which band their typical ATV fell into; the chart illustrates the responses received.

While ATVs are spread across a wide range of values, two bands dominate; £11-15 and £100+ at opposite ends of the scale. Asked whether ATVs had increased, decreased or stayed the same over the last year, responses were fairly evenly split; 37% were the same, 28% decreased and 27% increased.



4.7 Strengths and Weaknesses

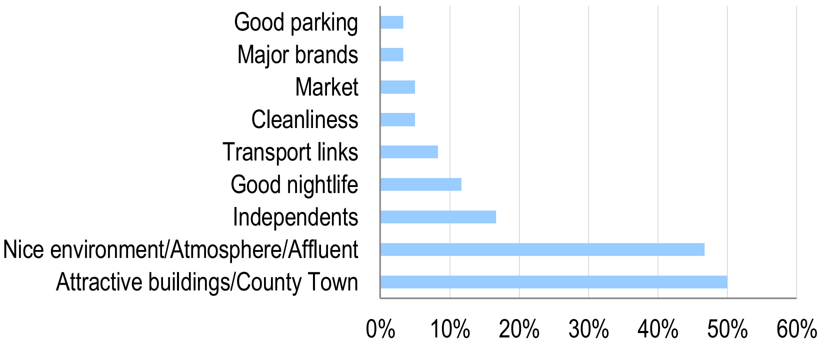
The charts illustrate the 'unprompted' responses in regard to the strengths and weaknesses of Hertford Town Centre (top and bottom charts respectively).

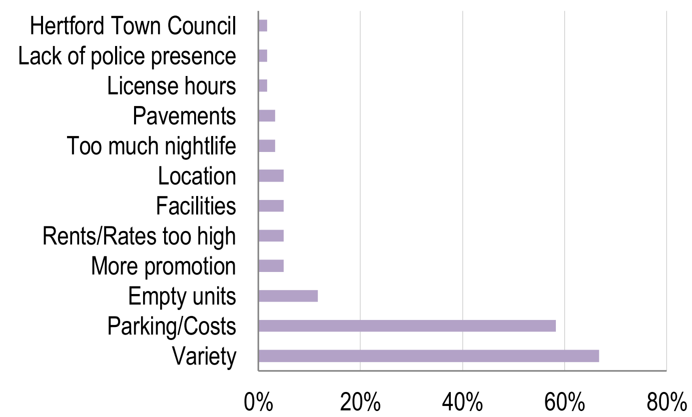
Retailers have a very clear view of Hertford's strengths and weaknesses.

Strengths focus on the aesthetic appeal of the environment and affluence of the location. In terms of weaknesses two clear issues dominate; parking and the limited choice and variety of shops.

A further question asked respondents what they would like to change most about Hertford Town Centre, answers reflected the identified weaknesses; parking and variety.

Additionally retailers were asked which product categories were weak in the town centre. Gaps are considered to be daytime shops and variety in general and more specifically clothing and footwear. A number of retailers also mentioned 'big' retailers in general and entertainment. In addition, 38% did not reply.





