

## Appendix A



informed solutions

# Hertford Town Centre Retail Health Check

Final study report prepared on behalf of



October 2019

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# 1.0 Introduction to The Retail Group

## 1.1 Experience and Credentials

The Retail Group is a specialist retail management consultancy that provides informed solutions about 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, businesses 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 businesses, independents, service, catering and leisure operators.

We have defined future town centre strategies for over 250 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.

Locations we have worked near Hertford include Cambridge, St Albans, Luton, Hemel Hempstead, Biggleswade, Stevenage, Letchworth Garden City, Welwyn Garden City and Enfield.

## 2.0 Project Background and Objectives

### 2.1 Project Background and Approach

In 2015 The Retail Group undertook a health-check of Hertford Town Centre, as part of an overall team led by Tibbalds Planning & Urban Design, who in turn had been tasked with delivering an Urban Design Strategy for the town centre.

The Retail Group report identified that Hertford was generally in good health, trading well and had lots of opportunities to improve and extend its retail offer and consumer experience.

At the time, the intention was that many of the town centre opportunities would be realised through the redevelopment of the Bircherley Green Shopping Centre, the town centre's main retail anchor.

The developers behind the scheme (Wrenbridge) have since pulled out of the scheme and sold their interest to Chase New Homes Ltd.

East Herts Council has asked Tibbalds to review the 2015 study and ascertain the current position in Hertford in regards the town centre's retail opportunity.

### 2.2 Project Objectives and Approach

- Assess the current retail health of Hertford Town Centre
- Identify opportunities to improve the retail appeal of the town centre
- Assess potential likely demand from businesses for Hertford

As with the previous study, two key areas of research have been undertaken; an in depth survey of Hertford's town centre businesses and an objective review of the town centre offer from the perspective of consumers.

## 3.0 Operator Survey

### 3.1 Overview

A bespoke questionnaire was developed.

The survey area is as shown opposite.

138 surveys were handed out across the extended town centre area on Wednesday 7 August and Thursday 8 August. 93 completed surveys were collected the same day

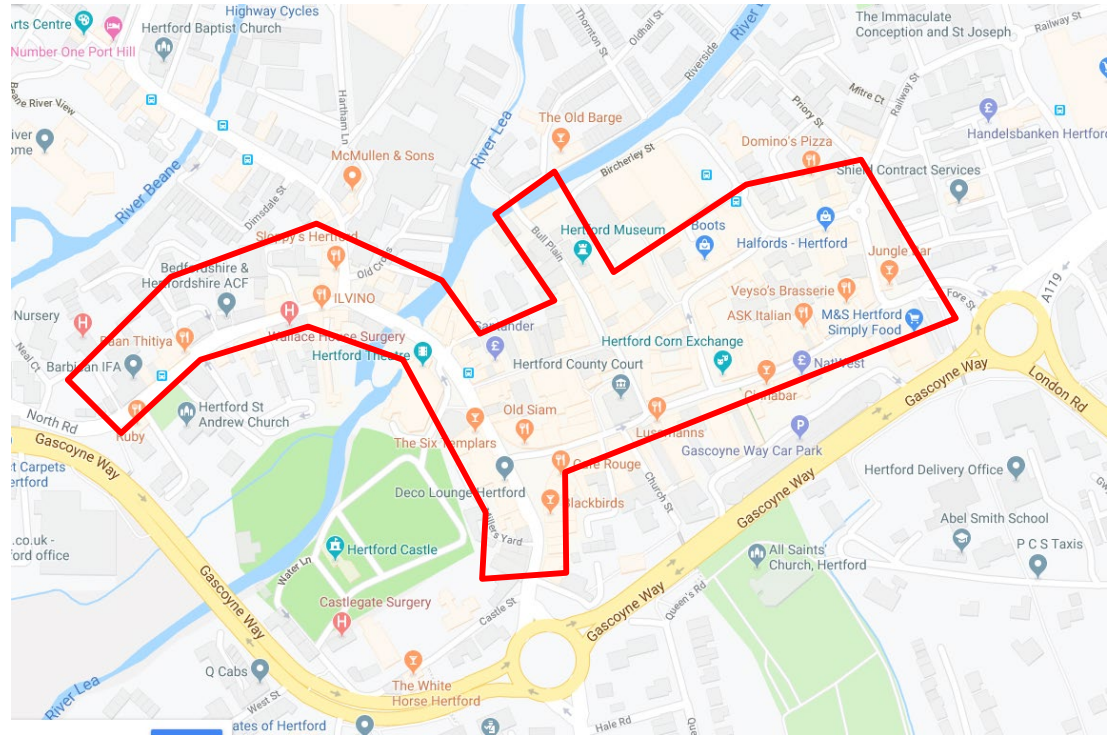
In addition Hertford Town Council also very kindly subsequently emailed the survey to town centre businesses.

A further 14 surveys have subsequently been received by email and post.

This is a fabulous response, producing an **excellent dataset of 107 respondents** for robust analysis and interpretation.

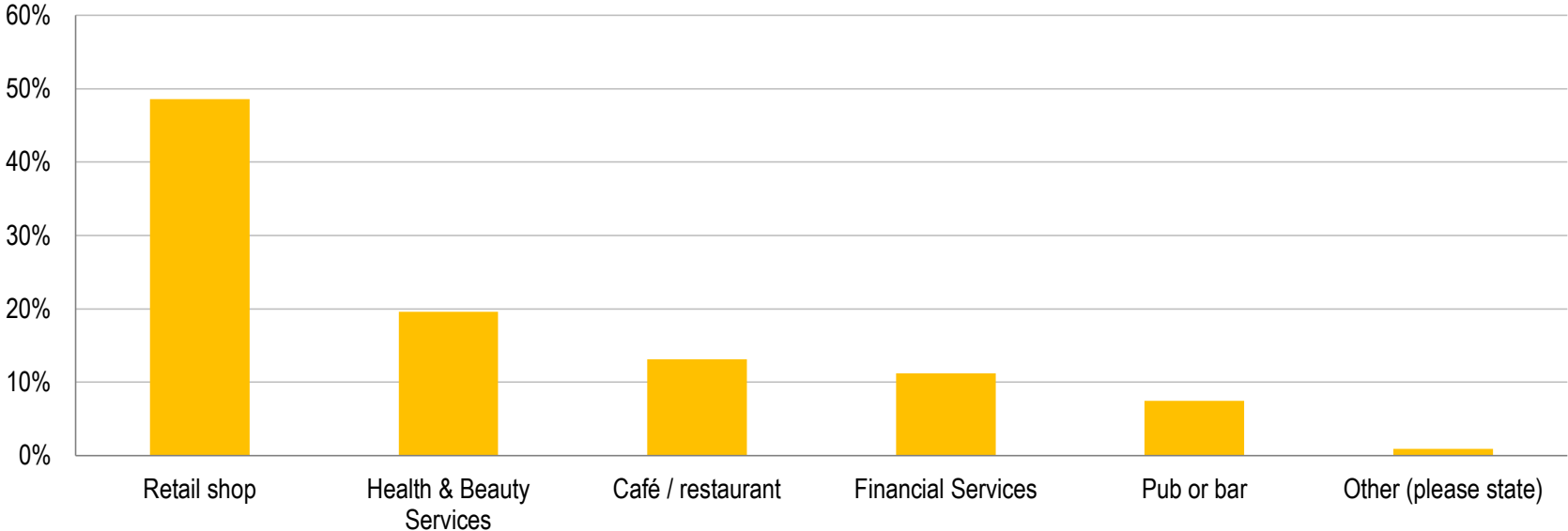
This represents circa half of the current active retail businesses in the town centre.

