

# Woking Borough Council TOWN, DISTRICT AND LOCAL CENTRES STUDY



**TYM & PARTNERS**  
Planners and Development Economists

Final Report  
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# 1 INTRODUCTION

## Terms of Reference

- 1.1 Woking Borough Council ('the Council') commissioned Roger Tym & Partners (RTP) to undertake a 'Town, District and Local Centres Study' ('the study') in March 2009, following a competitive tender process. The project brief ('the brief'), which is reproduced as **Appendix 1**, explains that the study is to form part of the evidence base for the retail and leisure policies and proposals in the emerging Local Development Framework (LDF). Thus, the study has to reflect the Government's requirements as set out in PPS6 and PPS12; these are discussed in Section 2 of this report. The study has a timeframe to 2026, although the assessments of quantitative need from 2021 to 2026 are essentially indicative.
- 1.2 Paragraph 1.0 of the brief explains the key requirements of the study, which we summarise as follows:
- Review the vitality and viability of the main town centre of Woking and the borough's district and local centres. Assess the need to plan for the expansion or contraction of the Borough's centres, including the identification of centres or areas within town centres in decline where change needs to be managed.
  - Assess whether there is a need for new floorspace for retail, leisure and other main town centre uses in Woking town centre and new floorspace for retail and leisure in the district and local centres, over the plan period to 2026 to maintain vitality and viability, and if so, the amount and type of floorspace required.
  - Identify any deficiencies in provision of main town centre uses and assess the capacity of existing town, district and local centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and / or town centre.
  - Confirm the appropriateness of or suggest amendments to the defined primary shopping area boundary and Local Plan / Core Strategy policies and define the town centre boundary for Woking town centre.
  - Confirm the appropriateness of or suggest amendments to the defined boundaries and Local Plan / Core Strategy policy for the District Centres and Local Centres.
  - Inform the preparation of policies for the hierarchy of the borough's centres within the sub-regional context, and strategies for developing and strengthening centres within the borough, for inclusion in the Local Development Framework.
  - Inform the development of a monitoring protocol to enable the Council to monitor and keep up to date indicators and information on the health and needs of town, district, and local centres for the Local Development Framework Annual Monitoring Report
  - Provide information to assist the Council in determining planning applications for additional floorspace for retail and other main town centre uses or the loss of existing floorspace.
- 1.3 Importantly, paragraph 2.0 of the brief requires the study to be consistent with PPS6 and any other relevant guidance and should be consistent with and have regard to sustainability, social inclusion, accessibility and transport.

- 1.4 Throughout this report, we use the word 'Woking' to refer only to the town of Woking and not to the Council or any borough-wide matter.

## Context

- 1.5 Paragraph 3.0 of the brief explains the specific issues which were to be borne in mind in undertaking this study. We now summarise our understanding of these issues and how they relate to this study.

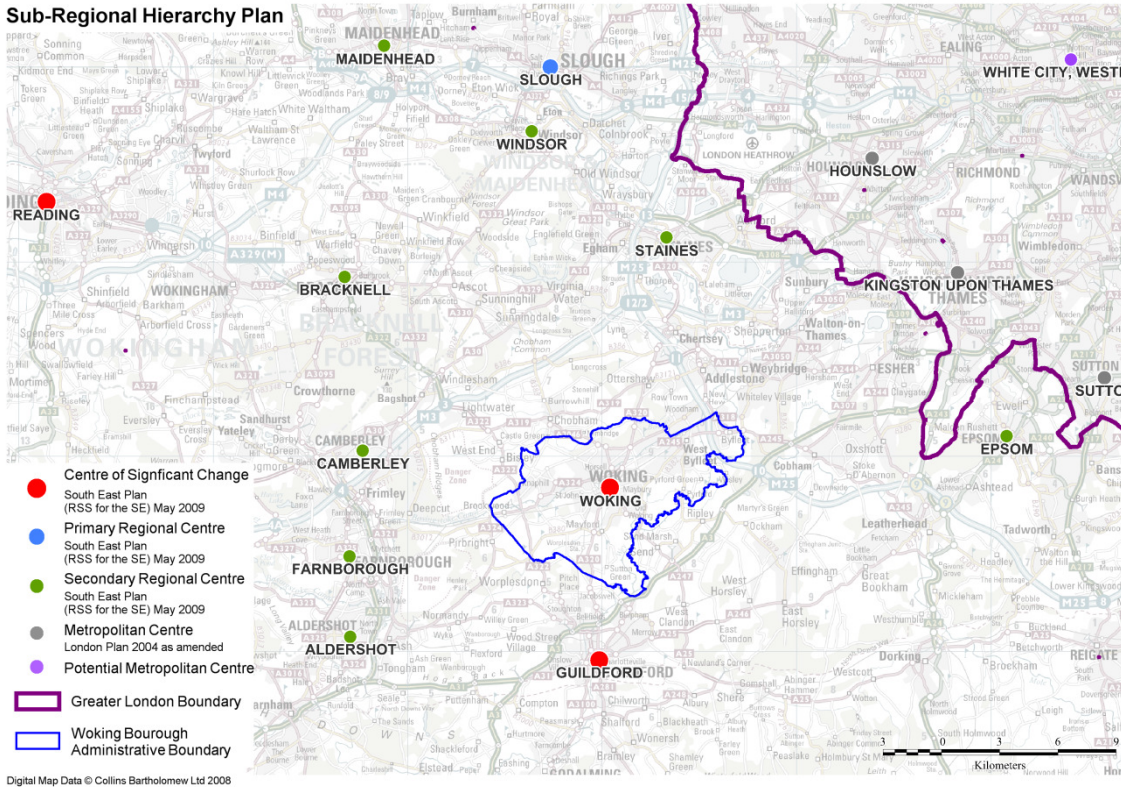
### *Previous Retail Study*

- 1.6 The previous retail study prepared for the Council was the Retail and Commercial Leisure Study (RCLS) undertaken in 2004 by DTZ Pinda Consulting (DTZ). This RCLS was undertaken in accordance with the previous PPG6 (1996) and formed part of the evidence base for the submission draft of the Council's Core Strategy (October 2006) which was subsequently withdrawn in 2007.
- 1.7 The RCLS promotes Woking as the priority for investment and development within the borough, so as to establish it as a premier destination for shopping and a wide range of other attractions and uses. The study acknowledges the strong competition that Woking faces from other centres within the South East and London and suggests Woking create a niche market to maintain its position in the existing hierarchy.
- 1.8 The RCLS also recommends that the Council promote new food stores and convenience goods within existing district centres rather than allow out of centre developments that harm the vitality and viability of these centres.
- 1.9 We have referred to the RCLS throughout the study for comparison purposes; i.e. we have used time series data to assess how the market share in Woking has changed since 2004.

### *Woking's Role within the South East of England*

- 1.10 Woking is identified within the recently approved South East Plan (SEP) as a 'Regional Hub' and as a 'Centre for Significant Change'. Its position within the sub-regional hierarchy is graphically presented at **Figure 1.1**.

Figure 1.1 Sub-Regional Hierarchy Plan



- 1.11 Woking’s designation as a regional hub means that the town should benefit from investment that will improve economic activity and regeneration, promote new major retail, employment and high density residential development, concentrate on improving transport infrastructure both within Woking and the links to other identified hubs.
- 1.12 Turning to Woking’s designation as Centre for Significant Change, the SEP explains that such centres are expected to undergo the most significant change across the range of town centre uses during the plan period. Thus proactive, integrated strategies for their development will be particularly important. Major retail developments and other town centre uses of a large scale are encouraged within such centres. Thus it is important that the need for further floorspace in Woking is understood and a vision is set out.
- 1.13 These two designations send a powerful message as to the future of Woking town centre and we understand that the Council has embraced the regional status of the town.

*Woking Borough’s Property Interests*

- 1.14 The Council has a number of property interests throughout the borough’s centres. We understand that the Council is prepared to adopt a proactive approach to utilising these sites to support the development of the centres.

### *Climate Change Strategy*

- 1.15 The Council's Climate Change Strategy (2008 - 2013) highlights the borough's committed effort to tackling climate change. It is estimated for the borough there were 604,000 tonnes of CO2 equivalent emissions in 2005. The Climate Change Strategy aims to reduce CO2 emissions year on year, using these figures as a baseline.
- 1.16 Planning is seen as key to tackling the issue of Climate Change. The Council is working to promote the 'environmental footprint' in connection with development and land use. It aims at producing lower, less harmful CO2 in a site's environmental footprint. The overall objective is that any new land use reduces CO2 emissions BY 80% compared to previous use. Four main elements of sustainable development which can be taken account of in the local planning system are:
- Location
  - Layout
  - Landscape
  - Sustainable Construction Measures
- 1.17 We understand that the Council plans to work within partnership with the community to set the standard to alleviate the effects of climate change and raise awareness to encourage a more sustainable future.

### *Cycle Woking*

- 1.18 After securing £1.82 million in June 2008 from Cycling England, the Council and Surrey County Council (SCC) have a significantly greater budget to spend on improving cycling facilities in the area. The top priorities for cycling in the borough are:
- To further improve the Woking Cycle network to make it even more cycle friendly.
  - To recruit personalised travel-planning advisers to help individuals get started on bicycles.
  - To improve cycle storage at the rail stations.
- 1.19 To increase the number of cycle journeys and cut the number of car journeys, the Cycling Woking Project is working with local businesses to set up travel plans to encourage sustainable ways of travel. Target groups have been identified to send key messages about cycling. Infrastructure improvements are also being carried out, providing more bike stands, improving facilities, etc.
- 1.20 Alongside Woking town centre, we understand that improvements are planned in Knaphill, West Byfleet and Byfleet in 2010/2011. If funding can be secured through development opportunities, then such projects can be brought forward.

### **Report Structure**

- 1.21 The remainder of our report is structured as follows:
- Section 2 provides a résumé of the requirements of **national and regional policies** in so far as they relate to town centres, the location of retail and leisure development and the test of soundness in the new PPS12.



- Section 3 provides our **qualitative analysis** of the current performance of Woking town centre, the seven existing district centres and role of the 16 existing local centres identified under Policy SHP1 of the Woking Local Plan. Specifically, we draw on the findings from our health checks assessments and the perceptions of consultees.
- Section 4 provides an assessment for the responses to the **visitor surveys** undertaken in Woking, West Byfleet and Knaphill.
- Section 5 provides our analysis of the current patterns of **retail and leisure spending**, drawing on the telephone survey of households.
- Section 6 presents the findings in relation to **retail need** within the borough.
- Section 7 presents the findings in relation to **leisure need** within the borough
- Section 8 looks at the provision and need for **other town centre uses**; i.e. offices and hotels.
- Section 9 presents the **strategic recommendations** for the borough.

1.22 The main report is accompanied by a separate volume of Appendices as follows:

- Appendix 1 Project Brief
- Appendix 2 Healthcheck Appendices
- Appendix 3 Records of Stakeholder Consultations
- Appendix 4 Smaller Centre Service Audit
- Appendix 5 Demand Survey
- Appendix 6 Visitor Survey
- Appendix 7 Household Survey Data
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## 2 NATIONAL AND REGIONAL POLICY

### Planning Policy Statement 6: Planning for Town Centre

2.1 The current national policy context, in so far as it relates to town centres and the location of new retail, office and leisure developments, is set in the main by PPS6 (2005). This is structured under four sections that deal with:

- the Government's objectives;
- the plan-led approach to positive planning for town centres;
- the assessment of proposed developments; and
- measuring and monitoring the vitality and viability of town centres.

2.2 In this section of our report, we focus on the Government's objectives and on the plan-led approach to positive planning for town centres. This in turn relates to the Council's Local Development Framework (LDF), the preparation of Local Development Documents (LDDs) and more specifically to Development Plan Documents (DPDs) such as the Core Strategy.

#### *The Government's Objectives*

2.3 The very first paragraph of PPS6 makes it clear that '*sustainable development is the core principle underpinning planning*' and that '*the planning system has a key role in facilitating and promoting sustainable and inclusive patterns of development, including the creation of vital and viable town centres*'. The Government's key objective for town centres, therefore, is to promote their vitality and viability (paragraph 1.3).

2.4 The Government's second tier objectives are set out in paragraph 1.4 of PPS6; these can be summarised as:

- enhancing consumer choice;
- supporting efficient, competitive and innovative retail and leisure sectors and improving their productivity; and
- improving accessibility to existing and new development by a choice of means of transport.

2.5 Paragraph 1.5 of PPS6 then sets out the Government's wider objectives; these can be summarised as:

- the promotion of social inclusion by ensuring access to a range of town centre uses and rectifying deficiencies;
- the regeneration of deprived areas;
- the promotion of economic growth;
- the delivery of more sustainable patterns of development; and
- the promotion of high quality and inclusive design, enhanced public realm and an accessible and safe environment.

2.6 Regional planning bodies (RPBs) and local authorities (LPAs) are therefore required to implement these Government objectives by planning positively for the growth and development of town centres, whilst not restricting competition or innovation (paragraphs

1.6 and 1.7). The main town centre uses to which PPS6 applies are retail, leisure and offices as well as arts, cultural and tourism facilities (paragraph 1.8). Housing is cited as '*...an important element in most mixed-use, multi-storey developments*' (paragraph 1.9).