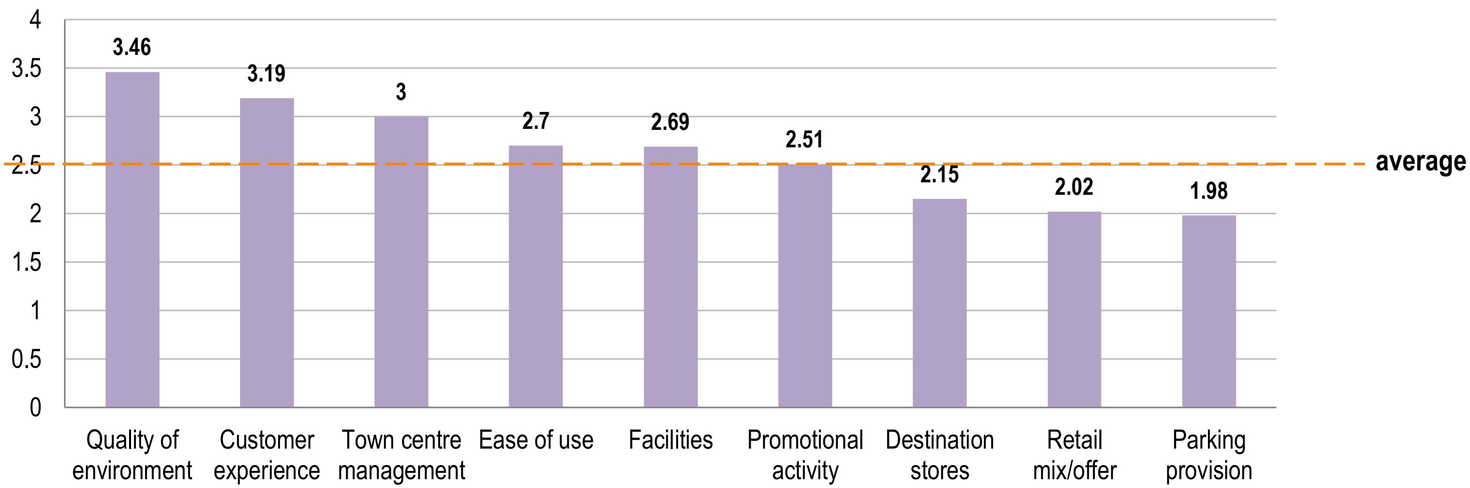
4.0 Retail Operators Survey

4.8 Town Centre Ratings

Respondents were asked to rate the town centre on a number of factors using a scale of 1 to 5, where 1=poor and 5=good, the chart illustrates the weighted average.

Factors that rate well are environment, customer experience and town centre management.

Parking rates the lowest, followed by the retail offer.



4.0 Retail Operators Survey

4.9 Other Appeal and Performance Factors

Almost all retailers (90%) surveyed consider that the trading hours in Hertford Town Centre suit customers needs.

Retailers were also asked about changes to their staffing complement over the last year; for two thirds (67%) this had stayed the same.

Accessibility by various modes of transport was considered on the whole good, slightly less so by train and by car; while over half felt by car was good there was a significant proportion who did not.

The night-time economy and both the weekly market and the monthly farmers market are considered to make an important contribution to the offer and are important to the town.

Main competing centres are considered to be Harlow (68% of respondents), Welwyn Garden City (62%) Stevenage (58%) and the Brookfield Centre (57%).

The majority (83% of retailers surveyed) plan to remain in Hertford, indicating they are loyal to and see future potential in Hertford as a trading location.

4.0 Retail Operators Survey

4.10 Summary

Hertford has a comfortable to affluent customer base and has a broad appeal, with workers, the retired, those keeping home and students all present in the town centre and important customer groups. The customer base has a female bias and is dominated by working age consumers.

The customer base is predominantly local.

Retailers are established in Hertford creating good stability, however there has been a limited injection of 'new' retailers. Current trading is difficult and for many it is on a downward trend. However trends over the last year in customer numbers and ATVs show a more mixed and divided picture; customer numbers and ATVs are almost equally a third up, down and static.

The convenience of the location and the social role of the town centre are key to its appeal.

Strengths and weaknesses are clear; environment and affluence are pluses while parking and lack of variety are clear minuses.

Hertford trades in the shadow of a number of nearby large shopping locations.

The evening economy and the markets are seen as positive contributors to Hertford Town Centre and potentially set it apart from the larger centres.

Encouragingly customer experience, environment and Town Centre Management rate positively.

5.0 Previous Studies: Research Extracts

A review of previous research studies undertaken and relevant to Hertford Town Centre has been completed. The purpose was to include a wide range of inputs and to ensure that the research was inclusive of any other relevant research and viewpoints.

The primary research study reviewed has been the extensive East Herts Retail and Town Centres Study Update completed by NLP, dated November 2013. Also reviewed were the PBA Report, October 2014 and public consultation feedback.