There were many negative references to the closure of Bircherley Green Shopping Centre expressed during the undertaking of the survey according to the field researcher.



# 3.0 Operator Survey

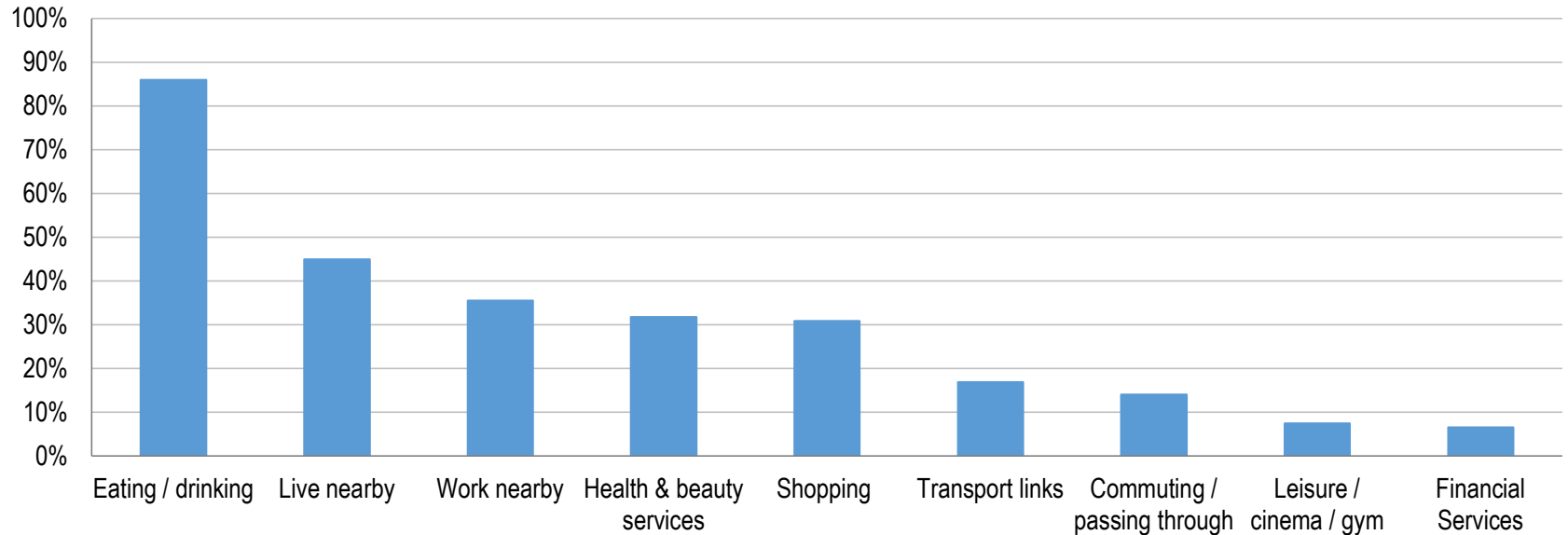
## 3.2 Type of Business



The majority of respondents were businesses, followed by service operators (health & beauty as well as financial) followed by food and beverage operators. It should be noted however that this was a daytime survey and therefore does not necessarily reflect the higher proportion of food & beverage (F&B) operators trading in the town centre as a whole.

# 3.0 Operator Survey

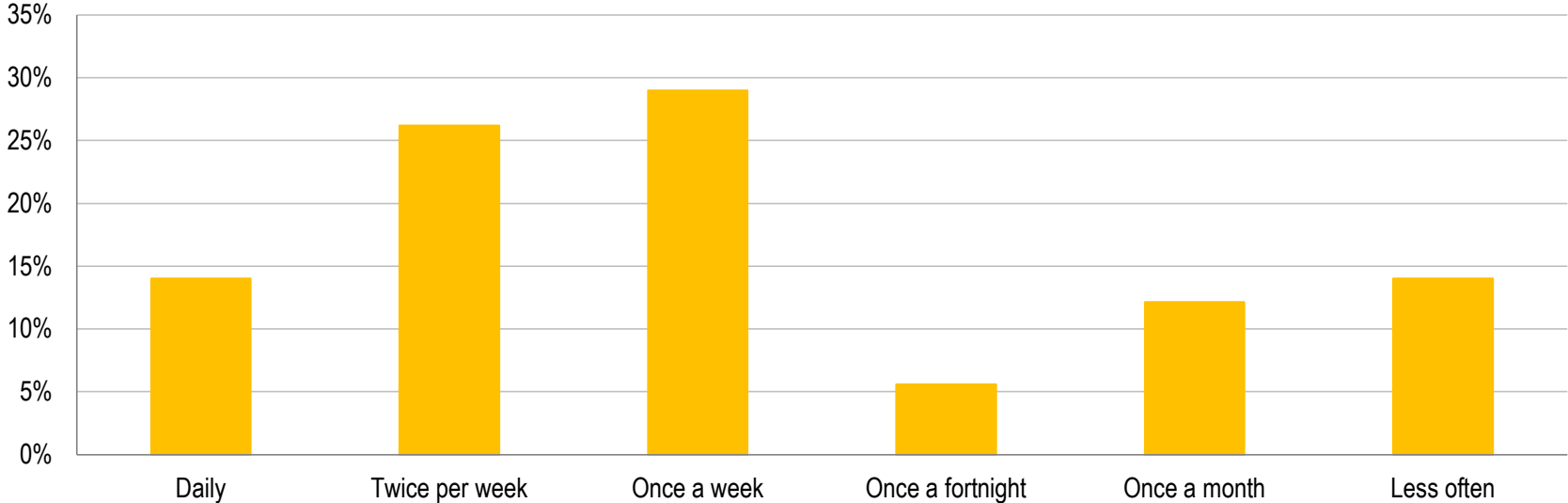
## 3.3 Main Reason for Customers to Visit



The strong eating and drinking offer in the town centre is clearly recognised as a major generator of visits. This is followed by an element of local consumers including residents and workers. Interestingly the health & beauty offer is seen as a slightly larger draw than the retail offer. Finally the good public transport links get a mention, along with the leisure offer and financial services bringing up the rear.

# 3.0 Operator Survey

## 3.4 Customer Visit Frequency



According to businesses, consumers are visiting Hertford on a frequent basis with two thirds of businesses saying their consumers are visiting at least once a week or indeed more often. Approximately a quarter of businesses say their consumers are visiting less frequently than monthly.