### *Positive Planning for Town Centres: A Plan-led Approach*

2.7 The introduction to Section 2 of PPS6 states that '*in order to deliver the Government's objective of promoting vital and viable town centres, development should be focused in existing centres in order to strengthen and where appropriate, regenerate them*'. Thus, RPBs and LPAs are called upon to:

- actively promote growth and manage change in town centres;
- define a network and hierarchy of centres, each performing their appropriate role to meet the needs of their catchments; and
- adopt a proactive and plan-led approach to planning for town centres through regional and local planning.

2.8 To assist the Council, we consider it appropriate to summarise these requirements in a different and more logical order to that which is set out in PPS6 itself, starting with the role of regional plans.

### *The Role of Regional Plans*

2.9 Paragraphs 2.12 to 2.14 of PPS6 set out the requirements placed on RPBs in developing their Regional Spatial Strategies (RSSs). The over-riding requirement is for RPBs to set out a vision and strategy for the region's growth, particularly for higher level centres, and provide a strategic framework for planning at the local level. In particular, RPBs must:

- develop a strategic framework for the development of a network of centres, taking into account the need to avoid an over concentration of growth in the higher level centres;
- make strategic choices about those centres of regional and sub-regional significance where major growth should be encouraged;
- identify the need for new centres to be developed in areas of planned major growth;
- assess the need for additional floorspace in the comparison retail, leisure and office sectors over the lifetime of the RSS (and for five-yearly periods within it) and, having regard to capacity and accessibility considerations, they must identify where the identified needs would best be met;
- monitor and regularly review the implementation of the strategy; and
- identify the need for major town centre development of regional or sub-regional significance.

2.10 However, PPS6 is clear that new or expanded regional or sub-regional shopping centres located in out-of-centre locations are unlikely to meet the requirements of national policy (paragraph 2.14).

### *Networks and Hierarchies*

2.11 Paragraphs 2.9 to 2.11 of PPS6 provide further advice in relation to the development of the network and hierarchy of centres, but - in this part of the policy statement - the advice is in relation to both the regional and local levels. Thus, authorities must plan carefully

how to distribute any identified growth at both regional and local levels. In defining their spatial objectives, RPBs and LPAs:

*'...should consider whether there is a need to rebalance the network of centres to ensure that it is not overly dominated by the largest centres, that there is a more even distribution of town centre uses, and that people's everyday needs are met at the local level'* (paragraph 2.9).

2.12 Thus, in developing the network and hierarchy, RPBs and LPAs are required to consider:

- whether there is a need to avoid over concentration of growth in the higher level centres;
- the need for investment in those centres requiring to be regenerated; and
- the need to address deficiencies in the network (paragraph 2.9)

2.13 Of crucial importance is the PPS6 requirement that *'...any significant change in the role and function of centres, upward or downward, should come through the development plan process, rather than through planning applications'*, with higher order centres dealt with in the RSS and with lower order centres dealt with through the DPDs (paragraph 2.10).

#### *Promoting Growth and Managing Change*

2.14 Paragraphs 2.3 to 2.8 of PPS6 turn to the role of LPAs in promoting growth and managing change in town centres. Paragraph 2.3 states that LPAs should, within the regional planning context, actively plan for growth and the management of change in town centres over the period of their DPDs by:

- selecting appropriate existing centres to accommodate growth, making the best use of existing land and buildings, but extending the centres where appropriate;
- managing the role of existing centres through the promotion of specialist activities, or specific types of uses; and
- planning for new centres of an appropriate scale in areas of significant growth, or where there are deficiencies in the existing network.

2.15 Paragraph 2.4 urges that growth should be accommodated, wherever possible, through *"...more efficient use of land and buildings within existing centres"*. Where growth cannot be accommodated within existing centres, paragraph 2.5 advises LPAs to plan for:

- the extension of the primary shopping area, if there is a need for additional retail provision; and
- the extension of the town centre, to accommodate other main town centre uses.

2.16 Where existing centres are in decline, PPS6 advises LPAs to *'...assess the scope for consolidating and strengthening these centres by seeking to focus a wider range of uses there, promote the diversification of uses and improve the environment'* (paragraph 2.8). However, where a reversal of decline is not possible, LPAs are advised to consider a reclassification of the centre, so as to reflect its revised status in the hierarchy.

#### *The Role of Plans at the Local Level*

2.17 Paragraphs 2.15 to 2.18 of PPS6 deal with the role of the forward planning system at the local level. We note, in particular, the provisions of paragraph 2.15 which require LPAs to

adopt a positive and proactive approach to planning for the future of all types of centres within their areas. Thus, in line with the RSS and their community strategies, LPAs should prepare a core strategy DPD which sets out '*...a spatial vision and strategy for the network and hierarchy of centres, including local centres, within their area, setting out how the role of different centres will contribute to the overall spatial vision for their area*'.

2.18 Paragraph 2.16 of PPS 6 urges LPAs to work with stakeholders and the community so as to:

- assess the need for new floorspace for retail, leisure and other town centre uses, taking account of both quantitative and qualitative considerations;
- identify deficiencies in existing provision, assess the capacity of existing centres to accommodate new development and identify centres in decline where change needs to be managed;
- identify the centres where development will be focused, as well as the need for any new centres of local importance;
- define the extent of the primary shopping area and the town centre on their Proposals Map;
- identify and allocate sites in accordance with the considerations set out in paragraphs 2.28 to 2.51;
- review existing land use allocations;
- promote investment in deprived areas by identifying opportunities for growth and improved access;
- set out criteria based policies for assessing proposals on sites not allocated in DPDs; and
- distinguish between primary and secondary frontages.

2.19 Paragraphs 2.19 to 2.22 of PPS6 then proceed to highlight the need for high quality and inclusive design, the importance of accessibility and safety and the need for efficient use of land through the promotion of higher-density mixed-use development. Paragraphs 2.23 and 2.26 deal with the management of the evening economy and the need for a range of leisure, cultural and tourism activities and paragraph 2.27 seeks to promote the retention and enhancement of existing markets and, where appropriate, the creation of new ones.

#### *Site Selection and Land Assembly*

2.20 As part of the forward planning process, paragraphs 2.28 to 2.52 of PPS6 address site selection and land assembly. Paragraph 2.28 sets out the five key considerations for local authorities when they are selecting sites for development; these are to:

- *'assess the need for development;*
- *identify the appropriate scale of development;*
- *apply the sequential approach to site selection;*
- *assess the impact of development on existing centres; and*
- *ensure that locations are accessible and well serviced by a choice of means of transport*'.

2.21 These considerations match the development control tests set out in paragraph 3.4 of PPS6. In applying them in the development plan preparation process, LPAs are required

to work closely with retailers, leisure operators, developers, other stakeholders and the wider community. Paragraph 2.31 makes it clear that LPAs may need to make choices between competing development pressures in their town centres.

#### *Need for Development*

- 2.22 Paragraph 2.32 of PPS6 states that need assessments should be carried out as part of the plan preparation and review process, that they should be updated regularly and that LPAs should take account of the regional spatial strategy. Indeed, the LPAs' assessments of need '*...should inform and be informed by the regional needs assessments and form part of the evidence base for development plan documents*'.
- 2.23 LPAs should place greater weight on quantitative need for specific types of retail and leisure developments taking into account population change, forecast change in expenditure for specific classes of goods and forecast improvements in productivity in the use of existing floorspace.
- 2.24 Nevertheless, an important qualitative consideration will be the need to improve the range of services and facilities in deprived areas (paragraph 2.35). Another consideration which may be taken into account in the assessment of qualitative need is the degree to which existing shops may be over-trading (paragraph 2.36). However, regeneration and employment impacts - whilst capable of being material considerations - are not indicators of retail need (paragraph 2.37).

#### *Appropriate Scale*

- 2.25 Paragraph 2.41 states that '*In selecting suitable sites for development, local planning authorities should ensure that the scale of opportunities identified are directly related to the role and function of the centre and its catchment*'.
- 2.26 As a consequence, paragraph 2.42 states that '*...local centres will generally be inappropriate locations for large scale new development...*' and that LPAs '*...should therefore consider setting an indicative upper limit for the scale of developments likely to be permissible in different types of centres...*'. If a need is identified for larger format developments, paragraph 2.43 indicates that sites should be identified within or on the edge of 'city centres' and 'town centres', as defined in Table 1 of Annex A to PPS6.

#### *Sequential Approach to Site Selection*

- 2.27 Paragraph 2.44 of PPS6 sets the order of preference in applying the sequential approach, as follows:
- first, locations within existing centres, but subject to caveats relating to suitability, availability and scale in relation to the function of the centre;
  - second, edge-of-centre locations, with a preference given to sites that are, or will be, well connected to the centre; and then
  - out-of-centre sites, with preference given to sites which are, or will be, well served by a choice of means of transport and those with a high likelihood of forming links with the centre.
- 2.28 It is important to note that the distance threshold for the purposes of the 'edge-of-centre' definition, varies from up to 300 metres from the primary shopping area for retail use, to

within 300 metres of a town centre boundary for all other main town centre uses (as set out in Table 2 of Annex A of PPS6). It is also noteworthy that LPAs are required to give weight to those locations that best serve the needs of deprived areas when considering alternative sites at the same level in the sequential ranking (paragraph 2.44).

- 2.29 There is a requirement for flexibility and realism on the part of both LPAs and developers/operators when discussing the identification of sites for inclusion in DPDs. Sites must be available, or likely to become available for development during the DPD period, and capable of accommodating a range of business models, all parties having been flexible in relation to scale, format, car parking provision and the scope for disaggregation (paragraph 2.45).
- 2.30 DPDs should also include phasing policies so as to ensure that preferred locations are developed ahead of less central locations (paragraph 2.46).

#### *Assess Impact*

- 2.31 If LPAs are proposing to allocate sites in 'edge-of-centre' or 'out-of-centre' locations, they must assess the potential impact on centres within the catchment area of the potential development (paragraph 2.48). LPAs must also assess the potential impact on other centres of those allocations within a centre which would substantially increase its attraction vis-à-vis other centres (paragraph 2.48).

#### *Ensure Locations are Accessible*

- 2.32 Paragraph 2.49 of PPS6 confirms PPG13's aspiration to reduce the need to travel, to reduce reliance on the private car and to ensure that everyone has good access to a range of facilities. As a consequence, in selecting sites for allocation, LPAs are required to have regard to accessibility by a choice of means of transport and the potential impact of development on car use, traffic and congestion.

#### *Other Relevant Matters*

- 2.33 After assessing the sites against the five considerations set out in paragraph 2.28 of PPS6, LPAs are able to consider other matters such as physical regeneration, the likely net employment impact, the potential impact on economic growth and the potential impact on social inclusion (paragraph 2.51).

#### *Assembling Sites*

- 2.34 Paragraph 2.52 states that LPAs '*...should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan documents...*' (our emphasis). LPAs are also required to consider the scope for site assembly using their compulsory purchase powers in order to ensure that suitable sites are brought forward for development.

#### *Designation of New Centres*

- 2.35 Paragraph 2.53 repeats the advice that '*new centres should be designated through the plan-making process where the need for them has been established, such as in areas of significant growth, or where there are deficiencies in the existing network of centres, with priority given to deprived areas.... Whether this is done at the regional or local level will*



*depend on the size of the proposed centre and its proposed role in the hierarchy of existing centres...'. PPS6 is clear, however, that existing out-of-centre facilities must not be regarded as 'centres', unless they are identified as such in the RSS and/or in DPDs (paragraph 2.54).*

#### *Providing for Local Shopping and Other Services*

- 2.36 Paragraphs 2.55 to 2.59 of PPS6 are concerned with the provision for local shopping and other services. There is emphasis on the need for a network of local centres, so as to meet people's day-to-day needs and provide a focus for local services. LPAs are encouraged to seek to rectify any deficiencies in local provision, especially in deprived areas, through liaison with the local community, retail operators and other stakeholders.

#### *Conclusions in Relation to PPS6*

- 2.37 In our assessment, the provisions of PPS6 reflect the Government's wider emphasis on the need to plan, monitor and manage town centre uses at both the regional and local planning levels. If there is a need for retail provision and this growth cannot be accommodated within existing centres, then LPAs are to plan for the extension of the primary shopping area and/or for the extension of the town centre as a whole to accommodate other main town centre uses.
- 2.38 The five key considerations to apply in selecting sites for development are similar, whether in forward planning or in development control. Importantly LPAs are to consider setting indicative upper limits for the scale of development likely to be permissible within or on the edge of different types of centres.

## **PPS12 : Local Spatial Planning**

- 2.39 This study will form part of the evidence base upon which the Council will draw in developing its LDF and, in particular, its Core Strategy DPD. PPS12 (2008) introduces a new test of '*soundness*', as follows:

To be '**sound**' a core strategy should be justified, effective and consistent with national policy.

