



Woking Borough Council Retail Topic Paper

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Produced by the Planning Policy Team

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1. Introduction and retail trends

- 1.1 This paper provides a snapshot of retail and wider A use classes in Woking. It presents background and analysis of economic and retail trends, to inform the Council's understanding of the current market. It then sets out the Council's progress to date in delivering the Core Strategy retail requirement of 93,900 sq m A1 to A5 uses, and how the Council expects to deliver the remaining requirement through the Site Allocations DPD and other means.

Planning policy context

- 1.2 The Council's Core Strategy was found sound at examination and adopted in 2012. It was reviewed in 2018, when it was considered that there was no immediate need to modify it. The review was approved by Council at its meeting on 18 October 2018. The Core Strategy contains a spatial strategy which includes an approach that directs most new development to town, district and local centres, which offer the best access to a range of services and facilities. The Core Strategy sets a hierarchy of centres, which includes distinct functions of each type of centre in the hierarchy. Within the approach to town, district and local centres, are development requirements and policy for retail uses and a range of other town centre uses, as defined in the glossary of the Core Strategy.
- 1.3 At the Core Strategy examination in 2012, this strategic context for the scale of development and where it would broadly be directed was considered sound, following consideration by the Inspector on whether the approach set in CS2 Woking Town Centre was compliant with national policy (at that point PPS4) particularly with regard to implementation of the additional 67,600 sq m A1 retail space in the town centre. The detail of allocating specific sites to deliver the proposals of the Core Strategy was assigned to the Site Allocations DPD, which would contain a comprehensive list of sites to enable implementation. Higher density, mixed use redevelopment and intensification of existing sites were considered to be the way of accommodating the scale of development required (Hearing 1, Matter 1, [WBC response to Inspector's Matters and Issues, Core Strategy examination, 2012](#)). This was considered to be effective, particularly with regard to flexibility and enabling a mix of uses within the secondary shopping frontages which could protect against changes that may damage the vitality and viability of the town centre (Matter 4, Hearing 3, covered within Matter 1, Issue 18 and 20 – see link above).
- 1.4 The Core Strategy policies on town, district, local and neighbourhood centres (CS2, CS3 and CS4) contain an evidence based approach to the amount of development required over the plan period, including retail and office floorspace, and housing. The proposed increase in retail floorspace were considered to be justified by the Town, District and Local Centres Study which used an approach to forecasts that was widely respected in the industry at the time (TDLCS, Roger Tym and Partners, 2009). This evidence was considered a sufficiently up to date and robust basis for the retail development requirements set in the Core Strategy, and were found sound at its examination in 2012. The Council's approach to development viability was also considered, and it was concluded that a professionally robust assessment of the issue had been undertaken, based on the Economic Viability Assessment, which supported the thrust and intentions of policy.
- 1.5 The Core Strategy sets specific development requirements for retail floorspace (A class and A1 retail floorspace) in the town centre, West Byfleet District Centre and Knaphill Local Centre

in policies CS2, CS3 and CS4. The Core Strategy delineates town centre retail frontages and identifies the mix of uses which will help to create a balanced and vibrant centre. This approach was supported by evidence and was found sound at the examination. The Site Allocations DPD allocates retail use at eleven sites (listed in Appendix 1) but does not give indicative quantum of retail uses in these locations. Such quantum are deliberately not included to allow the allocated sites flexibility to respond to market signals and to accommodate changing requirements. The Site Allocations DPD meets the National Planning Policy Framework's requirement that planning policies should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least 10 years ahead, but balances this with a positive, flexible approach to planning which enables adaptability and responsiveness to changing market signals and demand (paragraph 85, NPPF).

- 1.6 It should also be noted that the delivery of the Core Strategy does not sit in isolation, and is implemented alongside a number of strategies that evolve and are updated within the plan period. This includes Woking's Economic Development Strategy (2017-2022) and the work of the Local Economic Partnership, Enterprise M3, which has a Strategic Economic Plan (2014-2020) and has published a number of other reports and strategies that promote retail and business in town centres, particularly in Woking which is identified as a key growth town.
- 1.7 This paper considers the dynamic nature of Woking town centre and West Byfleet, including the successful bid for £95 million of the Government's Housing Infrastructure Fund (see paragraph 1.12 for further detail) and the changing retail market, to provide evidence to support the approach taken in the Site Allocations DPD, as a delivery document of the Core Strategy.