# 3.0 Operator Survey

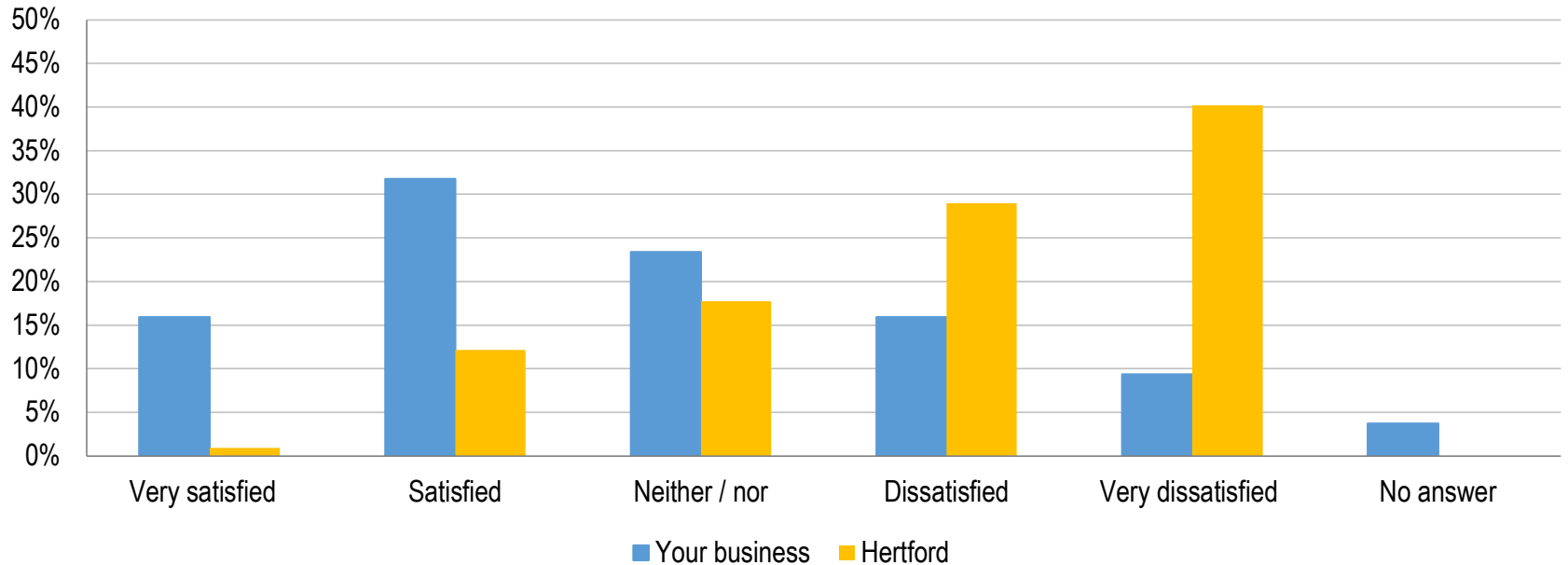
## 3.5 Average Transaction Values



Businesses report a pretty even spread of Average Transaction Values, covering low price items as well as high.

## 3.0 Operator Survey

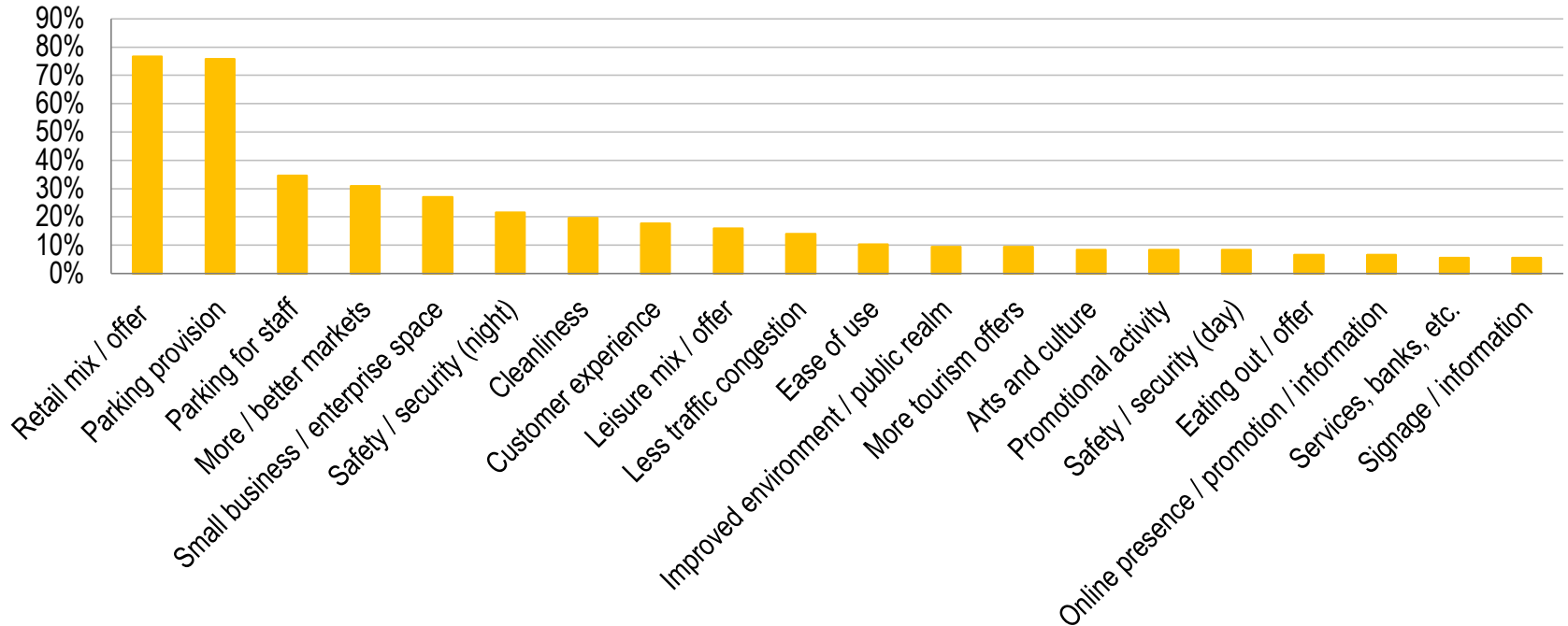
### 3.6 Satisfaction Levels



This question clearly identifies that all is not well in Hertford Town Centre. Whilst the majority of businesses are satisfied with the performance of their shops / outlets, they are also unsatisfied with the performance of the town centre. Nearly half are very dissatisfied. This is a significant finding and one of the lowest satisfaction responses we have ever received for a market town of a similar size to Hertford.