Noteworthy extracts are summarised below in the following bullet points;

Quantitative View

- Convenience capacity forecast to be satisfied till 2016, East Herts District could support 10,171 sq.m. (gross) to 2031.
- Comparison goods expenditure retention at 32% is low compared to convenience goods, reflecting the strength of the nearby competing centres; Harlow, Stevenage and Welwyn Garden City.
- There is an comparison expenditure deficit in the short term if all commitments are implemented with capacity in the longer term for 7,715 sq.m. (gross) to 2031.
- Scope for 22,358 sq.m. gross of retail floorspace (class A1-A5) by 2031 in the district over and above commitments.
- Vacant premises within designated centres are considered options to accommodate growth in the shorter term.
- There is significant housing growth forecast, the largest being the option for 10,000 new homes at Harlow North. This is considered to have implications for the distribution of retail growth, as a development of that size would most likely need supporting retail.
- Bishop's Stortford, Hertford and Ware provide the main comparison goods shopping offer in East Herts.
- Hertford was ranked 487 and Bishops Stortford 210 (Management Horizons Europe Shopping Index 2008) a notable difference between the two centres.
- In terms of existing retail provision, Hertford has 240 shop units and Bishop's Stortford 283.
- The proportion of vacant units is one of the most noticeable effects of the economic downturn in East Herts, with the most noticeable increase being in Hertford; 7 in 2008 (pre-recession) to 34 in 2013, an increase from 3% to 14.2% slightly higher than the national average (13.7%).
- The continuation of national trends is forecast to influence operator requirements in East Herts with new and existing retailers looking for larger units in bigger centres and smaller vacant units becoming less attractive.
- The study considers retail development in East Herts to be necessary if existing market shares are to be maintained in the future.
- In Hertford specifically it is considered there is limited retail capacity for additional convenience goods if the Tesco extension and Ware Asda commitment are implemented. There is considered to be emerging comparison goods capacity by 2031 of 3,900 sq.m. (gross).

5.0 Previous Studies: Research Extracts

Qualitative View

- Bishop's Stortford and Hertford are the main centres in terms of number of units and amount of retail floorspace; Ware is also important but serving a smaller local catchment.
- The presence of markets in all 3 towns is considered to be an important feature and providing a key local service.
- All comparison goods categories are represented in Bishop's Stortford, while the range is more limited in Hertford and Ware; some categories not present and / or limited choice.
- The proportion of F&B (A3/A5) is higher within Hertford than the national average.

Extracts from Supporting Surveys and Appendices

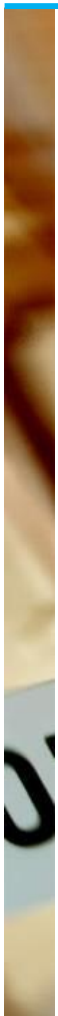
- The Hertford study zone is defined as the following five postal sectors, indicating a tight local catchment; SG13 7, SG13 8, SG14 1, SG14 2, and SG14 3.
- Population forecasts and expenditure estimates for this Hertford Study zone are shown in the table;

	2013	2016	2021	2026	2031
Population	35,932	37,019	38,978	41,088	43,312
Comparison Expenditure (per person)	£3,047	£3,222	£3,593	£4,135	£4,765

Extracts from Household Survey

- Main food shopping – Sainsbury's, Bishop's Stortford the most popular, followed by Tesco, Hertford.
- 20.4% of all respondents use farmers' markets, this includes 28.1% of respondents from the Hertford zone. For those that regularly use farmers' markets, the most popular market was the one at Hertford (38.7%).

5.0 Previous Studies: Research Extracts



Extracts from Household Survey contd.

The study found that the majority of non-food shopping is carried out outside the district.

Usage of pubs / bars at 74.2% is higher than the NLP average from other surveys (47.5%), with Bishop's Stortford and Hertford the most popular destinations; however the survey found that generally people tended to visit those in their closest main centre.