Retail trends

- 1.8 Seven years on from the adoption of the Core Strategy and its retail requirements, the retail sector has transformed and the wider economy has continued to evolve to respond to changes in technology, market signals and consumer demand. While the consumer economy is strong with high employment levels and increased consumer spending power, consumer confidence has stagnated, largely as a result of continuing political and economic uncertainty, including Brexit. Paired with the rise of internet shopping, which has seen rapid growth and now accounts for 20% retail sales ([Deloitte Retail Trends 2019](#)), rising costs and changes to shopping habits, closures of retail stores have been widely publicised in recent years. The Council's evidence base, the Town, District and Local Centres Study 2009, which informs the Core Strategy's retail requirement accounts for growth of Special Forms of Trading (which includes internet, catalogue and TV shopping) in its projections. However, it underestimates the rapid growth in internet sales that has taken place over the last decade, projecting an increase from 12.2% in 2009 to just 13.9% in 2026 for comparison goods, as opposed to the much larger (20%) sales share that we are seeing to date.
- 1.9 Some retailers have sought to rationalise their estates through store closures, while other businesses have taken more drastic action and closed completely e.g. BHS. These changes clearly have an effect on town centres, including Woking. While older channels of retail such as department stores have seen decline, successful retailers have re-invented retail with customer experience being key, and an acceptance that there will be fewer, better stores in

carefully chosen locations ([Deloitte Retail Trends 2019](#)). Therefore location, in terms of the socio-economic character of catchments becomes an important idea to help attract investment from successful retailers.

- 1.10 In terms of shopping habits, retail forecasts predict that we are entering a period of cautious consumption, with changing spending habits due, in part, to the uncertainties of Brexit. Forecasts predict that consumers will shop smarter, meaning people shop around more, buying more on promotion and in the case of groceries, buy more own label ([pwc 2019 Retail Predictions](#)). There has also been a surge in the success of discount retailers in the convenience goods sector, which have seen an increasing market share. It has recently been reported that Aldi plan to open a new store every week, responding to rapidly increasing sales growth as a result of opening new stores over the last year ([BBC, Sept 2019](#)). Both Aldi and Lidl have also expanded into smaller stores fit for high streets, with both businesses opening the first of their 'Local' format shops in London over the last year. These businesses are examples of data driven, digitally capabilities that has been key to growing retailers, with further businesses such as Flying Tiger Copenhagen and Joules tapping into data insight to drive value from 'bricks and mortar' retail (Retail Week, [The UK's top 30 growth retailers 2019](#)).
- 1.11 The reasons for visiting or being in town centres is changing, with people seeking experiences outside the traditional notion of shopping. These experiences range from personalised customer services, health and leisure services (e.g. beauty salons, gyms), to cultural consumption including a range of leisure, arts and music events and concerts . There has been growth of consumer spending on leisure experiences. A concept has developed that 'a high street has to be more than a street – it has to be the centre of things' with the idea of social interaction and social capital being central to successful town centres (Retail Week, [Retail Reimagined 2019](#)). This is backing to the diversity of uses beyond traditional A1 Shops that have seen growth in town centres.
- 1.12 Another point is that through the increasing intensification of development, residential populations within town centres are growing and will continue to do so. This is the case for Woking, where 44% of the Borough's additional new homes for the plan period are expected in the town centre, with an significantly increased population which will support a range of retail, restaurants, leisure, social and community uses. This will help to foster a vibrant, active place. As mentioned, the successful Housing Infrastructure Fund bid is expected to unlock the development potential of a number of sites across Woking Town Centre, through major transport infrastructure improvements, and enable a higher density of development than may have been expected. This is considered further in section 2 of this report.
- 1.13 Alongside the rise in town centre living, promoting employment and business, particularly in knowledge, hi-tech and high skilled sectors, is another element that helps to boost town centre vitality and growth (see Employment Floorspace Topic Paper, 2018). Centre for Cities have published research showing that successful city centres have less reliance on retail and greater proportions of office floorspace, particularly higher quality offices. This is linked to the success of these cities in attracting higher skilled businesses and jobs, with priority given to commercial office space and managing competition for it. The research shows significant links between successful office markets and the health of high streets ([Centre for Cities, 2019](#)).

- 1.14 Therefore the approach to promote town and city centres as a place to live and work, with a variety of consumer experiences on offer, is a well founded strategy to ensure a strong and vibrant town centre. This is encapsulated in the Council's Core Strategy and will be delivered through its implementation, in part delivered by the Site Allocations DPD.