'**Justified**' means that the document must be:

- *founded on a robust and credible evidence base*
- *the most appropriate strategy when considered against the reasonable alternatives.*

'**Effective**' means that the document must be:

- *deliverable*
- *flexible*
- *able to be monitored'*

Thus, the PPS12 places emphasis on the need for DPDs to:

*'...demonstrate that the plan is the most appropriate, when considered against reasonable alternatives' (paragraph 4.38 of PPS12, our emphasis); and*

*"...show how the vision, objectives and strategy for the area will be delivered and by whom, and when' (paragraph 4.45 of PPS12, our emphasis).*

## Potential Changes to National Policy

### *Draft Planning Policy Statement 4: Planning for Prosperous Economies*

- 2.40 Draft PPS4 was published in May 2009 with the consultation period finishing in July 2009. The revised PPS4 aims to streamline existing policies in PPG4 and PPS6. It encourages positive and proactive planning for sustainable economic growth in urban and rural centres and promotes investment, competition and innovation.
- 2.41 The major objectives of draft PPS4 are:
- Promote sustainable economic growth
  - Deliver sustainable patterns of development
  - Promote high quality and inclusive design
  - Improve accessibility
  - Promote the vitality and viability of town centres
  - Promote social inclusion
- 2.42 In its final form, this statement should be taken into account by LPAs and RPBs in preparation of their LDFs and RSSs. It also emphasises the need for delivering sustainable development.
- 2.43 In relation to planning for town centres at the local level, the draft statement requires that local planning authorities create evidence based policies that:
- Assess the need for additional floorspace and the capacity of existing centres to accommodate such need;
  - Assess quantitative need for development taking account of existing and forecast population, forecast expenditure and forecast improvements in particularly the use of floorspace.
  - Assess qualitative need for development, assessing appropriate distribution of locations, choice for the community and retail mix.
- 2.44 LPAs are also required to:
- Define a hierarchy of centres;
  - Promote areas in need of regeneration;
  - Appropriately manage centres in decline;
  - Have flexible policies able to adapt to changing economic circumstances;
  - Encourage high density mixed use development;
  - Recognise the important role of smaller shops.
- 2.45 The objectives for town centres only differ slightly from existing policy guidance in PPS6 with the major difference being the weight given to economic, social and environmental benefits for development proposals that do not necessarily have a positive impact upon town centres.
- 2.46 Furthermore, when assessing the need for additional retail and leisure development opportunities local planning authorities need to take account of both quantitative need for additional floorspace for different types of retail and leisure development, as well as any qualitative considerations. In deprived areas which lack access to a range of services and facilities, and where there will be clear and demonstrable benefits in identifying sites for

appropriate development to serve communities in these areas, additional weight should be given to meeting these qualitative considerations.

## Good Practice Guidance

- 2.47 A 'living draft' Good Practice Guide (GPG) on Need, Impact and Sequential Approach was published in April 2009 by CLG alongside the draft PPS4. The GPG explains that it supports the implementation of national policy, but does not set out new policy. The main objectives of the Practice Guidance are:
- To promote development in town centres.
  - To provide advice on preparing need and impact assessments and assist in determining planning applications.
  - To illustrate how sequential approach can be applied.
  - To encourage a greater degree of consistency and transparency to assist in preparation of need and impact assessments.
- 2.48 The GPG states that consideration of need, sequential site assessments and impact assessments should be undertaken regionally to inform the RSS and locally to prepare the LDF.
- 2.49 In terms of local assessment for the LDF, it should have regard to the relevant RSS. The assessment should:
- Provide assessment of retail and town centre uses
  - Provide understanding of inter-relationships between different town centres
  - Identify retail need and requirement for 'main town centre uses'
  - Inform the development of policy options and potential sites for future development
  - Provide robust economic capacity forecasts.
- 2.50 The Guide recognises the importance of identifying need, both quantitative and qualitative. According to the draft PPS they have a role to play in reaching a judgment about the scale and form of development which should be planned for through development plans.
- 2.51 Throughout this study we have taken into account the principles set out in the GPG.

### *Competition Commission's Investigation of the UK Grocery Market*

- 2.52 The Competition Commission published the findings of its investigation of the UK grocery market in April 2008. The Commission's key recommendations are that:
- 'The Department of Communities and Local Government (CLG) should take such steps as are necessary to make the Office of Fair Trading (OFT) a statutory consultee for all applications for grocery stores in excess of 1,000 sqm sales area (including applications for extensions which would cause the post-implementation sales area to exceed 1,000 sqm).'*
- 2.53 The OFT should provide advice to the LPA on whether a particular retailer has passed or failed a 'competition test'. A grocery retailer would fail the test if:
- it was not a new entrant to the local area (defined by a ten minute drive time); and

- the total number of facias in the local area were three or fewer; and
  - the retailer would have 60 per cent or more of the groceries sales area in the local area.
- 2.54 CLG should take such steps as are necessary to ensure that LPA's take account of the OFT's advice on the result of the competition test and that LPAs may only determine planning applications in a manner inconsistent with that advice where they are satisfied that:
- *'the particular development would produce identified benefits for the local area that would clearly outweigh the detriment to local people from the area becoming or remaining highly concentrated in terms of grocery retailing; and*
  - *the development, or any similar development, would not take place without the involvement of a large grocery retailer that had failed the competition test.'*
- 2.55 Nevertheless, the Competition Commission makes it clear that:
- it does not envisage the competition test being a replacement for the need test (paragraph 11.134 of the CC report);
  - its remedies are additional to the reforms mooted in the Planning White Paper and *'...do not preclude any of the reforms proposed in the Planning White Paper in any way'* (paragraph 11.135 of the CC Report); but that
  - LPAs should *'...take greater account of competition in their development plans'* (paragraph 11.135 of the CC report).
- 2.56 However, Tesco asked for a judicial review over the test drawn up by the Competition Commission. The appeal was overruled in March 2009 by the Competition Appeal Tribunal (CAT). Mr Justice Barling, Head of The CAT, explained *'The CC failed properly to consider certain matters which were relevant to its recommendation that the competition test be imposed. None of the matters in question could be dismissed as incapable of affecting the commission's recommendation.'*
- 2.57 As things stand, there is no competition test *per se* within Government guidance. However, the principles of competition are important and are already recognised within PPS6 and PPS4. Thus in preparing this study, we have carefully considered how competition can be improved within the borough.

## South East England Regional Spatial Strategy

- 2.58 The Government issued the final version of the South East England Regional Spatial Strategy (RSS), 'the South East Plan' (SEP), in May 2009. This sets out regional tier of planning policy and is an important consideration for the Council when preparing its DPDs.
- 2.59 TableSP1 identifies 22 regional hubs, including Woking. These regional hubs are given investment areas to concentrate on as follows:
- A focus for investment in multi-modal transport infrastructure both within and between hubs, supported by initiatives to re-balance travel patterns through behavioural change;

- A focus for other new infrastructure, including health, education, social and green infrastructure, and public services;
  - A focus for new investment in economic activity and regeneration, including skills and training investment;
  - A focus for new market and affordable housing, to support the creation of higher density 'living centres';
  - A focus for new major retail and employment development.
- 2.60 Woking has been recognised within these regional hubs as a Centre for Significant Change within Policy TC2: New Development and Redevelopment in Town Centres. As Centre for Significant Change, Woking is described as:
- 'Important centre of economic activity. Some interaction with activities and facilities available at Guildford. Key interchange on rail network between intra-regional and local rail services. Direct coach link with Heathrow Airport. Well related to the strategic road network.'*
- 2.61 Other Centres for Significant Change include Guildford, Crawley and Reading. The Centres for Significant Change are expected to *'undergo the most significant change across a range of town centre uses during the plan period and proactive, integrated strategies for their development will be particularly important.'*
- 2.62 Policy SP3 of the RSS states that *'the prime focus for development within the South East should be in urban areas, in order to foster accessibility to employment, housing, retail and other services, and avoid necessary travel.'* Local planning authorities should devise policies to:
- Concentrate development within or adjacent to the region's urban area
  - Seek to achieve at least 60% of all new development across the South East on previously developed land and through conversions of existing buildings
  - Ensure that developments in and around urban areas, including urban infill/intensification and new urban extensions are well designed and consistent with the principals of urban renaissance and sustainable development
  - Use strategic land availability assessments to identify the scope for redevelopment and intensification of urban areas, seeking opportunities for intensification around strategic transport hubs and interchanges.
- 2.63 Chapter 13 of the RSS considers town centres, policies within it refer to all types of town centre development, business accommodation, residential, leisure, arts, culture, tourism and retail. The importance of the policies within this chapter is to create a balance between, and bring growth to the middle and lower order centres. Emphasis is placed on new investment and regeneration to accommodate new growth.
- 2.64 Policy TC2 of the RSS is significant for town centres within South East England. It seeks to encourage development and redevelopment of town centres, focusing development not only on major centres but also smaller deprived areas. Within this policy it gives guidance to local authorities and stakeholders for preparing plans and strategies, as follows:
- The need to support the function and viability of pre-eminent town centres to accommodate change and growth within each sub-regional strategy area

- The need to assess the capacity to accommodate change and growth in such areas
- The need to respect the historic character, environment and cultural value of existing town centres
- The need to ensure safe, secure and attractive environments for people to live, shop and work
- The need to promote new investment of an appropriate scale, in particular in vulnerable centres in need of regeneration
- The potential impact on the vitality and viability of town centres.

## Implications of National and Regional Policy

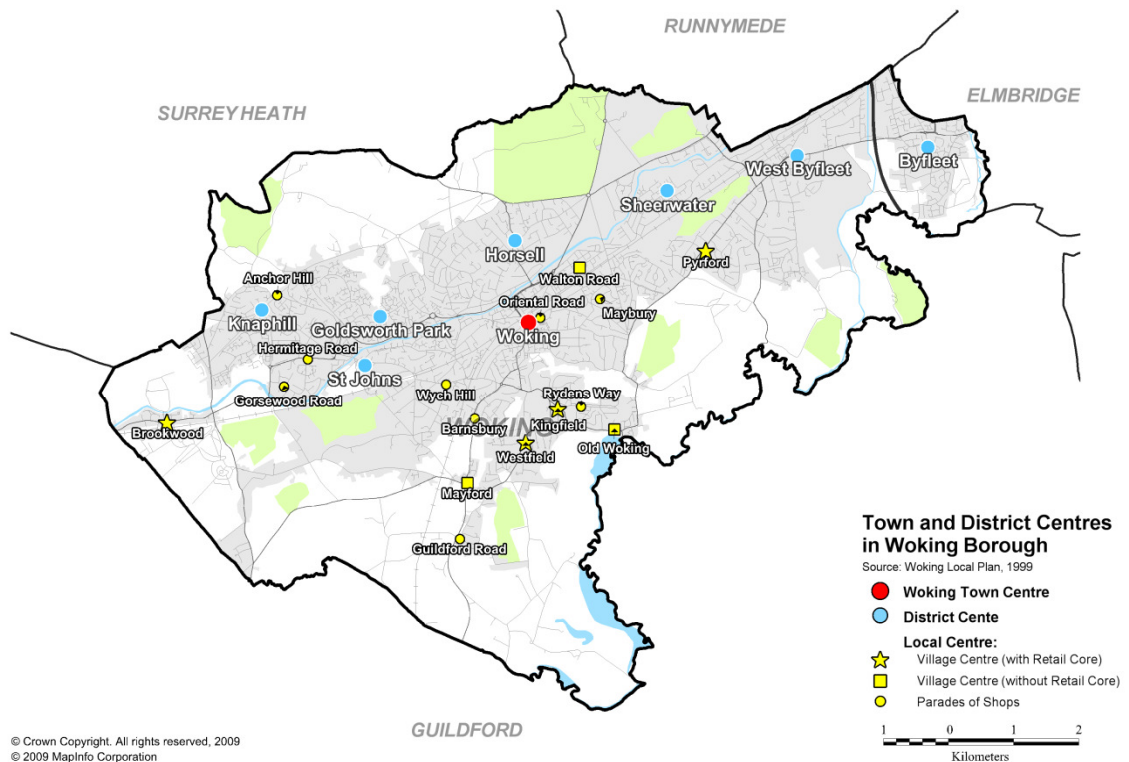
- 2.65 The requirements of PPS6 need to be considered when producing the LDF for the Council, the importance of having a plan-led approach to planning for town centres through local and regional planning and the importance of accommodating development within the town centre.
- 2.66 An important task for the borough's LDF will be to consider the policies within the RSS and concentrate investment within the given areas. Particular consideration should be given to the town centre policies for development within Woking town centre, recognising that it is a Centre for Significant Change and a Regional Hub where all town centre uses should be improved and where development concentrated.

## 3 VITALITY AND VIABILITY OF CENTRES IN WOKING BOROUGH

### Introduction

- 3.1 Our analysis of the performance of Woking town centre and the seven district centres (as designated in the 1999 Woking Borough Local Plan) has involved an appraisal of each centre in relation to the key indicators of vitality and viability as identified in Section 4 of PPS6.
- 3.2 The appraisal of each centre has involved:
- On-foot surveys.
  - Desk top research, so as to benchmark the study centres against a range of comparator centres.
  - Consultation with key stakeholders, including representatives of business, property and retail/leisure operators.
- 3.3 In the remainder of this section we provide an analysis of each centre. We used ten indicators of vitality and viability. These closely reflect the advice given in Section 4 of PPS6. They are explained in **Appendix 2** alongside some of key technical data we have referred to in our assessments. Our approach to stakeholder consultation is explained in **Appendix 3**.
- 3.4 Importantly, although we have visited Woking and all the existing district centres, we have undertaken more detailed assessments for Woking, West Byfleet and Knaphill. The reason for this is that these are acknowledged as the largest centres in the borough and have a greater bearing on the present and future retail/leisure draw of the borough.
- 3.5 A services audit of the 16 local centres designated in the 1999 Woking Borough Local Plan has also been undertaken. This assesses the level of services of each centre and the results are attached at **Appendix 4**.
- 3.6 To assist our assessments of vitality and viability and also our assessments of qualitative need, we have assessed retail and leisure demand within the borough via a postal survey. Our approach to the demand survey and the results are included at **Appendix 5**.
- 3.7 The existing hierarchy of centres (as defined by the 1999 Woking Borough Local Plan) is graphically presented at **Figure 3.1** below.