Usage of restaurants also appears to be popular at 90% and again higher than the NLP average (67.9%) with Bishop's Stortford and Hertford the most popular.

Shopper and Stakeholder Views

Shopper views when asked, "What, if anything, would make them shop more often in Hertford?"; over 50% indicated nothing / didn't know. Where views were provided, 20% mentioned 'better choice of shops', 11% 'more / easier parking', 'better choice of clothing shops' 8.5% and 'free parking' 7.5%.

Stakeholder comments related to parking, more events, more for the younger generation, creating a feeling of safe environment for the night economy, excellence in retail experience, no half day closing (Thursday), retailers to be more pro-active and all to have an online presence.

Hertford Location Audit

The centre's mix of units is broadly similar to the national average but with a higher proportion of service units.

Hertford has a good selection of comparison shops, below average are; clothing and footwear, electric / gas / music / photography, variety / department stores, toys / hobbies / cycle / sport and other comparison retailers.

The proportion of services is above average, largely due to the above average proportion of hairdressers / beauty parlours (35% vs. 25% of units). Below average are; restaurants and banks.

Summary of strengths and weaknesses identifies that strengths tend to be the existing reasonable mix, food anchors, market stalls and the environment. Weaknesses related to specific parts of the town centre; poor integration of Railway Street, environment along Maidenhead Street and narrow streets and pavements hindering pedestrian movement in places.

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5.0 Previous Studies: Research Extracts

PBA / PAS Report October, 2014

This report, while primarily focused on providing a review of planning policy, contains a wide range of supporting information on trends in the retail market place and draws the following conclusions;

- Many town centres face the issue of having too much space (The Retail Group comment – not really applicable to Hertford)
- In the future many towns will require a smaller, more focused retail core, repositioned for future consumer and retailer needs – and not focused on the past.
- The demand for retail floorspace in East Herts has slowed.
- However demand is changing, with increased uptake by restaurants in particular.
- It is recommended that the focus is not on expanding the space but expanding the offer to sustain vitality and vibrancy day and night.

Public Consultation Bircherley Green Shopping Centre

Public consultation on the proposed design plans for Bircherley Green Shopping Centre, updated October 2014 highlighted the following;

- Retail – many respondents commented on the need to improve Hertford's retail offer including introducing more large shops.
- Queries and concerns in relation to existing tenants at Bircherley Green Shopping Centre.
- Also commented on the importance of making provision for small / independent retailers.
- There were also comments indicating that more cafes / restaurants were not desired.
- The need for clothes and shoe shops was also raised.

6.0 Conclusions

The following section draws together key conclusions of the study, based on the findings of the research described earlier in the report.

The Bircherley Green Shopping Centre is not performing its role as an effective retail anchor

The centre occupies a fantastic position within the town, located in between the main east-west retail axis and the River Lea. It currently provides the main town centre foodstore provision, a range of multiple comparison goods stores, a pleasant townscape and the town's main bus station.

Unfortunately and universally, the four retail anchors are small and have limited appeal. Furthermore, the design of the building ensures many of the retail units and especially the fascias are hidden behind the building's many overhangs.

The centre would benefit from being more visible and bigger units, more impactful retail fascias and more external retail activity / tables and chairs.

Better use of the river frontage would also help to create a more aspirational and unique retail experience.

Hertford Town Centre is a social place

The café / restaurant offer in the town is visibly busy across the trading day (outside as well as including lunch). Where external tables and chairs are provided they are often fully used. This includes the units inside Bircherley Green and also Railway Street, Fore Street and especially Parliament Square.

Given that much of the existing F&B offer is basic and targeting the mass market or cheap fast food, this appear to suggest considerable demand for more F&B units in the town.

Average unit sizes are very small

As has already been identified in regards to the Bircherley Green Shopping Centre, but equally applicable across the town (with the exception of Fore Street), average unit sizes are small and below modern retail standards for a town of Hertford's size and role.