Woking Town Centre Development and Trends

- 1.15 How the town centre has changed over the last decade is important to understanding the background to planning for retail and other town centre uses in the Site Allocations DPD. The Core Strategy retail requirement of 93,900 sq m (gross floorspace) is set on the basis of Woking town centre containing 80,000 sq m retail floorspace, making it the second largest shopping centre in Surrey after Guildford.
- 1.16 Woking Borough Council has taken active steps to maintain its own stock of retail (and offices) and took ownership of Wolsey Place Shopping Centre in 2010. It also owns the Peacocks Centre, and the two centres are managed jointly as Woking Shopping by Woking Town Centre Management Ltd. The Council taking ownership of the shopping centres and other retail floorspace, which accounts for 39% of all retail floorspace in the Borough, is part of a wider strategy to acquire land assets to facilitate redevelopment. The Council has entered into development agreements at particular sites to bring forward development.
- 1.17 The current retail context in Woking town centre is relatively strong. In the centre's primary frontages 67% units are in A1 use. This includes Woking Shopping (the Peacocks and Wolsey Place shopping centres), where the proportion of A1 units is slightly higher, at 71%. For the primary frontages overall, there has been a reduction from 71% A1 units since 2012, which is due to increasing numbers of other uses, particularly A3 uses, which stands at 12%, and is elaborated on further below.
- 1.18 An indicator of vitality is vacancy over the long term. Current vacancy in Woking's primary frontages stand at 9.6%, which is a fair amount higher than in 2015 (4.2%) but is almost unchanged in the longer term, with vacancy in 2012 at 9.2% and in 2009. It should be noted that town centre designations were slightly different prior to the Core Strategy's adoption, and the town centre boundary was consolidated in the Core Strategy. Given the level of change and development taking place in the centre, the fact that vacancy has not worsened over the last ten years is positive with regard to town centre vitality. The vacancy rate also suggests that there is a range of options and opportunities for retailers and other businesses looking to locate in the town.
- 1.19 Looking at secondary frontages (which fall within the designated primary shopping area), there is much greater diversity of uses, with only 23% A1 floorspace. A much higher proportion of units are in A2 use (20% compared to 7% in the primary frontages) and A3 use (18% compared to 12% in the primary frontages) with an array of other uses, including pubs, community uses and sui generis uses (each of these account for well below 10% of units in the secondary frontage). The 2011 Retail Monitoring Report notes that the focus for shopping had shifted away from the secondary shopping frontages since the opening of the Peacocks Centre in the early 1990s. This has perhaps led to greater diversification in the town centre, which may help the town centre's resilience in the face of a declining retail sector.

- 1.20 Vacancy in the secondary frontages is higher, standing at 13.6%, which is up from 10.3% in 2011. This should again be considered in relation to development in the town centre. Changes to roads along the Broadway and High Street associated with the Victoria Square development have had an impact on businesses. Outside the primary shopping area and the designated primary and secondary frontages there are various retail frontages and units (amounting to nearly 80 units) where vacancy rate is 12.7%.
- 1.21 Nationally, vacancy rates in town centres stand at 11.5% (MHCLG, 2019). Vacancy across Woking Town Centre is 11.9%, which is more or less in line with this figure (just 0.4% above). Despite some higher vacancy levels in the secondary frontages, which is due to major development taking place, the vitality of the centre in terms of vacancy is not considered to be a particular issue. However, this will continue to be monitored on a regular basis by the Council.
- 1.22 Key to the continuing vitality of the primary shopping frontages has been an approach led by the Council and shopping centre managers to create an attractive town centre environment through investment in the public realm. Jubilee Square, Commercial Way and Market Walk saw public realm improvements that completed between 2012 and 2014, and there is a rolling programme being implemented to cover other parts of the centre. Current plans and work being undertaken to improve the public realm include the area around the eastern end of Chertsey Road around Duke Street and Dukes Court, and at Church Street East. Albion Square, between Albion House and Woking station has this year seen major improvements that changes the arrival experience into Woking, and provides more positive, legible links from the station into the town centre.
- 1.23 As well as public realm improvements, wider investment in infrastructure has taken place, including the facilitation of multi-modal travel (a new bus stop, pedestrian and cycle-way improvements), improvements to the transport interchange at Woking station and new public art around the town centre. This has been carried out with the clear objective of making the town centre an attractive place to live, shop and work. It helps the town retain existing business and makes it attractive to new business.
- 1.24 The Council's flexible approach to town centre development (particularly change of use) has helped the Borough's centres respond to the changing retail market, as can be seen by the increasing restaurant offer in Woking town centre, in units that may have become available from previous retail uses and could have stood vacant. This has had the obvious benefits in ensuring use and activity in the centre, particularly along Commercial Way. There has also been an increase in health and beauty, and leisure related uses (within A uses, to D2 and sui generis use) to meet demand from growth sectors identified in paragraph 1.11.
- 1.25 The increase in restaurants has had a positive effect in terms of maintaining reasonable footfall and at Wolsey Place shopping centre, footfall increased by 8% from June 2012 to June 2019 (although it should be noted that footfall declined in the Peacocks Centre over the same period) creating a new purpose for town centre visits. This has presented the opportunity for linked trips for other retailers, businesses and the wider leisure and entertainment offer (cinema, theatre and the Big Apple). It may also have helped to cushion the impact of a tough retail market on the town centre.