# 3.0 Operator Survey

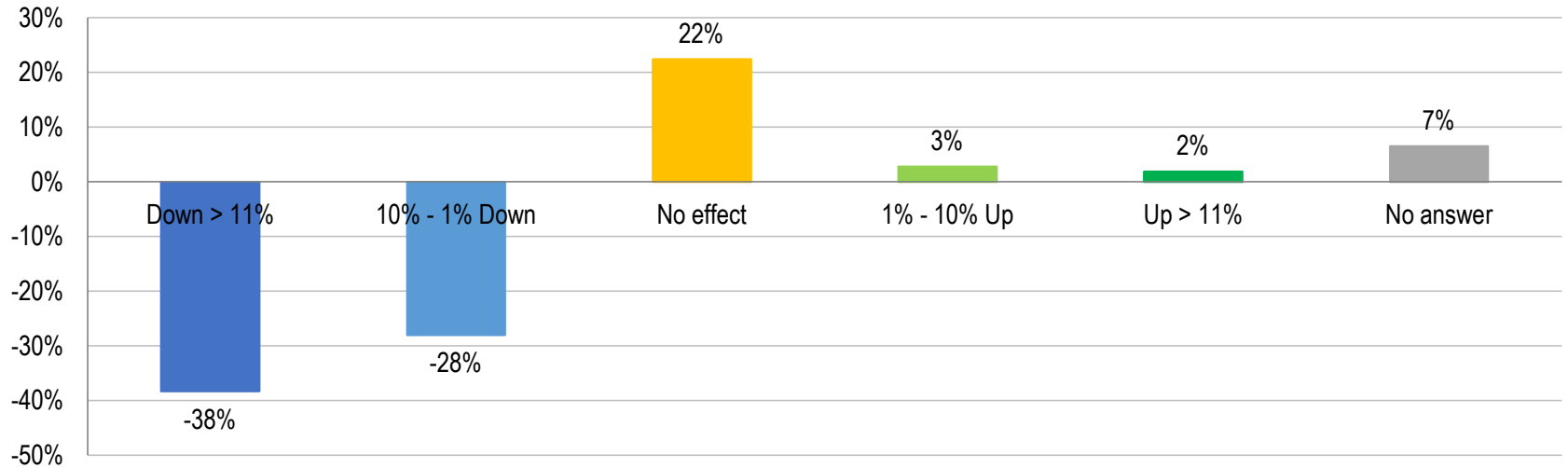
## 3.7 Town Centre Priority Improvement Areas



Whilst there are lots of improvements wanted, two dominate, and both are likely to be influenced by the closure of the Bircherley Green Shopping Centre, i.e. improve the retail mix (including leisure, tourism and arts & culture) as well as car parking. Many of the other improvements sought relate to a better consumer experience (safe, cleaner, ease of use etc) or an improved environment (public realm, less traffic congestion). A final consistent theme wanted by respondents was more events that generate footfall (e.g. markets, promotion, online information, better signage etc). Improved food & beverage (f&b) offer is not a requirement.

## 3.0 Operator Survey

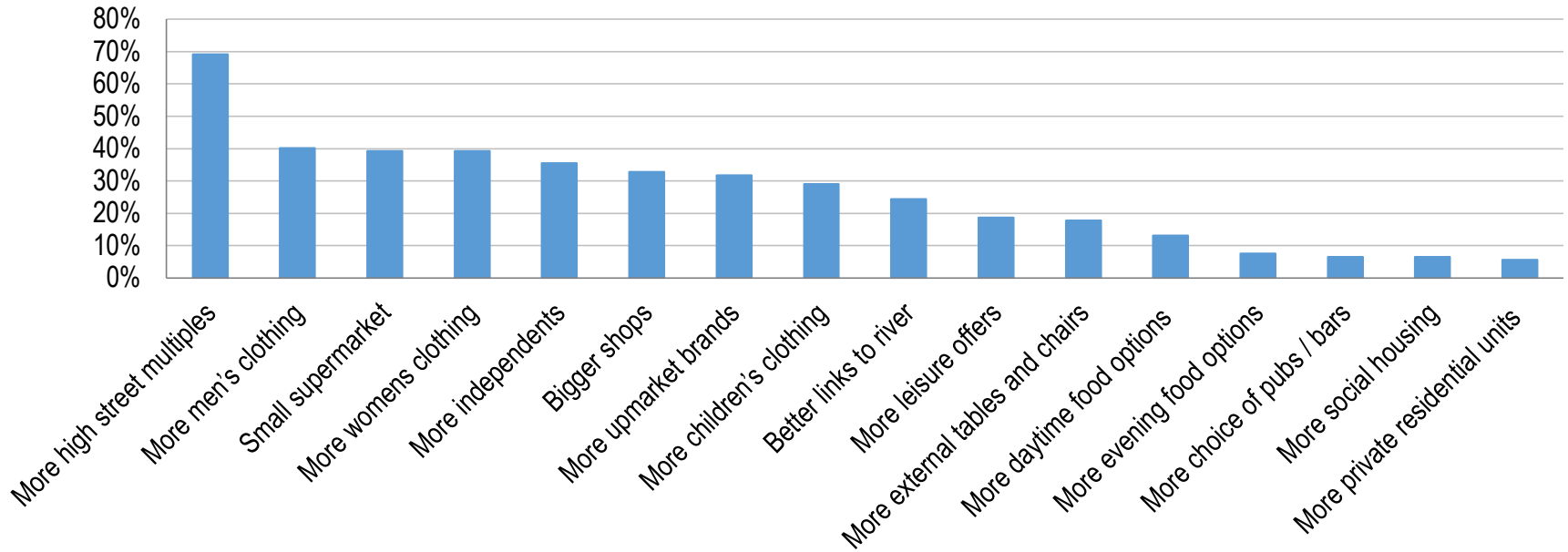
3.8 Affect on Footfall from Bircherley Green Shopping Centre car park closing



The closure of Bircherley Green and its car park facility is believed by businesses to have a significant impact on reducing footfall levels across the town centre. Over two thirds of respondents believe it has caused a drop, with most of these respondents believing it has reduced footfall levels in excess of 10%.