This is likely to be reducing the appeal of the town to new retailers.

The foodstore provision around the town centre is excellent

Both JS and Tesco trade from very large (40k net +) stores adjoining the town centre boundary. M&S have an effective and visibly trading well store on the town centre boundary at the end of Railway Street.

This would suggest limited demand for a large supermarket in the core of the town centre. This does not of course preclude demand on top up / basket grocery requirements.

6.0 Conclusions

The weekday street trading provision in the town centre is basic

Whilst the existing stalls (typically 2-4 stalls) are reasonably well delivered, they are not attractive enough, visible enough, dynamic, memorable or big enough in quantum to be called a market!

Markets and street trading can play a great role in attracting footfall to a town centre or indeed a particular part of the town centre. It is unlikely the existing street trading provision is satisfying that role in Hertford. Furthermore, signage to the street trading and market provision is non existent and therefore the offer is not helping to distribute footfall across the town.

The good news is the Saturday market is stronger, as is the monthly visiting Farmers Market. We understand that both successfully generate footfall into the town centre as well as improve the customer experience.

The town centre lacks a memorable and strong retail heart

Market towns often have large, open and permeable market squares. Hertford does not.

Many strong market towns have clear centres of activity where footfall is often highest. Again, Hertford is coming up short.

At the point where sightlines should be most impactful and most permeable (Railway Street / Salisbury Square / Bull Plain intersections), the street offer is constricted, narrow and provides very limited visibility to other parts of the offer.

St. Andrew Street and Old Cross are physically disconnected from the core town centre offer

St. Andrew Street and Old Cross contains come of the leading independents in the town centre. Certainly the most consistently upscale and with a strong theme (fashion, including home goods).

Unfortunately, the offer cannot be seen from the core town centre. Furthermore, the route down to St. Andrew Street and Old Cross passes through one of the weakest retail offers and environments in the town centre (Maidenhead Street).

Even from the end of Maidenhead Street / intersection with The Wash, it is not clear that there is an historic and appealing independent offer less than two minutes' walk away.

Maidenhead Street presents an unattractive and unappealing retail experience

Maidenhead Street is dominated by service retailers, especially financial services. The value comparison goods offer is quite dominant visibly.

The street has a number of management issues, which are reducing the shopper experience; plethora of A boards, external trading from pallets on the floor and frequent abuse of the pedestrianisation order. It is not uncommon to see cars travelling up the street or parking during trading hours.

Given it's importance as a key east west route, plus access route to the library / cultural offer, as well as to the St. Andrew Street / Old Cross offer, Maidenhead is currently providing a very poor lasting impression of Hertford Town Centre.

6.0 Conclusions

The river frontage is a significantly underutilised asset

Hertford is very unusual in that it has a very attractive and well maintained river running through the middle of it.

Despite this, there is little retail or F&B activity that takes advantage of it (with the exception of Starbucks and The Woolpack / Barge pubs).

This is a significant missed opportunity. The retail appeal and experience across many towns in the UK would benefit from such an asset and opportunity.

Hertford's future retail needs and opportunities

As has clearly been identified in the preceding section, there are a number of issues that are holding back Hertford from realising it's retail potential, as well as influencing current levels of under performance.

THE RETAIL GROUP

7.0 Hertford's Future Retail Needs and Opportunities

Introduction

As has clearly been identified in the preceding section, there are a number of issues that are holding back Hertford from realising it's considerable retail potential, as well as influencing current levels of under performance.