- 1.26 The rise of the restaurant scene in Woking reflects the trend of increasing consumer spend on leisure experiences. The Town, District and Local Centres Study (2009) identified an expected increase of almost £133 million in restaurants, cafes and bars, by far the highest forecasted spending increase in the leisure sector. The Town, District and Local Centres Study 2009 also estimated that 'leakage' outside the study area was approximately 70% of expenditure in the category of restaurants/cafes and bars/clubs/pubs. It is expected that the increased number, variety and quality of restaurants and bars in Woking may have tapped into previously lost expenditure and 'clawed back' some of that spend from the surrounding area e.g. from Guildford.
- 1.27 At the point that Guildford Borough's Retail and Leisure Study Update was produced (in 2014) it identified that 48% of those surveyed who lived in Zone 3, the north eastern part of Guildford that adjoins Woking and includes areas such as Ripley and Send, chose eating and drinking venues in Woking. While the data from both Borough's studies shows natural leakage either way between Boroughs, recently development of restaurants and bars in Woking, together with developments such as Victoria Square (which includes a large increase in retail floorspace, anchored by Marks & Spencer) may help to attract a greater number of consumers from the surrounding areas, helping the Woking Town Centre compete more successfully.

2. Delivery of the Core Strategy retail requirement

2.1 This section looks at the extent to which the Core Strategy' retail requirement can be met, through the Council's Site Allocations DPD and development expected in the Core Strategy period. The Core Strategy requirement of 93,900 sq m additional floorspace (gross) is for A1 to A5 uses and covers the whole Borough. It is split up with specific requirements for the town centre, West Byfleet District Centre, Knaphill and other Local Centres, in policies CS2, CS3 and CS4. The requirement is further separated to distinguish A uses (A1-A5) overall and A1 shops only within each policy. Policy CS5: Priority Places* sets the Council's objectives for Priority Places, which does not set a quantitative requirement but seeks to increase the choice of retail offer in Sheerwater and supports in principle the development of a convenience retail outlet.

A breakdown of the Core Strategy's requirement is shown in the table below:

Table 1: Locations identified for retail growth in the Core Strategy

Location	Core Strategy requirement (sq m, gross)	
	A1-A5	A1
Woking Town Centre	75,300	67,600
West Byfleet District Centre	13,000	12,500
Knaphill Local Centre	3,000	2,400
Other Local Centres	3,200	2,600
Priority Places	As per CS5*	As per CS5*
Total (sq m)	94,500	85,100

2.2 Looking next at how retail and other A use floorspace in Woking town centre has changed due to development completions, monitoring figures for the period from April 2012 until March 2019 across the Borough show an increase (gross) of 21,095 sq m A use class (it should be noted the net increase is 7,091 sq m). Of this, 15,484 sq m is additional A1 Shops floorspace and 4,246 sq m A3 Restaurants and cafes. The largest single gain in floorspace is in the designated Priority Places, from the development of a new Asda superstore in Sheerwater (7,661 sq m gross/net A1 floorspace), as supported by Policy CS5 Priority Places. In terms of meeting the overall retail (A1-A5) requirement of 93,900 sq m, development completed across the Borough in this period accounts for 22.5% of the requirement.