# 3.0 Operator Survey

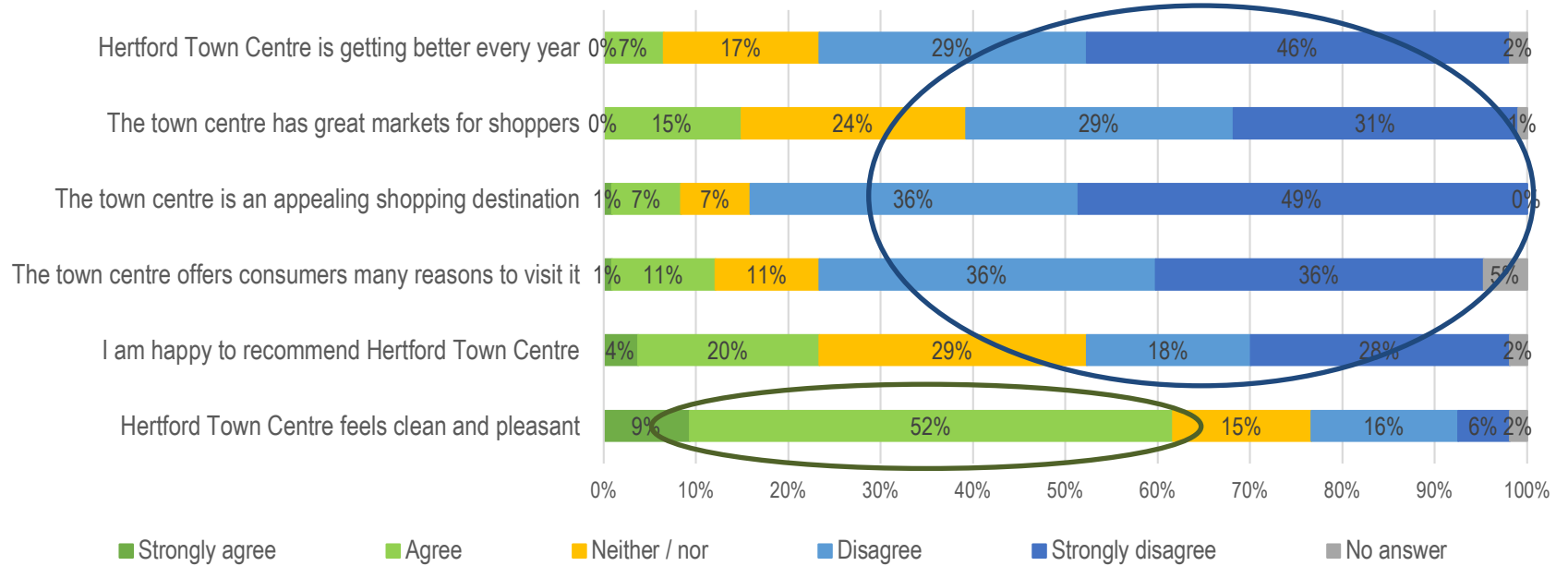
## 3.9 Preferred Content for Bircherley Green Centre



In regards respondents' preferred content for the new scheme, there were many credible suggestions and answers. Respondents want more layers of retail offer to underpin, expand and improve Hertford's appeal. This includes more high street multiples, men's / women's clothing, more food (grocery, daytime and evening), bigger shops, more upmarket shops, more leisure and better use of the river. The requirement for additional food & beverage offer is limited, particularly for any evening offers.

# 3.0 Operator Survey

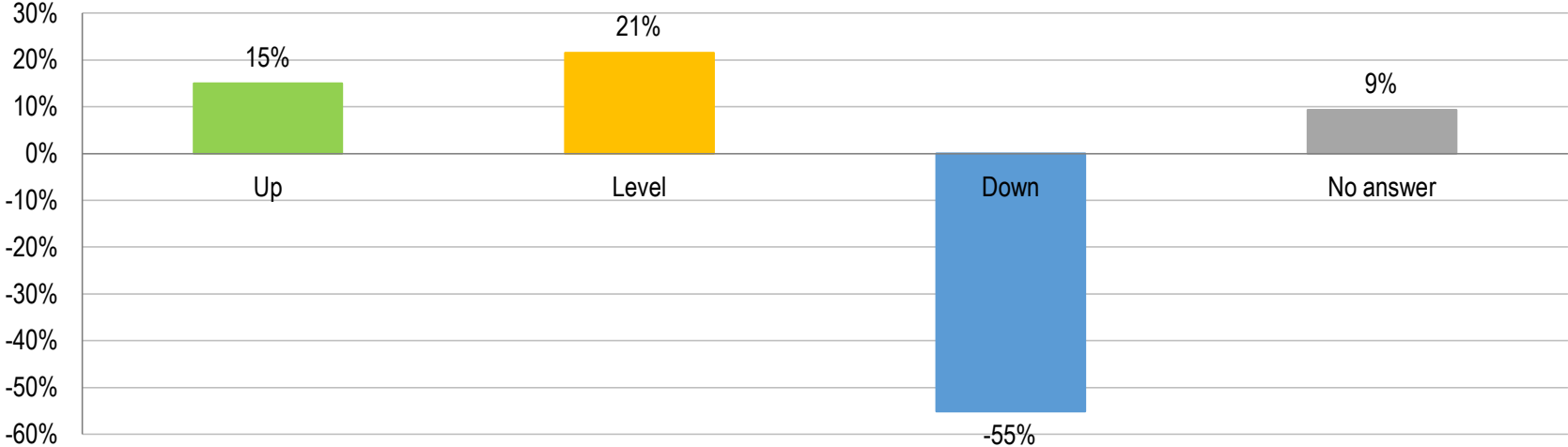
## 3.10 Views and Opinions



In regards general views and opinions about the town centre, this question captured quite negative responses. Respondents didn't feel the markets offer was good, nor agreed that the town centre was improving each year, nor had many reasons to visit it or was an appealing destination. The good news is that a few businesses would recommend it and most felt it was clean and pleasant. Whilst the tone of the response is clearly negative it does identify aspects for the town to improve.

# 3.0 Operator Survey

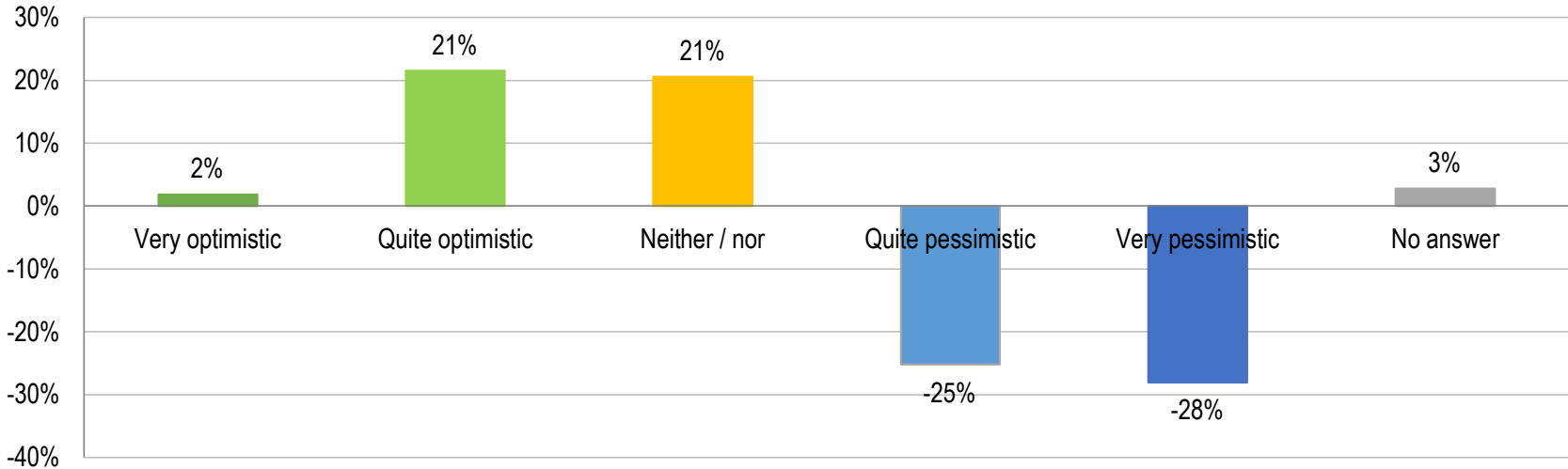
## 3.11 Year on Year Performance



Unfortunately and perhaps as expected (given the answers to the preceding questions), most businesses report poor year on year performance, with the majority of respondents saying they are down year on year. Encouragingly however a fifth report level performance and circa 15% report improving performance.