Hertford's future retail needs

In order to maximise its future performance, Hertford needs:

1. More recognisable multiple operators
2. More, bigger retail units available (circa 1.5-4,000 sqft.) including both comparison goods (at least 10-12) as well as F&B (4-6).
3. More recognisable and effective anchors
4. Better connections / routing within the town
5. Improved visibility of the retail offer
6. More external retail / F&B activity i.e. more external tables and chairs
7. St. Andrew Street and Old Cross to be more effectively integrated into the town centre core retail offer.
8. The town needs a stronger heart
9. There needs to be better linkages between the daytime and evening economies
10. The town needs more and better market stalls, events and activities
11. Better management of Maidenhead Street, including reduced shop front trading, traffic and 'A' boards / general pavement clutter
12. Much more effective signage and routing information
13. Should Waitrose relocate to the out of town Van Hage site in Great Amwell, it will be important that some foodstore provision is maintained in the town. This could be in the form of a Little Waitrose, or another similar quality convenience store
14. The service offer is wide, strong and dispersed across the town. Hertford would benefit from having a F&B that matches the quality provision and choice of its service offer.

7.0 Hertford's Future Retail Needs and Opportunities

Retail Opportunities

Whilst there are commercially available lists of the published expansion requirements of retailers, in our experience they are often both inaccurate and impropriate, e.g. The EGi website contains only 11 retailers expressing a requirement for Hertford, including Brighthouse (weekly payment retailer), The Works (deep stationery discounter) and Pets at Home (bulky goods).

Timberland and Steamer Trading company are the only retailers with a stated requirement that would be appropriate and add effectively to Hertford's offer. It is therefore important that appropriate and suitable retailers are identified are targeted.

The retail mix of a number of benchmark towns that share similarities to Hertford (in terms of its offer, customer base, historic environment, role and competing centres) have been analysed to identify suitable new retailers.

These towns include Dorking, East Grinstead, Hayward's Heath, Hitchin, Oxford, Reigate, Sevenoaks.

Furthermore, these retailers have been specifically chosen to help address Hertford's retail weaknesses as well as key requirements identified on the previous page.

The list is indicative and illustrative, and for the sake of clarity (as its beyond the scope of this study) these retailers have not been approached to confirm their interest.

sweatyBetty

CÔTE

gbk gourmet burger kitchen

WHITE STUFF

Phase Eight

JONES BOOTMAKER

AVEDA

fat face

CREW CLOTHING Co.

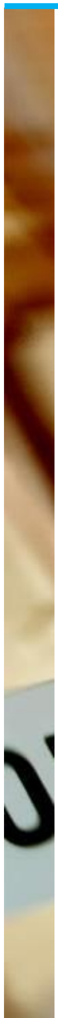
JoJo maman bébé

LAURA ASHLEY

Cath Kidston

COOK Remarkable Food For Your Freezer

7.0 Hertford's Future Retail Needs and Opportunities



Should Hertford have a Business Improvement District (BID)?

Background to BIDs

A Business Improvement District (BID) is a body that represents a specifically defined area of a town or city, where members / ratepayers have voluntarily voted to contribute financially to its management, to help improve its retail health, performance and promotion. In effect to become the 'voice' of that location and provide leadership in its management. BID members are usually the retail occupiers, although landlords often contribute on a voluntary capacity.

BID's allow ratepayers to have a say on the retail priorities in a given location.

A YES vote is measured by:-

1) At least 50% of those voting must vote in favour
2) Those voting in favour must represent a greater total rateable value than those voting against

Focus of BID's

Local priorities are usually captured through consultation and regular research, and can include:

- Better management of cleanliness and hygiene, including specific issues such as gum or graffiti
- Improved street management, including safety and security
- Generation of additional footfall and trade
- Creation and management of marketing and events programmes, including visiting markets
- PR direction and management, including emergency liaison
- Focus on need for destination management and / or regeneration
- Provision of a resource for staff recruitment

Other benefits of BID's

BID's can also provide networking and support frameworks, a specific focus on independent retailers, business cost reduction and liaison with bodies such as Councils, Police and the press

7.0 Hertford's Future Retail Needs and Opportunities

Should Hertford have a Business Improvement District (BID) contd.**?**

Extracts from ATCM Manifesto

Business Improvement Districts

…The key difference from other funding approaches is that once a majority of businesses within an area vote in favour of a BID, all businesses in the area are committed to contribute throughout the life of the BID, a maximum of five years. More BIDs will enable many town and city centre management initiatives to deliver on their Strategic Plans effectively and with more certainty.