2.3 In Woking town centre, the requirement for A1 retail is split into delivery periods in Policy CS2. These are as follows:

- 2012-2016 17,500 sq m A1 retail required;
- 2016-2021 26,200 sq m A1 retail required;
- 2021-2027 23,900 sq m A1 retail required.

Looking at these time periods, during 2012-2016 a total of 2,705 sq m (gross) A1 retail floorspace was completed, just 15.5% of the requirement for this period. It is difficult to report

for the second period (2016 to 2021) as we are just over half way through it, but delivery is expected to be boosted by the retail floorspace currently under construction at Victoria Square. This scheme is a key part of the Borough's future growth ambitions and includes 10,439 sq m gross A1 retail floorspace and 528 sq m A3 restaurants and cafes (ref PLAN/2014/0014). It should be noted that part of the Council's objective was to first improve existing retail stock in the shopping centres, in order to retain existing businesses and attract new ones. This is proving to be successful and continues to be monitored.

- 2.4 Examining the data from Woking town centre in greater depth, in the period since 2012 (1 April) to end March 2019 Restaurant (A3) floorspace has increased by 2,016 sq m (gross), which is largely due to completions of restaurants (from A1 and A2 uses) at 23-27 and 26 Commercial Way, in the Peacocks Centre (unit 42 and part of unit 41) and at what is now Cardinal Court and Olympian Heights, on Guildford Road. It should also be noted that in the town centre by far the greatest net loss has been of A2 Financial and Professional service floorspace (-1,216 sq m). While a small amount of this floorspace (-226 sq m A2) was on Commercial Way, this element converted into a restaurant, so was not lost from the overall A class use, which forms part of the Core Strategy requirement. The largest loss of A2 use (892 sq m) was at Sandringham, which situated well outside the primary shopping area in the south of the town centre on Guildford Road. This converted to a nursery and residential use, and would not be considered to negatively impact town centre vitality.
- 2.5 Looking around the Borough, retail surveys (Sept 2019) show that West Byfleet is performing relatively well, with 38% of units in retail use, and a range of financial and professional services (A2 uses) and restaurants, standing at 16.5% and 17.7% of units respectively. While there has been virtually no change to date to A use classes development completions in West Byfleet, major change is expected through the redevelopment of Sheer House. The preparation for this development has led to a temporarily high vacancy rate in West Byfleet, which stands at 19 units (or 24%) of West Byfleet centre at present. 15 of the vacant units are located in Sheer House. This is having a negative impact on the centre in short term, but disruption is expected to be temporary and it is noted that the centre still contains a good range of shops, services, restaurants, and a library (which continues to operate despite being on the ground floor of Sheer House). West Byfleet continues to fulfil its role as a district centre.
- 2.6 The redevelopment of Sheer House includes 5,000 sq m gross additional mixed retail uses (A1/A2/A3/A4/A5, equating to 1,800 sq m net gain due to the existing shops at the site) and a small addition to community use (gross 300 sq m/ net 110 sq m) as part of a large mixed use scheme, containing 255 flats. This is a large development, which once built out will account for 38% of the A1-A5 requirements for West Byfleet District centre for the plan period. During the preparation of the Core Strategy, the potential for a comprehensive redevelopment of West Byfleet Centre, to include Waitrose, was a realistic prospect. Since then, Waitrose have not continued to promote this redevelopment in the same way. The Council will continue to monitor the situation, and will have regard to the remaining requirement, accounting for the changed market, and the potential of allocated sites to provide retail and a array of services to meet the needs of the local population.
- 2.7 At Knaphill, the largest of the Borough's designated Local Centres, there was a small gain in retail (435 sq m gross additional A1 floorspace, which completed in 2014) as part of a mixed use development at 15 High Street, to accommodate a Tesco express on the ground floor and

12 flats over two floors above. Across the other local and neighbourhood centres there have been very modest changes to retail uses, which amounts to a gain in 234 sq m A1 retail, and indicate small changes which add to the range of uses that meet local need. This figure excludes the new superstore in Sheerwater, detailed in paragraph 2.2. However, these changes show low overall progress (11% delivery of the target set in policy CS4) towards the retail requirements for Knaphill and the Local Centres, as shown in Table 1.

Delivery of retail development going forward in the plan period

2.8 Table 2 below brings together overall delivery from development completions (as detailed above) so far in the plan period and the Council's commitments through planning permissions. The figures are sensitive to the fact that some site allocations include extant planning permissions, and figures relating to such development are included in the commitments (planning permissions) figure.