# 3.0 Operator Survey

## 3.12 Future Optimism



Looking to the future, currently Hertford does not present a positive picture. The majority of businesses (53%) expect performance in Hertford Town Centre to decline further. The biggest single response was from those that were very pessimistic.



## 3.0 Operator Survey

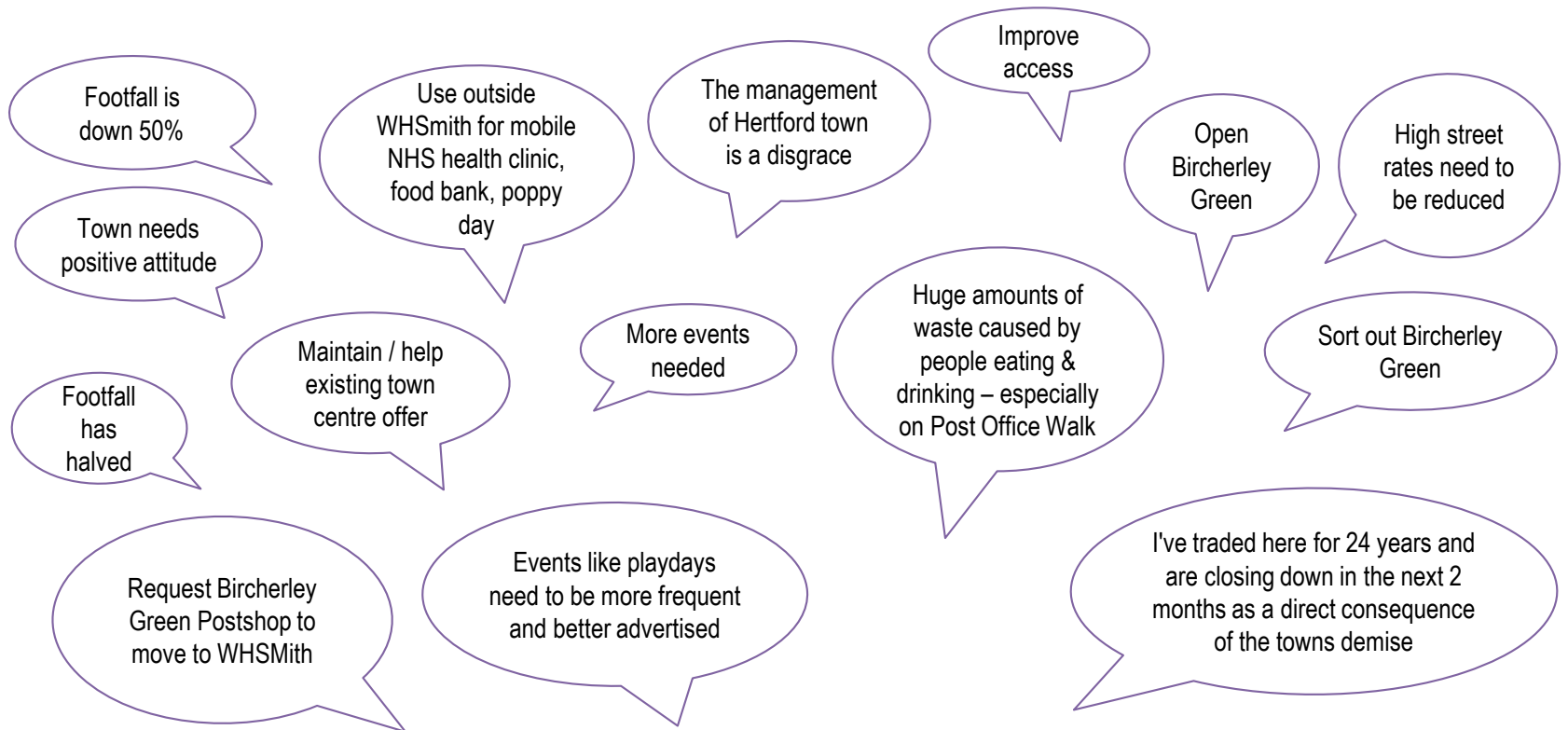
### 3.13 Miscellaneous

In regards additional brands / businesses wanted, these include (mentioned by two or more responses):

Operator wanted		Operator wanted	
Boots	22	High street brands	3
Waitrose	15	M+S	3
Superdrug	12	Primark	3
Next	10	Asda	2
Zara	7	Card Factory	2
Top Shop/Man	6	Clothes shops	2
H+M	5	Debenhams	2
New Look	5	JD Sport	2
John Lewis	4	TK Maxx	2
Nando's	4	Wagamama	2
River Island	4	White Company	2
Better / bigger markets	3		

# 3.0 Operator Survey

## 3.14 Miscellaneous Comments from Respondents



# 3.0 Operator Survey Summary

## 3.15 Operator Survey Summary

The findings of the operator survey can be summarised as follows:

<b>Positives and Opportunities</b>	<b>Negatives and Issues</b>
Hertford offers an established mix of business categories	The retail offer is seen as weak, and not a major trip generator
Strong F&B and service provision driving visits	Limited multi-purpose destination appeal
Satisfaction with business performance is good	Decreasing footfall
Broad range of Average Transaction Values (ATV's)	Poor satisfaction with town performance
Businesses are clear about improvements required	Trading is challenging for many and outlook is the same
Minority of businesses are doing ok and are positive about the future	Many retailers have negative views about the town centre as a place to trade
	The closure of Bircherley Green is believed by retailers to have caused many negative effects

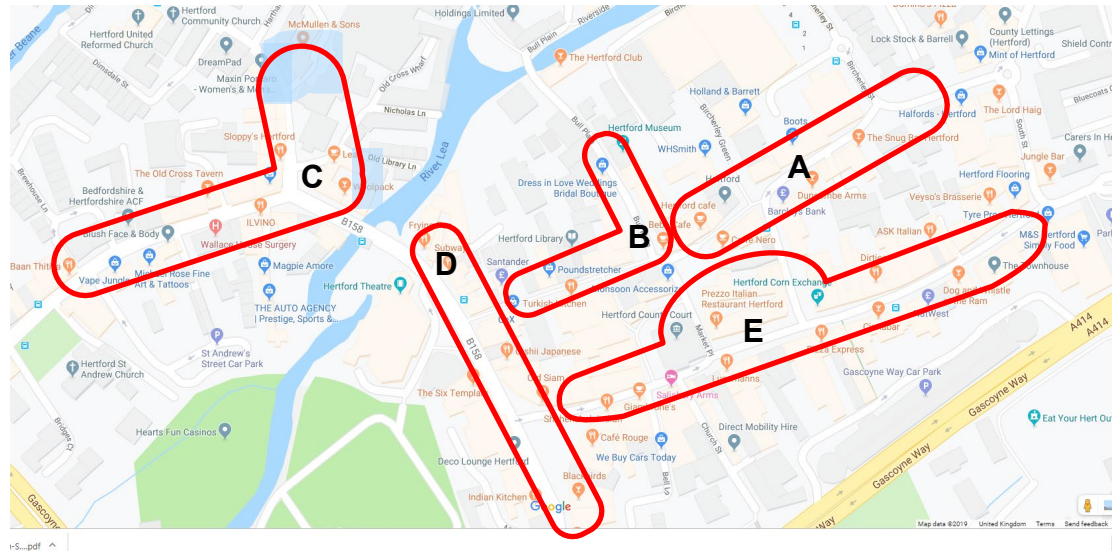
# 4.0 Retail Review

## 4.1 Introduction

A review of the Hertford Town Centre offer has been undertaken from the perspective of the consumer.