Since the introduction of BID Regulations in 2004 in England and Wales and 2007 in Scotland, BIDs have become a recognised driver for change in a number of towns and cities.

This model provides the local business community with the opportunity to be proactive and self-reliant through an effective delivery mechanism.

Is a BID needed in Hertford?

As has been identified in this report there are a number of areas which are holding Hertford back from achieving its potential as a retail destination. These include (and are not limited to)

- Promotion and marketing of the whole town centre
- Lack of new retailers / entrants
- Limited provision of visiting markets
- Limited events programme
- Poor management of Maidenhead Street
- Need to attract inward economic activity to help fund regeneration
- Poor signage / routing in the town centre

So on the face of it, a BID would help to satisfy and resolve many of these issues facing Hertford.

In particular in would provide a unifying voice for the retailers across the whole town centre, which doesn't effectively seem to exist at the moment.

Having said that, they are not a panacea that will fix all Hertford's ails.

For a start they have to be funded. Local independent retailers may be resistant to pay circa £200 to £400 per year to fund such a body. Especially when many of them are struggling to trade effectively, as identified in the Operator Survey undertaken as part of this project.

Furthermore the ownership of Hertford retail offer we understand is quite fragmented outside of the Bircherley Green Shopping Centre. As landlord contributions are voluntary, getting a body of individual landlords to buy into a greater good can be difficult and time consuming.

So to answer the question, yes Hertford would benefit from the introduction of an effective and representative BID, however it will be a challenging task to get one launched, voted-in and funded.

7.0 Hertford's Future Retail Needs and Opportunities

Recommendations for Improved Town Centre Management

The Conclusions section identified specific factors that are reducing the performance of Hertford's retailers. Management actions that will help to address these issues include;

- Develop and publish a Strategic Retail Vision for Hertford Town Centre, as well three year action plan to deliver specific improvements
- Ensure Maidenhead Street daytime traffic order is enforced
- Develop, publish and police clear external trading guidelines
- Develop an 'A' board policy
- Introduce new signage and way finding package
- Introduce new Independent Retailer Trail
- Undertake a strategic review of the existing markets offer
- Encourage multiple retailers to lead retail masterclasses
- Develop seasonal promotional calendar for town
- Expand the visiting markets programme. Consider opportunities to have markets in different locations across the town
- Develop New Retailer Prospectus to 'sell' the town's retail opportunities

The following section identifies how many of these tasks fall within the remit of Town Centre Managers.

Key Roles of a Town Centre Manager (paraphrased from Great British High Street, DCLG)

A Town Centre Manager is somebody who is employed to come up with ways to improve the entire high street or town centre, and lead or facilitate their implementation.

This involves working with their local businesses and coming up with ways to make the town centre better, so they might think about improving signage or looking at parking for instance.

They are often employed by local authorities, but also sometimes by BIDs or Town Teams, or other public/private partnerships.

A more detailed description of typical tasks a Town Centre Manager will be working on, can be seen in Appendix A, as contained in the Boscombe Town Centre Manager Job Description. As can be seen, many of the usual tasks and responsibilities will cover the list of improved management tasks needed in Hertford, as listed in column 1 opposite, e.g.

8. Work with partners on promoting and organising events in the town centre, including preparation of promotional material.

11. To develop, extend and promote the market.

7.0 Hertford's Future Retail Needs and Opportunities

Should Hertford have a Town Centre Manager?

The above question is a specific requirement of the brief. As Hertford already has a part time Town Centre Coordinator, it is assumed the question relates to the creation of a full time Town Centre Management role, with appropriate responsibilities.

As can be seen, particularly in the Appendix, a full time Town Centre Manager would focus on the range of issues that are holding back Hertford's retail performance.