Table 2. Delivery of retail (A1-A5) uses

Delivery source	Retail floorspace (sq m, gross)	Proportion of Core Strategy retail requirement
Completions	21,095	22.5%
Commitments (planning permissions)	59,641	63.5%
Total	80,736	86.0%
Remaining floorspace to meet the Core Strategy requirement	13,164	14.0%

2.9 As can be seen in Table 2, the implementation of additional A1-A5 floorspace from development completions and commitments (planning permissions) so far in the plan period, at nearly a half way point, is healthy compared to the Core Strategy requirement. While completions may be lower than expected, the commitments figure is positive. Commitments include major development taking place and expected, including Victoria Square and Red Car Park & Toys R Us in Woking town centre, and Sheer House in West Byfleet. It should be noted that some of the largest net increases in floorspace are through mixed retail and leisure use permissions (both mixed A uses and mixed A/D2 permissions) and A3 restaurant uses, and show the market working to enable flexibility, which has been duly considered and approved through the development management process.

2.10 The Site Allocations DPD identifies eleven sites that are suitable for retail use (listed in Appendix 1) and are expected to deliver additional retail floorspace in line with the Council's objectives. In addition to the allocated sites, the Housing Infrastructure Fund (HIF) bid contains three sites that the Council anticipates would be suitable for retail use. The bid also substantially expands the area of Site Allocation UA13 (30-32 Goldsworth Road, Woking Railway and Athletic Club, Systems House and Bridge House). The expected intensification of

development at these sites will provide the opportunity and capacity needed to deliver additional to that included in the Site Allocations DPD.

- 2.11 Despite capacity being available and permissions being in place to deliver the Core Strategy's retail requirement, actual delivery (completions) going forward will need to be continuously monitored, particularly relating to larger site allocations and HIF sites in the town centre. While delivery of the retail (A1-A5) floorspace requirement was considered realistic at the examination and adoption of the Core Strategy (¹Hearing 1, Matter 1, paragraphs 19.11 and 24.2 of [WBC response to Inspector's Matters and Issues, Core Strategy examination, 2012](#)) the fluidity of the retail sector since then may attribute to lower than expected completions on the ground to date, as shown in Table 2 and paragraphs 2.2 to 2.27.
- 2.11 However, there is optimism in the positive commitments figures and expected delivery, paired with the availability of sites to deliver the remaining requirement. The actual additional floorspace for A1 to A5 uses, and any other uses, secured on any site will be influenced by market signals at the time that a planning application is submitted and determined. Given that the Core Strategy's plan period is until 2027, any assessment of market signals put forward with planning applications should take account of long term market trends.
- 2.12 It is unclear at present whether the retail market trends identified (in paragraphs 1.8-1.14) are temporary and whether consumer confidence will return once the country's political and economic situation stabilises, or continue on the path established over recent years. The latter may require re-adjustment in terms of development requirements. The outcome of monitoring will influence the future review of the requirement and of the Core Strategy as a whole. The plan, monitor and review approach that is embedded in the plan making process allows scope to review the requirement, when these matters become clearer. Whatever the outcome, the Site Allocations DPD seeks to set a framework for development that is appropriate, and flexible and responsive to a changing context.
- 2.13 Therefore, the Site Allocations DPD identification of eleven sites that are suitable for retail use (listed in Appendix 1) shows the continuing importance of retail in the Borough's centres, which is supported by Core Strategy policy. The DPD does not set expected quantities of retail floorspace within its policies, meaning that the Council can continue to take a flexible approach to delivery and respond to the market. This can be assessed on a case by case basis through the development management process, informed by evidence from applicants and from the Council's own development monitoring and knowledge. In this way, the Site Allocations DPD can respond to a dynamic retail sector, and take advantage of growth areas, such as restaurants and leisure uses.
- 2.14 The Council will be gathering evidence to inform a greater understanding of expanding sectors. This may focus around areas of growth that the Council is aware of, such as niche retail,

¹ The Town, District and Local Centres Study (2009, Table 9.5 and Appendix 11) looked into spatial proposals and identified a series of 'development opportunity sites' to bring forward new town centre floorspace. While detailed development appraisals were not carried out as part of the study, the level of retail and town centre floorspace requirements were considered by officers and the Council in development of the Site Allocations DPD.

personalised services and cultural consumption, including leisure, arts and music. On the ground, development in these areas would lead to a diversity of uses that enable social interaction and active use of an improved public realm (see paragraphs 1.10-1.13). While retaining retail in core shopping areas in the Borough's centres, such work may help the Council to understand what is needed to continue to promote a diversity of uses to achieve its objectives to create a flourishing, diverse and innovate economy, as outlined in Policy CS1: A Spatial strategy for Woking Borough. This may include promotion of a range of activities and uses that are suitable in town centre locations, that have a positive impact on the strength of the retail offer within its centres.