The purpose of the review is to assess the offer in terms of the retail mix, width and depth of the offer, layout, retail standards, vitality and overall retail experience.

The assessment has been undertaken by zones for ease of reference, as shown on the map opposite.



	Convenience		Comparison		F&B		Service		Vac		Misc		Total
A Railway Street	2	6%	9	26%	10	29%	13	37%	1	3%	0	0%	35
B Bull Plain / Maidenhead Street	3	7%	12	28%	7	16%	18	42%	2	5%	3	7%	43
C St Andrew Street / Old Cross	4	8%	9	17%	9	17%	16	31%	4	8%	10	19%	52
D The Wash / Parliament Square	1	3%	1	3%	15	45%	7	21%	4	12%	7	21%	33
E Fore Street	7	9%	12	16%	24	31%	27	35%	3	4%	4	5%	77
<b>Totals</b>	<b>17</b>	<b>7%</b>	<b>43</b>	<b>18%</b>	<b>65</b>	<b>27%</b>	<b>81</b>	<b>34%</b>	<b>14</b>	<b>6%</b>	<b>24</b>	<b>10%</b>	<b>240</b>

# 4.0 Retail Review

## A. Railway Street

Railway Street and Maidenhead Street form the main east west shopping street and daytime commercial heart of the town centre.

The mix is dominated by 13 service businesses (mainly financial), as well as 10 F&B operators (mainly daytime / pubs and bars). Other than the empty units in the former Bircherley Green Shopping Centre, there is only one vacant unit on Railway Street.

Bircherley Green Shopping Centre closed eight months ago as part of it's redevelopment plans.

Unfortunately the development has now stalled and this very visible and empty shopping centre is a blight on the town centre. The loss of Waitrose, Boots, New Look and Superdrug have had a significant affect in reducing the retail appeal of Hertford Town Centre.

The pedestrian environment is pleasant, streetscaping good and the offer appealing, with several good quality independent operators. The physical environment has improved since the previous study was undertaken (notwithstanding the visibly empty shopping centre of course).



# 4.0 Retail Review

## B. Bull Plain / Maidenhead Street

This is another location which has clearly improved in terms of the public realm and street management since our last study was undertaken. The paving stones have been replaced, businesses are no longer trading externally on pallets and the no-car restrictions in Maidenhead Street are being enforced.

The mix is again dominated by service businesses, followed by comparison businesses and F&B operators such as £Stretcher, F Hinds, Accessorise, Costa Coffee. The street has only two vacant units.

Bull Plain in particular provides a very positive, pleasant, well maintained vibrant retail offer. Maidenhead Street contains most of Hertford's multiple operators although feels somewhat dominated by charity operators.



## 4.0 Retail Review

### C St Andrew / Old Cross

Although on the other side of the River Lea, this area is very much integral to Hertford's Town Centre offer. The quality and heritage of many of the shops and building fronts is very impressive.

The mix is dominated by health and beauty operators as well as good quality independent restaurants (e.g. Baan Thitiya, Il Vino and Old Cross Tavern).

There are also some very good examples of independent fashion stores, e.g. Women's Society.

The area has historically accommodated antiques and collectables traders, although these have declined in number with only two left.

St Andrews / Old Cross presents an attractive and vibrant retail experience and is a key element of Hertford's retail appeal and reputation as a county town. The service offer here is outstanding!



# 4.0 Retail Review

## D The Wash / Parliament Square

For much of its offer, this location has a pleasant feel to it, although it can feel car-dominated at certain times of the day. Along with Fore Street, it's the heart of Hertford's evening offer, with several pubs, bars, restaurants, cafes and of course, Hertford's main theatre.

Several of the units near the river would benefit from TLC in terms of several shop fronts, fascia and internal fitouts. It also feels very 'fast food', with several takeaway food options including a fish and chip shop as well as a kebab shop.

The rest of the F&B offer is better quality F&B, along with several non-retail uses. Curiously, there are four adjoining empty units to the south of Parliament Square (all closed in the last 2-3 years). This would suggest either a redevelopment scheme is underway or potentially the town centre boundary is shrinking to the south west?





# 4.0 Retail Review

## E Fore Street

Fore Street provides Hertford's secondary retail spine as well as anchors Hertford's Night Time economy. The street is in good health and contains 24 food and beverage operators, many of which are high quality independent operators. The service offer is fabulous, with 27 operators, mostly financial services and health and beauty. Only three out of 77 units are vacant.

There are some examples of original shopfronts (e.g. Salisbury Arms and Hertford Beauty Clinic) to the west of the street near to the war memorial. Several units such as Unico and the Dog & Whistle are also double fronted, adding to the credibility and gravitas of the offer.

M&S anchors the convenience offer on Fore Street, trading from a Simply Food unit at the eastern end of the street.

The streetscape is wide, well maintained and easy to use.

Many market and country towns would give their right arm to have such a strong, vibrant and distinctive asset as Fore Street.



# 5.0 Conclusions

Whilst we have not been tasked with identifying recommendations, we are able to draw a number of conclusions, these include:-

## **5.1 Many town centre businesses in Hertford are currently struggling**

This project has included the most comprehensive survey of town centre businesses ever undertaken in Hertford. The survey probed performance in a variety of ways and it is a clear finding that many operators are currently struggling in the town centre.

Footfall is down, performance is down for many, and the future prognosis is viewed by some as 'more of the same' or challenging. This is likely to be down to a number of factors, the general economic malaise caused by the uncertainty of Brexit, the pressures on the economy from several years of austerity and growth of online shopping. It is also likely to be a direct affect of the closure of the Bircherley Green Shopping Centre and main shopper car park. Speaking of which ...

## **5.2 The vacant Bircherley Green Shopping Centre is broadcasting a very visible and major sign of decline and stagnation**

Losing the main town centre convenience store, several high street chains and other daytime cafes, parking and shopper facilities has reduced the retail appeal and reputation of Hertford Town Centre as a place to shop. Given that there are is currently no public timescale for the shops to reopen, this is causing lasting ripples of concern and negative PR for the town centre.

If no large or anchor status shops and / or F&B operators are reinstated in the scheme (or elsewhere in the town centre) this will permanently reduce Hertford's role and reputation as a place to visit and shop going forward.