They would also provide a strong unifying and visible voice to pull the town centre's retailers together. Furthermore, many of Hertford's issues are tactical and therefore fixable. So subject to funding, support and direction, Hertford's retail offer would certainly benefit from the appointment of an experienced full time Town Centre Manager.

Are there any other options or models for improved town centre management?

Effective town centre management is usually undertaken via a BID and / or a Town Centre Manager in sub-regional and regional towns or cities across the UK.

Occasionally the role is funded by a Town Centre Partnership, where major retailers, landlords, local authorities and (rarely) major employers voluntarily contribute to the creation and regular participation of a partnership which exists to manage / improve a large town or city.

The Town Centre Manager will usually report to and be accountable to that body. Hertford is unlikely to have sufficient major retailers (in large stores) or landlords to make such a scheme viable.

Over the past couple of years, a large number of Town Teams (circa 380) have been created as part of the Portas Pilots. These teams received £10,000 funding from BIS to kick start their existence and part fund initial projects, however this initiative has now ended.

This could be an option for Hertford if more central funding is made available and the scheme extended, although the budget available is obviously very limited in terms of how much of a difference it could make in Hertford.

So to conclude, both a BID and a Town Centre Manager would be very useful delivery mechanisms to improve the management of Hertford's Retail Offer. The latter is likely to be more viable, given the offer is dominated by independent retailers more focussed on their own businesses, although it is dependent on sufficient funds are made available from the District Council to sustain the post for a minimum of two or ideally three years.

Perhaps a useful compromise would be a Town Centre Manager with an initial focus on addressing the issues identified, but with a medium term objective of preparing the groundwork for a BID, with the support of an additional third party specialist BID development partner to work with the Town Centre Manager and to take the BID forward up to the point of the BID vote.

Appendix A

Boscombe Town Centre Manager - Job Purpose & Objectives

Main Duties & Responsibilities

1. Develop successful partnerships with business, public and third sector organisations to ensure that high service standards are maintained and that issues and concerns raised are addressed.
2. To work with partners to create a town centre where shopping, working, living and doing business are positive experiences.
3. To liaise with relevant organisations to ensure the maintenance of the public realm.
4. To ensure that all relevant partners and stakeholders work together to deliver a vibrant, safe, accessible and sustainable town centre.
5. To build relationships with town centre businesses and keep them informed of (and consult with them about) relevant public sector developments.
6. Help gain sponsorship and other financial support for the town centre.
7. Work with statutory bodies and other stakeholders, including potential developers and retail landlords, on developing and regenerating the town centre.
8. Work with partners on promoting and organising events in the town centre, including preparation of promotional material.
9. Foster and develop relationships between businesses, Chamber of Trade & Commerce, Council, resident and community groups and other town centre interests.
10. To act as an ambassador for Boscombe.
11. To develop, extend and promote the market.
12. Act as first point of contact for issues relating to Boscombe Town Centre, including complaints and queries.
13. Provide cover for market manager/assistant manager as required.
14. Respond to enquiries from students, media etc.
15. To play an active role, as part of the Regeneration Team, ensuring the successful delivery of the Regeneration Partnership's Commitment to Boscombe.
16. Draw on best practice elsewhere and develop ideas and initiatives to ensure Boscombe Town Centre is thriving, diverse, safe, clean and creative.

Communication/Contacts

Daily contact with Boscombe Businesses.

Weekly contact with partner agencies including Police, Business Watch operators, Community Safety Accredited 'uniformed staff'.

Daily/weekly contact with the Boscombe Regeneration staff, including neighbourhood wardens.

Fortnightly contact with 'Outset Bournemouth' Business Start-up scheme to encourage new business investment into Boscombe.

Weekly contact with Ward Councillors or as required in response to specific issues.

Liaison with internal partners such as Trading Standards, Cleansing & Waste etc as required.

Bi-annual attendance at the Boscombe Regeneration Partnership Board to report on progress/issues.

The Retail Group

Informed Solutions

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