Figure 3.1 Existing Hierarchy of Centres



## Woking Town Centre

### Retail Rankings

- 3.8 Appendix 2.2 includes data on retail rankings according to the Management Horizons Europe Shopping Index 2009 ('MHE Index') identifies the change in Woking town centre's national ranking since 1998. Woking's position has improved from 115 in 1998 to 94 in 2008. Woking's rank did decline in the late 1990's/ early 2000's but has improved since 2003. This is likely to be due to the opening of the Debenhams department store which replaced Alders in 2005. In comparison to other centres in the sub-region, Guildford is ranked at 24 and Camberley is ranked at 149.

### Diversity of Uses

- 3.9 To compare each centre against the GOAD national average we have used the same breakdown as used by GOAD. However, GOAD exclude a number of uses from their diversity of use breakdown and subsequently, the national average is not available for all town centre uses. We have provided a breakdown of other ground floor space within the town centres in the second half of the table below. The uses listed in first section of the table are comparable with the GOAD national averages.



**Table 3.1 Diversity of Uses for Woking**

Use Class	Units	Floorspace (sqm)	Floorspace (%)	UK Average Floorspace (%)
RETAIL Floorspace as defined by Experian				
A1 Convenience <sup>(1)</sup>	27	10,390	10	17
A1 Comparison	150	66,950	62	50
A1 Services	65	7,010	6	5
A2 Financial & Professional Services	50	9,070	8	7
A3 & A5 Restaurants and cafes and hot food takeaways	68	10,860	10	10
Miscellaneous <sup>(2)</sup>	9	980	1	1
Vacant	17	3,610	3	10
<b>Sub-Total Experian RETAIL</b>	<b>386</b>	<b>108,870</b>	<b>100</b>	<b>100</b>
OTHER ground floor commercial floorspace in existing town centre				
A4 Drinking Establishments	16	5,260	-	-
C1 Hotels	2	1,220	-	-
B1 Business	32	28,180	-	-
D1 Non-Residential Institutions	7	4,150	-	-
D2 Assembly and Leisure	12	5,730	-	-
Vacant Units	37	16,430	-	-
Sui Generis	4	450	-	-
<b>Sub-Total Other Uses</b>	<b>110</b>	<b>61,420</b>	<b>-</b>	<b>-</b>
<b>GRAND TOTAL</b>	<b>496</b>	<b>170,290</b>	<b>-</b>	<b>-</b>

(1) Includes WM Morrison, Woking

(2) Incorporating employment agencies, post offices and tourist information

- 3.10 The comparison goods sector accounts for 62% of the retail and service floorspace in Woking town centre, as might be expected of a centre of this size. Convenience goods floorspace provision accounts for 10% of the total floorspace. This is 7% below the national average of 17%. Convenience floorspace within Woking comprises the Wm Morrison superstore which is on the edge of the town centre, the small Sainsbury's within Wosley Place and, the M&S food adjoining the railway station. The town centre also has a range of bakers and confectioners/newsagents.
- 3.11 The proportion of service sector floorspace in Woking is largely in line the UK average of 5% for such uses, accounting for 6% of the town centres floorspace. Woking is equal to the UK average of 10% for A3 and A5 floorspace represented in the 'restaurants, fast food and takeaways category.
- 3.12 Woking town centre benefits from a range of key leisure attractions, including the Big Apple Centre (including a bowling alley and lazerquest), the Ambassadors Cinema and the New Victoria/Rhoda Mcgraw Theatre.

### *National Multiples and High Profile Retailers*

- 3.13 There are a number of multiple retailers operating within Woking town centre. The one department store is operated by Debenhams. Woking has a wide range of comparison retail multiples, particularly in the lower and middle market sectors; these multiples include: Clarks, Burton, TopMan and TopShop, Accessorize, Dorothy Perkins, Evans, La Senza, New Look, Millets, Primark, Republic, River Island, Monsoon, TK Maxx, Clinton Cards, Next, JD Sports, Waterstones, WH Smith, HMV, Boots, Ernst and Jones, Poundland, Toys 'R' Us', The Body Shop and Faith.
- 3.14 However, Woking has very few 'high-profile' fashion multiples. Indeed, the 'Fashion Count' in the MHE Index indicates that 60.7% of Woking's 'fashion' retailers can be described as 'middle' order, 9.5% are 'lower-middle', 9.5% represent 'value' fashion, whilst only 1.2% can be categorised as 'upper-middle' fashion outlets. Thus, Woking attains a 'middle' rating for fashion in MHE's Index.
- 3.15 Woking would clearly benefit from the addition of further upper-middle and higher-end fashion retailers. This would bolster the quality and variety of the town centre's shopping offer and enable the town to better compete with Guildford (which is ranked as a 'middle' order centre but has a higher proportion of 'upper-middle' operators) and Kingston (which is ranked as 'upper middle').
- 3.16 Woking town centre has reasonable representation from national convenience multiples, including Morrisons and Sainsbury's supermarkets, however, the Sainsbury's is small compared to the out of centre Sainsbury's at Brookwood and the Morrisons performs an 'edge of centre function'. The town centre also contains Budgens, Holland & Barrett, Marks & Spencer Simply Food and a Thorntons store.

### *Operator Demand*

- 3.17 The FOCUS database (referred to in Appendix 2) shows that there are currently requirements in Woking from 30 operators including Animal, Tile Depot, Borders and Ann Summers.
- 3.18 We contacted the agents acting for the 30 retail operators that appear on the current FOCUS list, with a view to establishing their actual level of interest in Woking as an investment location. We received a response from 14 agents, but only two could confirm actual operator requirements for Woking (Animal and Tile Depot). A further three operators stated they would normally have a requirement for Woking but due to the current economic recession are not expanding their portfolio at this time.
- 3.19 We also contacted a further 35 retailers that are currently operating in both Guildford and Kingston but are not represented in Woking as well as the major food retailers. We received a total of 17 responses. Two expressed a current interest in Woking (Lidl and Ann Summers) and a further five responses by saying that the current recession is preventing them from opening further outlets at this time. Importantly, Lidl expressed an interest in Woking, West Byfleet or Knaphill.

- 3.20 The current economic climate has an impact upon the outcome of this study specifically in relation to operator demand. Demand is currently low but, as the economic climate improves over time so will demand and this should be acknowledged.
- 3.21 In addition, demand is often generated when there is a large new development that can provide modern facilities and large units.

#### *Retail Property Offer*

- 3.22 The retail property offer in Woking largely consists of modern units within the Peacocks centre and Wolsey Place which effectively represent the core retail area. There are also more dated units in the older areas of the town centre; e.g. Goldsworth Road and Chertsey Road.

#### *Retail Yields*

- 3.23 Figure 2.2.2 of **Appendix 2.2** confirms that the prime yields in Woking improved (i.e. lowered) from 6.25% in January 2005 to 6% in July 2008. Guildford and Camberley have also improved their yield by 0.25% since 2006 to 4.25% and 6% respectively. Guildford has improved most significantly at 15% from 2000 to 2008, whilst Woking is in line with Camberley at 8% change, thus all centres have improved in terms of retail yields over the period October 2000 to July 2008. The improvement in Woking's yields is likely to be due in part to the opening of Debenhams in 2005 and the general buoyant economy in recent years. We expect yields to have marginally increased (worsened) since the onset of the recession which will not have manifested itself in published data yet.

#### *Changes in Prime Zone A Shopping Rents*

- 3.24 Zone A shopping rents within Woking averaged £1,346 per sqm in June 2007, in line with the Zone A rents in Camberley (£1,292), but considerably below the Zone A rents being achieved in Guildford, at £2,583 per sqm.
- 3.25 Over the last decade the rate of Zone A rental growth has been fastest in Woking town centre (38% growth) when compared to Guildford and Camberley. Camberley town centre has experienced the second highest growth (26%), and Guildford and Kingston have experienced the lowest growth in rents at 19%.

#### *Proportion of Vacant Street Level Property*

- 3.26 There were 17 vacant retail units in Woking town centre at the time the healthcheck was undertaken in April 2009. This equates to a vacancy floorspace rate of 3.3% and is very significantly below the UK average vacancy rate of 10%.
- 3.27 The former Woolworths store in the Peacocks Centre is 1,408sqm in size and is the largest vacant retail unit in the centre. The former Marks & Spencer's unit represents 1,130 sqm (net). Other vacant retail units range from 50 sqm, to 240 sqm and are located throughout the centre with 10 in the Peacocks Centre and three in Wolsey Place.
- 3.28 In general, the available retail units in Woking are largely characterised by small and medium-sized units. Indeed, the average size of the 17 vacant units is only 212 sqm gross, which translates into an 'average' net sales area of approximately 159 sqm

assuming a typical gross to net ratio of 75%. We have recently been advised that the Dorothy Perkins store in Wosley Place will be closing in September 2009.

### *Accessibility*

#### *Public Transport*

3.29 Woking is served by a mainline railway station on the South Western Main Line and has frequent services to:

- Guildford
- London Waterloo
- Portsmouth
- Winchester
- Bournemouth
- Poole
- Southampton
- Salisbury
- Exeter
- Alton

3.30 Woking is also served by bus routes, which are outlined in detail in Table 3.2 below.

**Table 3.2 Bus Services to and from Woking**

<b>Route</b>	<b>Service Provider</b>	<b>Frequency*</b>
Woking to Guildford	Arriva	Hourly
Camberley to Woking to Guildford	Arriva	Every 20 minutes
Woking to Pirbright	Arriva	Every 10 minutes
Woking to Weybridge	Arriva	Every 30 minutes
Woking to Farnborough	Countyliner	Hourly
Woking to Old Woking	Countyliner	Hourly
Woking to Maybury Estate	Countyliner	8 daily
Woking to Barnsbury Estate	Countyliner	Every 30 minutes
Woking to Guildford	Countyliner	Hourly
Woking to Chobham	Carolone Buses	3 daily
Woking to Heathrow	National Express	Every 30 minutes
Woking to Hermitage Estate	Ride Pegasus	Daily
Woking to Send	Ride Pegasus	Daily
Woking to Farnham	Stagecoach	Daily
Woking to Staines	Travel Surrey	Every 30 minutes
Woking to Kingston	Travel Surrey	Hourly
Woking to Byfleet	Travel Surrey	Hourly

\*Services Monday to Saturday

3.31 Woking is thus well connected by public transport to the surrounding towns as well as to central London.

#### *Private Transport*

- 3.32 The A3210, A247 and A324 provide the main access routes into Woking town centre. The A320 links Woking with Guildford in the south and London and the M25 motorway in the north-east. The A247 provides access to Old Woking, Send and East Guildford to the south east and the A342 provides access to St John's, Knaphill and destinations further west. There are six car parks within the centre, presented at Table 3.3.

**Table 3.3 Car parks in Woking Town Centre**

<b>Car Parks</b>	<b>Spaces</b>
Blue (Shoppers) multi-storey car park	860
Brewery Road car park	221
Heathside Crescent multi-storey car park	496
Red (Shoppers) multi-storey car park	851
Victoria Way multi-storey car park	932
Yellow (Shoppers) multi-storey car park	565
Total	3,925

### *Safety and Crime*

- 3.33 Crime figures are available for Woking published by the Surrey Police Force. The average number of crimes within Woking have increased from 487 in July 2008 to 580 in July 2009 at a higher rate than the Surrey force overall. However, in comparison to other 43 forces within the England and Wales, Surrey performs relatively well.
- 3.34 In 2007/2008 Surrey recorded the second lowest number of total notifiable offences per 1,000 of the population of the 43 Forces across England and Wales. There was a reduction of 7.1% of crimes recorded in Surrey in 2007/2008 compared to 2006/2007. Surrey recorded the 15th lowest in terms of burglary, 11th lowest number for robbery offences and, third lowest for number of Most Serious Violence against the person offences. Overall, the number of crimes in Woking has worsened in all these categories over the same period.
- 3.35 CCTV is in operation within Woking town centre, and the centre is well lit with street lighting. There were no obvious signs of graffiti or other criminal damage within the centre.

### *State of Town Centre Environmental Quality*

- 3.36 Woking town centre is relatively modern in comparison to its major competing centres of Kingston and Guildford. A large proportion of the centre is pedestrianised, well-maintained, and pedestrian-friendly. Goldsworth Road has benefited in past years from recent development and the opening of new restaurants i.e. Zizzi's proves that it is becoming a more attractive area of the centre. Our stakeholder consultations revealed that restaurant operators would rather occupy units in Goldsworth Road than Chertsey Road.
- 3.37 However, given the large size of the town centre, it is inevitable that the quality of the environment is inconsistent. In particular the passageway between the Peacocks Centre and the main square is uninviting and poorly lit.