## **5.3 There is a perceived lack of council activity in regards helping the town centre**

Many respondents in the survey provided additional comments in regards the lack of any perceived action and mitigating actions from the district and town councils to help the town centre thrive. They are typically seen as reactive, unconcerned and ineffective in regards managing the town centre offer.

Retailers want to see a better and stronger retail offer for sure, but they also want to see a better retail experience, better environment and more activity that generates footfall, such as bigger market, more visiting markets, more events and better promotion of the offer. These are all aspects that the district and town council can help to improve through better working together, clearer focus and additional resource.

There would be many benefits if an interim town centre manager with high level strategic and management experience could be appointed or contracted (part time basis), with a given focus on proactive business development, footfall generation and positive PR creation.

## 5.0 Conclusions cont'd.

### 5.4 Many positive indicators of potential remain

Despite the negative current performance, it's not all doom and gloom; there are actually many positive indicators in regards to Hertford Town Centre's future prospects and success going forward.

The town centre on the whole presents a very positive and rewarding retail experience. The service and F&B offers are very good, with a range of successful recognised multiple as well as independent operators leading the way. Both have a strong mid-market focus, which suggests they appeal to an affluent customer base. Whilst the shopper and catchment profiles have not been analysed, there are indicators of a mid market customer base.

The town centre presents a retail environment rich in history and heritage, with the quality of many well preserved and maintained shop fascias and building fronts combining to provide a memorable retail place. Its historic role and reputation as a county town would also seem to reinforce this.

The town centre has improved in many ways since our last study was completed 4 years ago. Vacancies are lower than the national average across the town centre as a whole, not including of course the closed shopping centre. There have been several new independent stores open, and four units are currently being actively refurbished in the town centre.

Hertford has many strengths to build on going forward, and when the economy eventually starts to improve, Hertford will be in a strong position to benefit from this.

### 5.5 Hertford needs a clear and visible Improvement Action Plan

The poor existing performance of operators and expressed lack of hope in regards future prospects would indicate Hertford needs visible, proactive and targeted support and intervention urgently.

The town centre needs an action plan that clearly identifies the appropriate and deliverable actions that can be undertaken to quickly and visibly improve the town centre in the minds eye of shoppers and retailers.

The plan will need to focus on actions that of course increase footfall and improve performance. This will need the support and participation of a number of stakeholders, including the district and town councils, retailers / operators and other local stakeholders such as commerce and tourism.

The plan will need to focus on actions that can be delivered immediately / in the short term (next 3 – 6 months) as well as medium term (6 – 24 months).

## 5.0 Conclusions cont'd.

### 5.6 Future Bircherley Green Scheme does need retail, but with flexibility built in

The future Bircherley Green scheme needs to provide a small food store, e.g. Little Waitrose / Tesco Express / Sainsbury Local, as well as a Boots Chemist and or Superdrug. These will act as anchors and footfall drivers. They will require circa 5,000 sqft. each. Units of this size would mean the convenience store can optimise its trading hours, operating from a net area that would enable it to trade all day on Sundays and extended hours in the week i.e. store will have option to trade from 08.00 to 22.00 everyday if demand exists.

In addition, there would be benefit for the town centre as a whole in providing a range of additional retail units of circa 1,500 – 2,000 sqft. to accommodate a variety of other uses such as additional convenience goods, e.g. deli, chocolatier, baker and or frozen food specialist, as well as services and comparison retailers, per the examples opposite. The size ranges identified are typical industry standard sizes for these types of retailers. As such they are likely to have shop layouts and fit out packages that are readily applicable for this size of store, which can aid the decision process.

We recommend the new scheme provides for up to 10 – 12 units of this size. This will provide the development with critical mass and help it to be effective as Hertford Town Centre's future heart. Having this number of units will also enable Hertford to maintain its current position in the local retail hierarchy. Furthermore it will help to counterbalance the perceived dominance of food and beverage outlets in Hertford Town Centre.

Indicative and suitable comparison uses include men's / women's clothing (e.g. Fatface, White Co, Crew Clothing), fashion accessories / gifts (e.g. Oliver Bonas), cards (e.g. Smiggle) and small household / lifestyle accessories (e.g. Flying Tiger).

Whilst we are aware that these retailers do not have published requirements for Hertford Town Centre, or that they may not be recognised as being on major expansion or site acquisition mode / opening lots of shops, many retailers are interested in locations that offer a strong trading potential and will consider suitable opportunities. Based on the research completed and our understanding of the Hertford customer profile, the retailers mentioned are likely to trade well in Hertford. Presented with the right information they may well be interested in the future.

It will be important therefore for the new scheme to have flexibility built in to its retail and leisure / convenience provision. It may well be in the short term, that other meanwhile uses will be necessary for the retail units e.g. pop up shops, galleries or children's play and community spaces.

Having flexible space incorporated within the scheme future-proofs the town centre, so that when the target retailers suggested above are in a position to expand, Hertford will be ideally placed to take advantage of this.

# Appendix – List of Respondents

# Survey Respondents

Albany Radio	Cinnabar	Halfords	Leaf Café	Roberto Gerrards	The Frying Pan
Anytime Fitness Hertford	Clock Cards	Helping Hands	Lloyds Pharmacy	Ruby Room	The Hummingbird
Ashwood Properties	County Care Cobblers	Hertford Coffee Lab	Lock Stock + Barrell	Sage Ward Estates	The Practitioner
Ask Italian	Designer Eyes	Hertford Picture Framing	Lord Haig	Saks Hair	The Six Templars
Azir	Dils Indian	Hertfordshire Physiotherapy	Love Flowers	Santander	The Sugar Smith
Baan Thitiya	Dirty's	Holland + Barrett	Magpie Amore	Scope	The Womens Society
Bebo Café	Dog + Whistle	Honey Lane Antiques	Margetts	Shaken Cow	The Woolpack
Belles + Shears	Edinburgh Woollen Mill	HSBC	Maxin Porcaro	Shepards	Thomas Childs
Beyond Beauty	EE	Irons Dry Cleaners	Mint of Hertford	Simply Homes	Tierney Salons
BHS	F.Hinds	Isabel Hospice	Monsoon / Accessorize	Specsavers	Tom Ashley
Blush	Fakin It	Issi	Mr Bransons	Spoons Kitchens	Toni + Guy
Boots	Five + Dime	Jewel of Hearts	Natural Health	ST Andrews Pharmacy	Tui
Boots Opticians	Flooring Shop	Keech Hospice Care	Natwest	Steven Oates	Turkish Kitchen
Botsford + Sons	Fore Street Employment Agency	Kids Connection	Paul Martin	Swappy Snaps	Vape Jungle
Café Nero	Frankie + Olive	Kings Group	Photography by Louise	Swords - Auctioneers	Well Pharmacy
Castle Flooring	Fred + Ginger	Ladbrokes	Post + Packing	The Beauty Room	WHSmith
Cavavin	Giambrones	Lance James Jewellers	Pound Stretcher	The Classic Barber	William Hill
CEX	Greggs	Lanes Estate Agents	Retail Therapy	The Duncombe Arms	



informed solutions

# The Retail Group

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