2.15 The Council is also aware of the need for the above uses to be carefully managed to create a successful town centre economy in the day, evening and (if supported by Council) night time, linked to increasing residential populations, growing businesses and 'peopling' of the town centre and West Byfleet. The Site Allocations DPD alongside the Core Strategy and the rest of the development plan provides a framework to enable delivery of a range of town centre uses, help the town, district and local centres adapt to their growing populations, and provide shops, services and businesses that cater to existing and changing customer preferences. In this respect, the Council is confident that the Site Allocations DPD will be able to fluidly respond to changing retail and other needs.

3. Concluding comment

3.1 This report has outlined the dynamic nature of the retail sector, resulting from economic and political change, since the adoption of the Core Strategy in 2012. Despite this, the report shows an overall positive picture with regard to the level of retail floorspace delivered and expected through development permissions, much of which has or is coming forward through major development. The Site Allocations DPD and the HIF sites contain the capacity needed to deliver the remaining retail requirement, which the Council will continue to monitor. The DPD does not set expected quantities of retail floorspace, which is intended to allow the Council to continue to take a flexible approach to delivery, which has proved successful so far, informed by up to date evidence and development monitoring. This will help the Council respond to the changing market.

Appendix 1: Site Allocations including retail use

Proposal Site reference	Site address	Ward	Allocated use(s)	Timing of delivery
UA4	1-12 High Street and 26-34 Commercial Way, Woking, GU21 6EN	Canalside	Residential including Affordable Housing, offices and retail	During the Plan period
UA6	2-24 Commercial Way and 13-28 High Street, Woking, GU21 6BW	Canalside	Residential including Affordable Housing, offices, retail	During the Plan period
UA9	113-129 Goldsworth Road, Woking, GU21 6LR	St Johns	Retail, offices, residential including Affordable Housing	During the Plan period
UA11	1-7 Victoria Way and 1-29 Goldsworth Road, Woking, GU21 6JZ	Canalside	Retail, offices, residential including Affordable Housing	During the Plan period
UA13	30-32 Goldsworth Road, Woking Railway and Athletic Club, Systems House and Bridge House, Goldsworth Road, Woking, GU21 6JT	Canalside	Residential, offices, retail	During the Plan period
UA15	The Big Apple American Amusements Ltd, H.G. Wells Conference Centre, the former Rat and Parrot PH and 48-58	Canalside	Community, leisure, retail, offices, residential including Affordable Housing	During the Plan period

	Chertsey Road, Woking, GU21 5AJ			
UA24	Sherpa House, Kingfield Road, Kingfield, GU22 9EH	Hoe Valley	Residential including Affordable Housing, retail	During the Plan period
UA25	Land within Sheerwater Priority Place, Albert Drive, Woking, GU21 5RE	Canalside	Residential including Affordable Housing, community uses, retail, open space and leisure facilities	During the Plan period
UA41	Car park to east of Enterprise House, Station Approach, West Byfleet, KT14 6NW or KT14 6PA	Byfleet and West Byfleet	Retail, residential including Affordable Housing	During the Plan period
UA42	Land at Station Approach, West Byfleet, KT14 6NG [includes Sheer House]	Byfleet and West Byfleet	Retail, community (library), offices, retail (Waitrose), residential including Affordable Housing	During the Plan period
UA44	Woking Football Club, Woking Gymnastic Club, Woking Snooker Club, Westfield Avenue, Woking, GU22 9AA	Hoe Valley	Football stadium and associated facilities, residential including affordable housing, and commercial retail	During the Plan period

Appendix 2: Housing Infrastructure Fund (HIF) sites expected to include retail use, that are not Site Allocations

- The Triangle
- Police Station/ Magistrates Court
- Former BHS site
- Goldsworth Road (the southern part of this site is Site Allocation UA13)

The location of these sites can be seen [here](#).

Note that Gateway 1 and 2 sites are covered by Site Allocations UA4 and UA6