- 3.38 There are several areas that are characterised by poorly-maintained buildings. The area to the east of the town centre at the Junction Church Street and East Chertsey Road is of particular poor state. This represents a development opportunity and has the potential to provide an attractive gateway into the primary shopping area.

## West Byfleet

### *Retail Rankings*

- 3.39 According to the MHE Index, in 2008 West Byfleet was ranked 1,716 and has fallen 448 places since the 2003-2004 Index, when West Byfleet was ranked 1,268. West Byfleet is considered a local centre with a middle ranking market position. Importantly, it is the second largest centre in the borough.

### *Diversity of Uses*

- 3.40 West Byfleet has a reasonable choice of convenience retail offer; there is a Waitrose store, Costcutter, a butchers, and a Tesco Express at the Esso Petrol Station. There are few independent convenience retailers in West Byfleet, with an absence of greengrocers and off-licenses. It should be noted that a second butchers shop opened in August 2009, following our survey. West Byfleet could benefit from a discount food retailer locating within the centre, as Waitrose provides a more upmarket convenience offer.
- 3.41 The comparison retail offer within the centre is reasonable, ranging from book shops, florists, charity shops, a furniture store and a music shop. However, there is a significant lack of clothing shops, with the only providers being the charity shop and ladies wear boutique.
- 3.42 West Byfleet has a good range of services within the centre. There are numerous restaurants, takeaways and cafes. There are four hairdressers, an optician, a library, numerous banks, a sports injury centre, a travel agent, four estate agents, a chemist, and a modern health centre.
- 3.43 Overall West Byfleet has a wide range of uses within the centre.

**Table 3.4 Diversity of Uses for West Byfleet**

Use Class	Units	Floorspace (sqm)	Floorspace (%)	UK Average Floorspace (%)
RETAIL Floorspace as defined by Experian				
A1 Convenience	6	2,330	21	17
A1 Comparison	18	2,530	22	50
A1 Services	14	1,360	12	5
A2 Financial & Professional Services	10	1,700	15	7
A3 & A5 Restaurants and cafes and hot food takeaways	19	2,370	21	10
Miscellaneous <sup>(1)</sup>	0	0	0	1
Vacant	4	1,050	9	10
<b>Sub-Total Experian RETAIL</b>	<b>71</b>	<b>11,340</b>	<b>100</b>	<b>100</b>
OTHER Ground Floor Commercial Floorspace in existing centre				
A4 Drinking Establishments	1	460	-	-
B1 Business	4	1,010	-	-
D1 Non-Residential Institutions	3	2,360	-	-
Vacant Units	14	3,780	-	-
Sui Generis	2	1,090	-	-
<b>Sub-Total Other Uses</b>	<b>24</b>	<b>8,700</b>	<b>-</b>	<b>-</b>
<b>GRAND TOTAL</b>	<b>95</b>	<b>20,040</b>	<b>-</b>	<b>-</b>

(1) incorporating employment agencies, post offices and tourist information

### *National Multiples and High Profile Retailers*

- 3.44 West Byfleet has a limited range of both national convenience and comparison retailers. Convenience national retailers within the centre include Waitrose, Tesco (forecourt of Esso petrol filling station) and Costcutters. The comparison national retailers present within West Byfleet are Boots and Lloyds Pharmacy. Other national operators are Subway and Thomas Cook. Many of the stores and services within West Byfleet are independent traders and service providers.

### *Operator Demand*

- 3.45 According to Focus there is currently very low demand for premises in West Byfleet. Retailers that are looking for premises are British Heart Foundation 50 - 100 sq m, Superdrug Stores Plc 150 - 550 sq m and Costa Coffee 100 sq m. This low demand is not surprising considering the vacancy level for West Byfleet is 9% (see Table 3.4).
- 3.46 The demand survey highlighted that McDonalds are keen to locate within West Byfleet however, the type of site required must be suitable for one of their 'drive-thru' restaurants which is a fairly large requirement for a central location. Lidl also has a requirement for West Byfleet along with Woking and Knaphill.

*Retail Property Offer*

3.47 The majority of retail and service uses are accommodated in traditional frontage with residential on upper floors, particularly along Old Woking Road and a number of the buildings along Station Approach. Also within the centre is a purpose built supermarket (Waitrose) which is dominant.

*Retail Yields*

3.48 Published time-series data on retail yields are not available for West Byfleet.

*Changes in Prime Zone A Shopping Rents*

3.49 Published time-series rental data are also not available for West Byfleet.

*Proportion of Vacant Street Level Property*

3.50 There were four vacant retail units in West Byfleet at the time of our on-foot survey in April 2009; this equates to a retail vacancy rate of 9% which is very similar to the national retail vacancy rate of 10%. There is no pattern as to where the vacancies are located, they are dispersed throughout the centre. All of the vacant units range in size, from the smallest at 80 sq m to the largest at 450 sq m being the former Woolworths store.

*Accessibility*

*Public Transport*

3.51 West Byfleet is served by a mainline railway station, located on Station Approach. Trains operate to London Waterloo, Surbiton, Guildford and Portsmouth with various stops along the way. Trains depart at regular intervals, approximately every 20 minutes. The centre is served by bus routes, which are outlined in detail in Table 3.5.

**Table 3.5 Bus Routes from West Byfleet**

Route	Frequency
West Byfleet to St Peter’s Hospital	Every hour, Monday - Friday
West Byfleet to Brooklands	Twice daily, Monday - Saturday
West Byfleet to St Johns	Twice daily, Monday, Wednesday, Friday
West Byfleet to Staines	Every 30 minutes, Monday - Saturday
West Byfleet to Woking	Every 30 minutes, Monday - Saturday
West Byfleet to Chertsey	Every 30 minutes, Monday - Saturday
West Byfleet to Staines	Every 30 minutes, Monday - Saturday
West Byfleet to Kingston	Every hour, Monday - Saturday
West Byfleet to Pyrford	Twice daily, school days only

3.52 West Byfleet is well connected to the surrounding towns as well as central London with both trains and buses providing accessibility.

*Private Transport*

3.53 The A245, B367, B382 provides access into the centre. The A245 links West Byfleet with Byfleet in the east and Sheerwater in the west. The B367 provides access to Ripley to the



south east and the B382 provides access to Woking to the south of West Byfleet. There are three car parks within the centre (more details on parking).

### *Safety and Crime*

- 3.54 CCTV is in operation within West Byfleet and the centre is well lit with street lighting. There were no signs of graffiti or other criminal damage within the centre.

### *Environmental Quality*

- 3.55 West Byfleet is a reasonably attractive centre throughout. However, it is lacking in street furniture and open space, and the centre could benefit from seating and some green spaces to enhance the centre. The comparatively high numbers of vacancies also detract from the centre and portray a negative image. Furthermore, we are aware of some negative press over the future and general appearance of Sheer House. West Byfleet was not congested with traffic at the time of the visit however, regular traffic runs through the main shopping area.

## **Knaphill**

### *Retail Rankings*

- 3.56 According to MHE Index, in 2008 Knaphill was ranked 1,018. This is an increase of 176 places since the 2003-2004 Index, when Knaphill was ranked at 1,194. According to MHE Knaphill is considered to be a minor district location grade with a middle ranking market position.

### *Diversity of Uses*

- 3.57 Knaphill has a limited retail offer in both convenience and comparison stores as it is a small centre. In regards to the convenience offer, Knaphill only has one small Co-operative supermarket (262 sq m net). Other convenience retail provision includes a newsagents, bakers and a shop within a petrol station. Similarly, comparison retail is limited to a florist, a pharmacy, charity shops, a hardware store and a furniture store.
- 3.58 There are a total of 23 A1 and A2 units within Knaphill. The centre also has a range of restaurants, cafes, takeaways and, two public houses all providing a good offer for visitors.

**Table 3.6 Diversity of Uses for Knaphill**

Use Class	Units	Floorspace (sqm)	Floorspace (%)	UK Average Floorspace (%)
RETAIL Floorspace as defined by Experian				
A1 Convenience	5	892	15	17
A1 Comparison	16	2,237	37	50
A1 Services	11	682	11	5
A2 Financial & Professional Services	13	1,333	22	7
A3 & A5 Restaurants and cafes and hot food takeaways	13	849	14	10
Miscellaneous <sup>(1)</sup>	1	118	2	1
Vacant	0	0	0	10
Sub-Total Experian RETAIL	59	6,111	100	100
OTHER Ground Floor Commercial Floorspace in existing centre				
A4 Drinking Establishments	2	435	-	-
D1 Non-Residential Institutions	1	326	-	-
Vacant Units	2	318	-	-
Sub-Total Other Uses	4	753	-	-
GRAND TOTAL	63	6,864	-	-

(1) incorporating employment agencies, post offices and tourist information

### *National Multiples and High Profile Retailers*

- 3.59 Knaphill does not have many national multiples within the centre. The few that are present are Lloyds bank, HSBC, Barclays, Domino's Pizza, Boots, Co-Op and Coral. The majority of the units within the centre are independent retailers and service providers. Our stakeholder consultation revealed the high number of independents was an attractive feature of the town.

### *Operator Demand*

- 3.60 There have been no figures published by FOCUS for Knaphill on operator demand. However our research revealed Lidl has a requirement for Knaphill, alongside with Woking and West Byfleet.

### *Retail Property Offer*

- 3.61 The majority of the retail and service uses are accommodated in traditional high street buildings, particularly along Broadway and High Street. Along the High Street there is a stand alone petrol filling station with a small convenience shop. Some elements of the property offer within the centre are dated and would benefit from modernisation.

### *Retail Yields*

- 3.62 Published time-series data on retail yields is not available for Knaphill.

### *Changes in Prime Zone A Shopping Rents*

- 3.63 Published time-series rental data is not available for Knaphill.

### *Proportion of Vacant Street Level Property*

- 3.64 There were only two vacant units in Knaphill at the time of our on-foot survey in April 2009. This equates to a vacancy level of 2% which is well below the national average of 18.9%. Both of these units are reasonably small, the largest one being 119 sqm, and both located on the High Street.

### *Accessibility*

#### *Public Transport*

- 3.65 Knaphill is served by numerous buses which connect the centre to Woking, Guildford, Brookland and Chobham. Knaphill does not have a train station.

#### *Private Transport*

- 3.66 Knaphill is situated with the A324 to the east which runs towards Woking and the A322 to the west which runs towards Bisley. There is a car park within the centre and some on-street parking. Importantly, parking in Knaphill is free of charge.

### *Safety and Crime*

- 3.67 There is CCTV in Knaphill which contributes to the safe atmosphere in the centre. There were no signs of graffiti or any other criminal damage in the centre.

### *Environmental Quality*

- 3.68 During the visit to Knaphill there was some evidence of litter and at the centres periphery we observed areas of poor appearance. However the centre does have wide pavements, public seating and trees on the pavements, which could be further enhanced to improved its atmosphere.
- 3.69 Regular traffic runs through the main shopping area of Knaphill however, there was no congestion at the time of the visit. There are number of crossings for pedestrians.

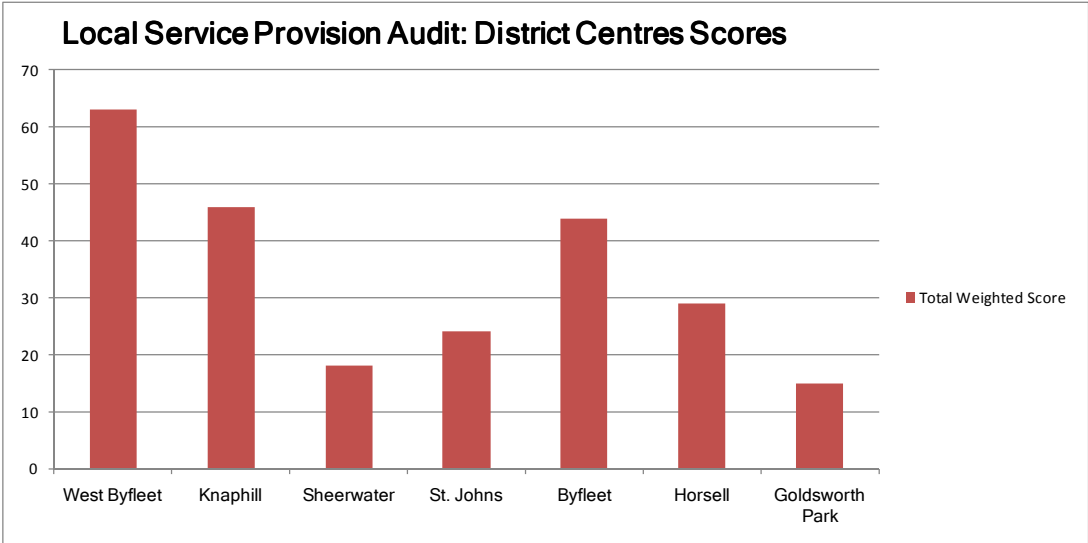
### *Summary of the Performance of Knaphill*

- 3.70 Knaphill is a reasonable sized centre with a range of shops and services. It has a pleasant, safe environment with a low vacancy rate and has a convenient offer for visitors. We consider that it fulfils the role of a local centre due to the range of services provided.

## **District Centres in Woking Local Plan**

- 3.71 As part of our assessment of the performance of the district and local centres, we have undertaken a service audit of the district and local centres currently designated in the 1999 Local Plan. Appendix 4 includes the detailed tabulations. This element of our assessment assists us in determining where in the hierarchy each centre falls, having regard to the guidance in Table 1, Annex A of PPS6.

**Figure 3.2 RTP Local Service Provision Audit for Existing District Centres**



- 3.72 Importantly, the audit weights the services that we deem to have more importance, namely superstores/supermarkets, banks, chemists and post offices. The footnotes to the tabulations in Appendix 4 provide more details on the approach. As is evident from the above Figure 3.2, West Byfleet has the highest performance and combined with the outputs from our healthcheck assessments, we consider that West Byfleet should be designated as district centres since it fulfils the criteria in PPS6.
- 3.73 Knaphill has a similar performance to Byfleet and does not offer the level of services that are provided by West Byfleet and does not have a railway station. We therefore consider Knaphill should be designated as a local centre based upon the services it provides, our healthcheck assessment and the criteria in PPS6.
- 3.74 Appendix 4 includes tabulations on a total weighted score (Tables A and C) and a total count score (Tables B and D). The total count score effectively only gives a score of 1 for each service (i.e. even if there are five banks, the bank service will only score 1) and enables the Council to make a comparison. However, for the purposes of our appraisal of the service performance, we focus on the total weighted score.
- 3.75 As well as West Byfleet and Knaphill, we have visited the other district centres as designated in the Woking Local Plan. Importantly, these centres have fewer services, a point which is revealed by Figure 3.1, but they do play an important function in the hierarchy of centres. Therefore, we have paid careful attention to their role in the hierarchy.

***Byfleet***

- 3.76 Byfleet is a reasonably large centre located 6.5 km north east of Woking. Housing is integrated with the retail offer, which results in a dispersion of the retail units within the centre. The convenience shopping offer is limited to a small Co-op store (128 sqm net), a butcher and a newsagent. Other shops and services offered include a florist, post office, a dentist, restaurants and takeaways, betting office, hairdressers and a beauty salon.
- 3.77 Byfleet has a pleasant environment with attractive shop frontages. However, there are three vacant units within the centre.

- 3.78 Byfleet has both on and off street parking and benefits from wide pavements. However, we observed a general lack of street furniture, which can often contribute to the centres attractiveness.
- 3.79 According to our audit of services, in Figure 3.1, Byfleet has a total weighted score of 44 for the local service provision audit, which is slightly below Knaphill. We therefore, consider it fulfils the role of a local centre rather than a district centre.

### *Goldsworth Park*

- 3.80 Goldsworth Park is located 4 km to the west of Woking. It is a collection of units, dominated by a Waitrose store and was built in the 1980s to support the large Goldsworth Park housing estate. There are 9 units within the centre and in addition to Waitrose there is a chemist, a public house and a petrol filling station. A former estate agency has closed resulting in one vacant unit.
- 3.81 Goldsworth Park is a pleasant, clean centre with a large area of parking. There is a small play area within the centre, which contributes to its community role.
- 3.82 Importantly, we understand there have been proposals to expand Goldsworth Park in order to widen its comparison shopping offer. However, these have been resisted by the Council and as things stand we understand the centre will continue its role as a small centre with a localised function.
- 3.83 Goldsworth Park received the lowest weighted score (15) of the existing district centres due to its limited service offer. Although it benefits from a supermarket, we do not consider that it fulfils the role of a district centre in light of lack of service provision within the centre.

### *Horsell*

- 3.84 Horsell is located some 2 km directly north of Woking. The centre is linear with retail and services on both sides of the road. Horsell has a convenience and comparison offer comprising a Co-op store (690 sqm net) double glazing company, a popular butchers, a bakery, a Spar (including post office), a newsagent, a charity shop and a gift shop, five restaurants and four hairdressers.
- 3.85 Horsell is a pleasant and clean area, including street furniture and open space. There are three vacant units within Horsell.
- 3.86 At the time of visit the centre was busy with the services well used. There is both on street and off street parking. The environment is generally pleasant, although the parking arrangement in front of the Co-op is a clumsy arrangement and would benefit from improvement. In addition, we note that some of the shopping parades have a dated design and could benefit from modernisation.
- 3.87 Horsell performs a primarily local function with a range of services and therefore we consider it fulfils the role of a local centre, rather than a district centre.

### *St Johns*

- 3.88 St Johns is located 4 km west of Woking. It has an attractive setting with a Basingstoke Canal running through and ample green spaces. Off street parking is provided within the centre to the rear of St Johns Road.
- 3.89 There is a limited amount of convenience and comparison retail although it is adequate to meet local shopping needs. As part of the retail offer there is one small Co-op foodstore (211 sqm net), a pharmacy and a bakery. There are two hairdressers, two health and beauty salons and three restaurants and three takeaways.
- 3.90 There are four vacant units within the centre.
- 3.91 We consider St Johns performs the role of a local centre, rather than a district centre.

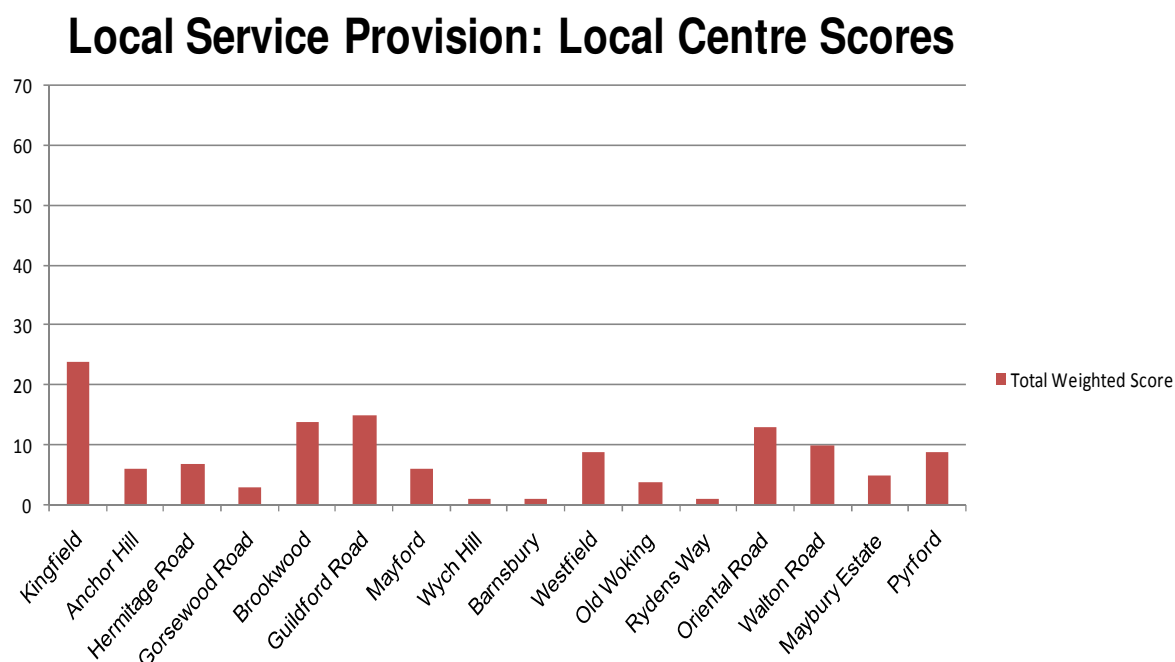
### *Sheerwater*

- 3.92 Sheerwater is a single aspect linear centre and it is located 4 km to the north east of Woking. There is a limited range of comparison and convenience stores within the centre. There are two small convenience stores Londis and Best One which could be used for local 'top-up' shopping.
- 3.93 We consider that the shop frontages would benefit from improvements. There are four vacant units and we consider that the centre would benefit from public realm improvements. The area has on-street parking and wide pavements, which assist with accessibility.
- 3.94 We consider Sheerwater performs the role of a local centre, rather than a district centre.

## Local Centres in Woking Local Plan

- 3.95 There are 16 Local Centres in Woking Local Plan. As with the district centres, we have undertaken an audit of the service provision, which is represented in **Figure 3.3**.

Figure 3.3 Local Service Provision Audit : District Centre



- 3.96 The centre with the highest local provision is Kingfield and due to its score, we also visited this centre. Kingfield is located to the south west of Woking and has a total of 29 units. Of these units seven are vacant. Five of these units are at Kingfield House and could be occupied separately or as one.
- 3.97 The convenience and comparison offer within Kingfield is limited. There is one supermarket (Sainsbury's Local), numerous takeaways, three hair dressers, a chemist, an off license, a post office and a butchers. The centre has a pleasant environment with open spaces but lacks street furniture. There is both free on and off street parking. Therefore, we consider that Kingfield fulfils the role of a local centre.
- 3.98 The other existing local centres have a much more limited service role. Although they are important service facilities, we do not consider the range of services provided fulfil the role of a local centre, defined in PPS6 as typically including, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy.

### Competing Centres

- 3.99 We are aware that a number of other centres beyond the borough, at the same or a lower level than Woking in the RSS and the Greater London town centre hierarchies, have either been expanded since the DTZ study of 2004 or have proposals in the pipeline for significant expansion. These are set out on Table 3.7 below.
- 3.100 In a number of centres there is either a real commitment to a new development or a policy aspiration for future growth, which will be realised during the plan period to 2026. These schemes, both individually and cumulatively, will erode Woking's market share if Woking stands still.

**Table 3.7 Town Centre Designations and Rankings**

<b>Town Centre</b>	<b>Designation in Regional Spatial Strategy/London Plan</b>	<b>Management Horizon Europe Ranking 2008</b>	<b>Management Horizon Europe Function 2008</b>
Guildford	Primary Regional Centre and Growth Area	24	Major regional
Camberley	Secondary Regional Centre	149	Sub-regional
Kingston	Metropolitan Centre	15	Major regional
Bracknell	Secondary Regional Centre	180	Sub regional
Aldershot	Secondary Regional Centre	305	Major district
Farnborough	Secondary Regional Centre	132	Sub-regional

Source: Regional Spatial Strategy, London Plan and MHE Index (2008)

### *Guildford*

- 3.101 Guildford is also designated as a Centre for Significant Change in the SEP. Guildford benefits from a The Friary and includes a House of Fraser and a Debenhams as anchor department stores. Guildford is a popular shopping destination within the sub-region and benefits from a historical charm not offered by centres such as Woking. Importantly we note that planning permission has been granted for an extension to the Friary Centre of 25,000 sqm and Westfield are currently in the process of acquiring the necessary land in order to build the development but, we understand that the scheme will need to be reconfigured and there is no likelihood of the permission being implemented in the near future.

### *Camberley*

- 3.102 Camberley is designated as a Secondary Regional Centre in the SEP. A new 22,600 sqm (gross) shopping centre, 'The Atrium', opened as part of a 3 hectare development in November 2008. This is a mixed use shopping and leisure development and includes retail units, restaurants, bowling and a cinema together with some 217 flats. Furthermore, there are pipeline plans for Camberley to expand further in Surrey Heath's Area Action Plan (AAP) Preferred Option Paper, which envisages that Camberley market share increasing and an addition 41,350 sqm (net) of comparison floorspace by 2021. If a development of this scale proceeds, there will be a real risk to Woking's market share.

### *Kingston*

- 3.103 Kingston is designated as a Metropolitan Centre within the London Plan and thus is at a similar position in the shopping hierarchy as Woking and Guildford in the South East. Within the adopted Kingston AAP, there is a policy commitment to 70,000 sq m retail led mixed use redevelopment in the Eden Quarter. We understand that a procurement process has commenced to secure a new developer since the deal with Hammersons was terminated. Thus the future of this scheme is uncertain in the short term.



### *Bracknell*

- 3.104 Bracknell is designated as a Secondary Regional Centre in the SEP. Planning permission has been granted for a mixed-use regeneration scheme, to include 56,171 sqm (net) comparison floorspace. Work was due to commence in 2008. However, we understand that this has been postponed due to the current economic climate. In any event, we anticipate that the development will proceed during the plan period and will represent a real risk to Woking's market share.

### *Aldershot*

- 3.105 Aldershot is designated as a Secondary Regional Centre in the SEP. A mixed retail and leisure use development on a site of 2.8 hectares to the west of town centre is due to open end of 2009. This will improve the offer in Aldershot, potentially threatening Woking's market share.

### *Farnborough*

- 3.106 Farnborough is designated as a Secondary Regional Centre in the SEP. We understand development has commenced on a remodelling of part of the town centre to allow for a development of 110,000 sq m mixed used residential and retail development , including a new Sainsbury's store and 30 units shops.

## Summary of Town Centre Hierarchy

- 3.107 Our suggested revision to the hierarchy of centres is set out in the following table. This is based on our consideration of the role and function of each centre within the borough and recourse to the advice in PPS6.

**Table 3.8 Suggested Revision to the Borough's Hierarchy of Centres**

<b>Position in Hierarchy</b>	<b>Existing</b>	<b>Proposed</b>
Town Centre	Woking	Woking
District Centre	Byfleet, Goldsworth Park, Horsell, Kingfield, Knaphill, Sheerwater, St Johns, West Byfleet.	West Byfleet,
Local Centre	Anchor Hill, Barnsbury, Brookwood, Gorsewood Road, Guildford Road, Hermitage Road, Maybury, Mayford, Old Woking, Oriental Road, Pyrford, Rydens Way, Walton Road, Westfield, Wych Hill	Byfleet, Goldsworth Park, Horsell, Kingfield, Knaphill, Sheerwater, St Johns.
Neighbourhood Centres and Shopping Parades	-	Anchor Hill, Barnsbury, Brookwood, Gorsewood Road, Guildford Road, Hermitage Road, Maybury, Mayford, Old Woking, Oriental Road, Pyrford, Rydens Way, Walton Road, Westfield, Wych Hill

Note: the fourth level of the hierarchy are not considered to be 'centres', in accordance with the guidance in the footnote to Table 1, Annex A of PPS6

## 4 KEY FINDINGS FROM VISITOR SURVEYS

### Introduction

- 4.1 One of the key indicators of vitality and viability, identified in paragraph 4.4 of PPS6, is customer and residents' views and behaviour. As a consequence, we commissioned NEMS Market Research to undertake a survey of 1,100 household residents throughout the study area, together with a survey of 200 visitors to Woking, 100 visitors to West Byfleet and 100 visitors to Knaphill.
- 4.2 The findings of the household surveys are presented in **Section 5** of our report, in discussing current patterns of retail and leisure spending, whereas the findings of the survey of pedestrians are reported in **Appendix 6**. Thus, in this section of our report, we identify the key findings from the survey of pedestrians, focusing on customer satisfaction ratings, customer behaviour, suggestions for improvements and the cultural offer.
- 4.3 Within our results we have used both weighted and unweighted figures for mode of travel to the centre and data, to make the results more representative. For the rest of the indicators we have only used unweighted data. The URPI, Information Brief 91/2, April 1991 states that:

*'Since people who shop frequently are more likely to be interviewed than those who shop less frequently, they will be over-represented in a sample of shopping trips. To correct this over-representation, each respondent's data should be weighted, using a weight less than one for frequent shoppers, and a weight greater than one for infrequent shoppers. The simplest weight to use is the reciprocal of the trip frequency. That is, each respondent's data should be divided by the frequency with which that person visits the shopping centre. This is similar to the Politz-Simmons weighting method sometimes used to adjust for not-at-home bias in household interviews. Data from a person who shops three times a week should be weighted by a half, data from a person who shops once a fortnight should be weighted by two.'*

### Mode of Travel

- 4.4 The most popular mode of travel to all of the centres was by car, and the second most popular was by foot. The amount of people arriving to the centres on public transport was low for all three centres. However it is noteworthy that public transport in Woking (15%) is almost double the amount in the two smaller centres, West Byfleet (7%) and Knaphill (9%). This is expected as it is a larger town with more bus and rail links which connect to a wider area.
- **Woking:** 40% of visitors arrived by car and a further 10% as passengers. 28% travelled by foot and 5% arrived by bicycle.
  - **West Byfleet:** 57% of visitors relied upon the car to get to the centre and a further 4% travelled as a car passenger. 27% of visitors travelled by foot and 4% arrived by bicycle.

- **Knaphill:** 45% of visitors travelled by (1% as passengers). A high percentage, 42% arrived on foot and, 3% arrived by bicycle.

## Frequency of Visits to the Centres

4.5 As is evident in Table 4.1 and Table 4.2 below, of the three centres, West Byfleet was visited most often with almost a third visiting 4-6 days a week. A quarter of people surveyed visited Woking one day a week and almost a third of people visited Knaphill one day a week. These figures are understandable since West Byfleet is a medium sized centre with a supermarket and is easily accessible, whereas Woking is a large, busy centre where people are more likely to go to buy high order goods. Knaphill is a small centre with a limited shopping range and small convenience store.

**Table 4.1 Frequency of Visits to Centre (unweighted)**

Centre	Top 3 Responses - % of Total Responses in Each Centre		
	1	2	3
Woking	1 day a week (25%)	2-3 days a week (24%)	Once every 2 weeks (15%)
West Byfleet	4-6 days a week (30%)	1 day a week (26%)	2-3 days a week (25%)
Knaphill	1 day a week (30%)	2-3 days a week (24%)	Once every 2 weeks (15%)

**Table 4.2 Frequency of Visits to Centre (weighted)**

Centre	Top 3 Responses - % of Total Responses in Each Centre		
	1	2	3
Woking	Once every month (35%)	Once every 2 weeks (21%)	One day a week (18%)
West Byfleet	1 day a week (34%)	Once every month (21%)	2-3 days a week (13%)
Knaphill	Once every month (37%)	Once every 2 weeks (23%)	One day a week (23%)

## Main Purpose of Visit

- 4.6 The pedestrian survey questioned the main purpose of visit on the day of the survey and the top three responses for each centre are as set out in Table 4.3 below. Many people go to Woking to buy non-food items, the centre has two shopping centres both with numerous shops selling a range of comparison goods. West Byfleet has a large Waitrose within the centre which is reflected in the results in Table 4.3, demonstrating that the majority of people visit the centre to buy food items. Despite the lack of supermarket in Knaphill, 20% of respondents stated the purchase of food items was the main reason for their visit, this is likely to be due to a number of respondents including the Sainsbury's which is outside of the centre.

**Table 4.3 Main Purpose of Visit to Centre (% of people)**

Centre	Top 3 Responses - % of Total Responses in Each Centre		
	1	2	3
Woking	To buy non-food items (37%)	Work (18%)	To meet someone (9%)
West Byfleet	To buy food items (43%)	Work (16%)	To meet someone (7%)
Knaphill	To buy food items (20%)	For services (17%)	To meet someone (11%)

## Likes and Dislikes

- 4.7 The pedestrian survey also canvassed customer likes and dislikes, and satisfaction with respect to the range and quality of shops in the centre; the findings are set out in Table 4.4 and Table 4.5 below. All three centres were liked most of all because of their convenience, with half of visitors expressing this view in each centre. However the reasons for the visitors disliking the centres were different. Visitors in Woking and Knaphill appear to be happy with the centres, with over a third in both centres saying there is 'nothing' they dislike. However for West Byfleet 27% of visitors stated the parking being expensive as a dislike. Likewise, in Woking 19% of people stated they disliked the parking being expensive.

**Table 4.4 Aspects Most Liked/Disliked about the Centres (% of people)**

Top 3 Responses - % of Total Responses in Each Centre						
Centre	Like Most			Dislike Most		
	1	2	3	1	2	3
Woking	Near/ convenient (46%)	Selection/ choice of multiple shops (25%)	Selection/ choice of independent/ specialist shop (16%)	Nothing (34%)	Parking is expensive (19%)	General lack of independent shops (12%)
West Byfleet	Near/ convenient (51%)	Good public transport links (34%)	Character/ atmosphere (33%)	Parking is expensive (27%)	General lack of independent shops (24%)	General lack of choice of multiple shops (21%)
Knaphill	Near/ convenient (51%)	Parking is cheap (23%)	Parking is easy (20%)	Nothing (38%)	Dirty shopping streets (15%)	General lack of choice of multiple shops (10%)

**Table 4.5 Satisfaction with Range and Quality of Shops in Centre (% of people)**

Centre	Satisfied or very satisfied	Neutral	Dissatisfied or very dissatisfied	No opinion/ don't know
Woking	67%	22%	11%	1%
West Byfleet	43%	31%	24%	2%
Knaphill	57%	25%	17%	1%

- 4.8 The majority of people in both Woking (67%) and Knaphill (57%) are happy with the range and quality of shops within the centre, evident in Table 4.5 above. The figure was slightly lower in West Byfleet at 43%. Overall people seem satisfied with what the centres have to offer.

## Environmental Satisfaction Ratings

- 4.9 The pedestrian survey also sought customer satisfaction ratings in relation to five environmental factors, as set out in Table 4.6 below.

**Table 4.6 Assessment of Environmental Quality (% of people)**

Centre	Environmental Factor - Top Responses (as a % of Total Responses in Each Centre)				
	Cleanliness of shopping streets	Personal safety / lighting / policing issues	Quality of buildings / townscape	Shelter from weather	Pedestrian / vehicular safety issues
Woking	Good or very good (64%)	Good or very good (67%)	Good or very good (51%)	Good or very good (68%)	Good or very good (72%)
West Byfleet	Good or very good (70%)	Good or very good (58%)	Good or very good (38%)	Satisfactory (35%)	Satisfactory (37%)
Knaphill	Satisfactory (34%)	Good or very good (42%)	Satisfactory (40%)	Poor or very poor (44%)	Satisfactory (38%)

- 4.10 It is noteworthy that:
- Woking was the highest performing centre, receiving high numbers of 'good or very good' responses for environmental factors within the centre, the highest being for pedestrian/ vehicular safety (72%).
  - West Byfleet achieved the best customer satisfaction ratings in relation to cleanliness of streets.
  - Knaphill was the lowest performing centre, with 3 'satisfactory' and 1 'poor or very poor' rating. In Knaphill personal safety/ lighting/ policing issues scored the highest, achieving 'good or very good' at 42%.

## Accessibility Satisfaction Ratings

- 4.11 The visitor survey also sought customer satisfaction ratings in relation to eight accessibility factors, as set out in Table 4.7 below. The findings reveal that:
- All centres receive a high percentage of 'good or very good' rating for location and security of car parks, amount/quality of pedestrianisation and ease of movement around the centre on foot. This isn't surprising as all the centres were also considered very convenient which was mentioned above, shown in Table 4.4.
  - Many of the visitors within Woking and Knaphill did not know about ease of cycling within these centres. This suggests that there needs to be more cycle awareness within these centres.
  - In general it is felt by visitors that accessibility of all three centres is good.



**Table 4.7 Assessment of Accessibility (% of people)**

Accessibility Factor - Top Response (as a % of Total Responses in Each Centre)								
Centre	Location of car parks	Security of car parks	Location of rail / bus station	Security of rail / bus station	Ease of cycling access	Amount / quality of pedestrianisation	Ease of movement around centre on foot	Access for people with mobility / hearing / sight disabilities
Woking	Good or very good (75%)	Good or very good (67%)	Good or very good (85%)	Good or very good (65%)	Don't know (50%)	Good or very good (78%)	Good or very good (90%)	Good or very good (62%)
West Byfleet	Good or very good (64%)	Good or very good (57%)	Good or very good (81%)	Good or very good (46%)	Good or very good (43%)	Good or very good (47%)	Good or very good (64%)	Good or very good (35%)
Knaphill	Good or very good (65%)	Good or very good (47%)	Don't Know (81%)	Don't Know (51%)	Don't know (55%)	Good or very good (42%)	Good or very good (65%)	Don't know (53%)

## Suggestions for Improvement

- 4.12 Table 4.8 below sets out the most frequent responses relating to suggested improvements in each of the centres. Generally the top improvement for all three centres was for new stores. More specifically it is felt Woking could improve by having a further department store and West Byfleet and Knaphill by having a better choice of stores generally. Also both Woking and West Byfleet have had suggestions for cheaper parking.

**Table 4.8 Most Frequent Suggestions for Improvement in Each Centre**

Centre	Top 3 Responses <sup>1</sup> - % of Total Responses in Each Centre		
	1	2	3
Woking	More department stores / larger stores (19.4%)	Better choice of shops in general (16%)	Cheaper parking (14%)
West Byfleet	Better choice of shops in general (23%)	Cheaper parking (20%)	Fewer empty shops (18%) and more independent shops (18%)
Knaphill	Better choice of shops in general (20%)	Remove litter more often (12%)	More / improved supermarkets / food shops (8%)

## Leisure Facilities

- 4.13 Table 4.9 below sets out the most frequent responses relating to what leisure facilities people feel should be provided in the centres. The highest request for each centre varied however, second and third for both West Byfleet and Knaphill were the same, being the provision of a leisure centre and pubs/bars. The suggestion with the highest figure was more facilities for children in Knaphill.

**Table 4.9 Most Frequent Suggestions of Leisure Uses that Should be Provided**

Centre	Top 3 Responses - % of Total Responses in Each Centre		
	1	2	3
Woking	Family entertainment (22%)	Swimming pool (19%)	Other (16%)
West Byfleet	Cinema (28%)	Leisure centre (28%)	Pubs/bars (17%)
Knaphill	More facilities for children (30%)	Leisure centre (22%)	Pubs/bars (11%)

<sup>1</sup> The top three 'positive' responses are listed for each centre (i.e. we have not considered 'don't know' or 'none mentioned' to be a positive).

- 4.14 Table 4.10 below sets out the leisure time uses of which visitors consider the centres have too many of. Visitors within all three of the centres felt there were primarily too many restaurants and cafes, bars and pubs.

**Table 4.10 Leisure Time Uses of which Centres Have Too Many**

Centre	Top 3 Responses - % of Total Responses in Each Centre	
	1	2
Woking	Restaurants / Cafes (61%)	Bars / Pubs (33%)
West Byfleet	Restaurants / Cafes (78%)	Bars / Pubs (11%)
Knaphill	Restaurants / Cafes (93%)	Bars / Pubs (7%)

- 4.15 The majority of visitors within Woking and West Byfleet were satisfied with the performance of the centres for evening entertainment which is presented in Table 4.11 below. Slightly less than half of visitors to Knaphill were 'satisfied or very satisfied' with the centre for evening entertainment. Very few people were 'dissatisfied or very dissatisfied' with the evening entertainment in all three centres. Therefore it can be concluded that all three centres perform well as a location for evening entertainment.

**Table 4.11 Performance of Centres as a Location for Evening Entertainment**

Centre	Satisfied or very satisfied	Neutral	Dissatisfied or very dissatisfied	No opinion/ don't know
Woking	75%	18%	4%	4%
West Byfleet	54%	33%	13%	0%
Knaphill	46%	23%	13%	18%

### Cultural Offer within Woking

- 4.16 Majority of visitors within Woking were either satisfied or very satisfied with the town centre's overall cultural offer. This is likely to be due to the cinema complex and two theatres within the centre. A very small percentage (3%) was either 'dissatisfied or very dissatisfied'. These figures were not collated for either West Byfleet or Knaphill because these cultural attractions do not exist within these smaller centres.



## 5 CURRENT PATTERNS OF RETAIL AND LEISURE SPENDING

### Household Survey Methodology

- 5.1 Our assessment of current patterns of retail and leisure spending is based on a telephone survey of 1,100 households undertaken by NEMS Market Research in April 2009. The study area was defined on the basis of evidence from previous studies undertaken for the Council by DTZ and, consultations with officers of the Council. The survey's study area, the questionnaire, the tabulation results and a detailed explanation of the methodology, approach and results are all included at **Appendix 7**.
- 5.2 Due to retail and leisure patterns not being constrained by administrative boundaries, the study area is wider than the borough boundary and it is disaggregated into 11 zones, based on postcodes. There were approximately 100 successful respondents in each zone.
- 5.3 In respect of food and grocery shopping (known in PPS6 as 'convenience' shopping), the survey sought to establish patterns of convenience goods spending, based on the location of:
- the shop where the household spends most money on food and groceries, whether other shops were visited during the trip, the amount spent per week, how the household travels to the shops/store and how often (questions 1 to 5);
  - the shop where the household undertakes most 'top-up' food and groceries purchases and the amount spent per week (questions 6 and 7);
  - spending on food and groceries in small shops for those who named supermarkets in i) and ii) above (questions 8, 9 and 10).
- 5.4 In respect of non-food goods (known in PPS6 as 'comparison' shopping) the survey sought to establish patterns of comparison goods spending, based on the locations of the last two purchases of:
- Clothes and shoes (questions 11 to 14);
  - Furniture, carpets and soft household furnishings (questions 15 and 16);
  - DIY, decorating goods and gardening items (questions 17 and 18);
  - Electrical items, such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers and domestic appliances such as washing machines, fridges and cookers (questions 19 and 20); and
  - Health, beauty and chemist items (questions 21 and 22);
  - Recreational goods such as sports equipment, bicycles, musical instruments or toys (questions 23 and 24); and;
  - Specialist non-food items, such as books, CDs, jewellery, china and glass (questions 25 and 26).
- 5.5 The survey also established the proportion of the household's total spending on non-food goods that is accounted for by the internet (questions 27 and 28) and how frequently households visit Woking town centre and how it can be improved (questions 29 and 30);

5.6 In respect of commercial leisure services, questions 31 asked about the locations where each household spends most money on:

- restaurants/cafés;
- pubs/bars/nightclubs;
- cinema/theatre;
- gambling - casino/bingo/bookmaker;
- health and fitness;
- Family entertainment (such as ten pin bowling, skating and so on).
- And how frequently households visit certain leisure facilities within Woking town centre (question 31).

5.7 In order to understand patterns of spending in the study area, we must use one set of composite market shares for convenience goods and one set for comparison goods. The process for achieving this is explained at Appendix 7 and relies on amalgamating the results from a series of questions based on weights applied to the different types of shopping undertaken by residents of the study area.

5.8 The composite pattern of spending for convenience goods was achieved on the basis of the mean weekly household expenditure findings as follows in Table 5.1.

**Table 5.1 Mean Weekly Household Expenditure for the Study Area**

	Mean Household Spend	Percentage Weighting
Main Food & Groceries	£87.92	79.2%
Top-up Food & Groceries	£22.87	15.5%
Small Local Shops	£17.29	5.4%
All Convenience Goods	£68.27	100%

5.9 However, the composite pattern of spending for comparison goods was achieved on the MapInfo expenditure data in relation to seven categories of comparison expenditure as follows in Table 5.2.

**Table 5.2 Sub-Sections of Comparison Expenditure for the Study Area**

Goods	Percentage Weighting
Clothing and footwear	23.7%
Furniture, carpets and soft household furnishings	13.5%
DIY, decorating goods and gardening items	7.9%
Electrical items	16.7%
Health, beauty or chemist items	12.7%
Recreational goods	15.3%
Specialist non-food items	10.2%
All Comparison Goods	100.0%

5.10 We now describe the study area before explaining the patterns of retail and leisure spending within the study area. The key spreadsheets necessary to understand this exercise are included within **Appendix 8**, where we combined population and expenditure

to understand the monetary values of shopping patterns. A more detailed explanation of the quantitative need assessment that these assessments underpin can be found at **Section 6**.

## Study Area

- 5.11 The study area can be found at Appendix 7; it comprises 11 zones, based on postcodes. The approach adopted is based on the DTZ zonal pattern, includes the subdivision of zones 1 and 3, and the addition of zones 7 and 8.
- 5.12 For convenience, we have labeled the zones as set out in Table 5.3. Thus, the majority or all of the population in Zones 1A, 1B, 1C and 2 live within the administrative area of the borough; the majority of the population in Zones 3A and 3B live within the administrative area of Guildford; the majority of the residents of Zones 4 and 5 live within the administrative area of Surrey Heath; the majority of the population in Zone 6 live within the administrative area of Runnymede; the majority of the population in Zone 7 live within the administrative area of Windsor & Maidenhead; and the majority of the population in Zone 8 live within the administrative area of Elmbridge.

**Table 5.3 Study Area**

<b>Zone Number</b>	<b>Predominant Administrative Area Based on Population</b>
1A	Woking
1B	Woking
1C	Woking
2	Woking
3A	Guildford
3B	Guildford
4	Surrey Heath
5	Surrey Heath
6	Runnymede
7	Windsor & Maidenhead
8	Elmbridge

- 5.13 We now turn to the spending patterns within the study area. Specifically, we refer to the findings within the spreadsheet tabulations numbered Tables 1-20 in Appendix 8, focusing on the base year position of 2009.

## Comparison Goods Spending Patterns

- 5.14 The per capita spend on comparison goods in 2009 (Table 3, Appendix 8) varies from £4,154 in Zone 6 to £4,807 in Zone 8. The total amount of comparison goods spending for residents of the whole of the catchment area in 2009 is £1,615.7 million (Table 3, Appendix 8), of which £197.1 million, or 12.2%, we have estimated is spent on Special Forms of Trading (catalogue, TV and internet shopping, which we subsequently abbreviate as SFT). The pattern of expenditure flows for the comparison goods sector as

a whole, as revealed by the survey of households, is set out in Tables 5 and 6 (excluding SFT) at Appendix 8.

- 5.15 Overall, some 52.4% of the expenditure on comparison goods of residents of the study area is spent in town, district and local centres, in retail parks and in freestanding stores which are located within the study area. The balance of 53.8% is spent in locations outside of the study area. This is shown at Table 5.3 below.

**Table 5.4 Study Area Retention Level for Comparison Goods Expenditure**

<b>Broad Destination for Comparison Goods Expenditure</b>	<b>£m</b>	<b>%</b>
Retained Expenditure	663.4	52.4
Other Destinations Outside Study Area	755.2	47.6
<b>TOTAL</b>	<b>1,418.6</b>	<b>100.0</b>

- 5.16 In relation to the aggregate retention rate of destinations within the borough, 34.7% of the expenditure on comparison goods is spent within the study area in town, district and local centres, in retail parks and in freestanding stores which are located within the borough. The balance, of 65.3% is spent in on locations outside of the borough.

**Table 5.5 Woking Borough Retention Level for Comparison Goods Expenditure**

<b>Broad Destination for Comparison Goods Expenditure</b>	<b>£m</b>	<b>%</b>
Retained Expenditure	400.7	34.7
Other Destinations Outside Woking Borough	1,017.9	65.3
<b>TOTAL</b>	<b>1,418.6</b>	<b>100.0</b>

- 5.17 The estimated comparison goods turnovers of the town centres located within the study area, prior to making any allowance for any expenditure inflow from those who are resident beyond the study area, are set out in the penultimate column of Table 6, Appendix 8 and are summarised in Table 5.6 below. The centres/retail parks which are *italicised* are located within the study area but outside the administrative boundary of the borough.



**Table 5.6 Comparison Goods Expenditure Retained within the Study Area**

<b>Destinations within the Study Area</b>	<b>Comparison Goods Turnover Drawn from Study Area Residents (£m)</b>
<i>Woking</i>	<i>306.3</i>
<i>Knaphill</i>	<i>18.4</i>
<i>Byfleet</i>	<i>10.6</i>
<i>West Byfleet</i>	<i>16.9</i>
Frimley	11.6
Addlestone	48.8
Ascot	5.9
Cobham	11.4
Weybridge	62.0
<b>Retail Parks and Freestanding Stores within the Study Area</b>	<b>Comparison Goods Turnover Drawn from Study Area Residents (£m)</b>
<i>Redding Way, Knaphill, Woking</i>	<i>13.4</i>
<i>Lion Retail Park, Oriental Road, Woking</i>	<i>25.5</i>
Ladymead Retail Park, Guildford	38.2
Paddock Retail Park, Weybridge	36.2

- 5.18 Table 5.6 confirms Woking's status as a town centre, with a comparison goods turnover of approximately £306 million and demonstrates its position at the top of the retail hierarchy. Table 5.6 shows the popularity of Lion Retail Park as a location for comparison goods spending; it draws £25.5 million from residents in the study area and it is the clear second destination for comparison goods purchases within the borough's administrative area.
- 5.19 Furthermore, we note that the third ranking location within the borough is Knaphill with a turnover drawn from study area residents of £18.4 million; however we anticipate this turnover has been inflated due to some respondents referring to Homebase or Sainsbury's when answering Knaphill to comparison questions.
- 5.20 In terms of expenditure leakage to outside the borough, Weybridge and Addlestone achieve a high proportion of turnover. This is to be expected since the study area incorporates a large proportion of the catchment of these two centres.
- 5.21 The main destinations for leakage beyond the study area are shown in the penultimate column of Table 6, Appendix 8 and summarised in Table 5.7 below. There are a number of different destinations for expenditure leakage. This reflects the choice of centres in this part of south east England.

**Table 5.7 Comparison Goods Expenditure Leakage from the Study Area**

<b>Towns Outside the Study Area</b>	<b>Comparison Goods Expenditure Leakage (£m)</b>
Guildford	225.4
Camberley	99.4
Farnborough	80.0
Kingston upon Thames	61.6
Walton on Thames	48.3
Staines	48.0

- 5.22 Due partly to the geography of the study area, Guildford has a dominant influence. In addition, Camberley, Walton on Thames and Staines all benefit from recent town centre developments that will have improved their performance vis-à-vis their competitors.

### Household Survey Results in 2004 compared to 2009

- 5.23 Table 5.8 below compares the results discussed above with those presented as part of the 2004 DTZ study. The 2004 study only assessed zones 1-6 and thus we had to limit our approach to results from these six zones. This is essentially a crude exercise since different surveys have been used for both studies, the figures in the table below provides an indication of market share trends from 2004 to 2009.
- 5.24 The analysis shows that Woking town centre has improved its market share in the core zones 1 to 6, whilst Guildford has experienced a decline in its market share from these zones. The opening of Debenhams (in replacement of Allders) since the 2004 study is likely to be responsible for the increase in Woking town centre's market share. However, we do not expect that the 2009 survey has fully reflected the closure of Marks and Spencer (M&S) in the Peacocks Centre.

**Table 5.8 Comparison Goods Market Share in 2004 and 2009**

<b>Centre</b>	<b>2004 (%)</b>	<b>2009 (%)</b>
Woking	17.9%	25.4%
Knaphill	0.1%	1.5%
West Byfleet	1.7%	2.7%
Lion Retail Park	3.5%	1.8%
Camberley	9.4%	7.1%
Farnborough	7.5%	5.8%
Guildford	28.7%	16.8%
Kingston	1.4%	2.5%

- 5.25 In respect of Knaphill, there is a significant increase in market share, although as explained earlier we anticipate this is due to the influence of Homebase and Sainsbury's with some respondents referring to these two stores when answering Knaphill.
- 5.26 In addition, we note that the Lion Retail Park has suffered a decline in its market share. We expect that this has been due in part to the closure of Harveys although the market share may have recovered through the recent opening of an Argos Extra on the retail park. The household survey may not have fully reflected this change in occupier.

## Comparison Goods Catchment Areas

- 5.27 Catchment area plans are attached at Figures 1-9 at **Appendix 9**. These plans graphically present the market share by zone with the darker colours of red representing a higher market share. As a further exercise, we have looked at the dominant centres and those centres with a subsidiary influence on each zone, as set out in Table 5.9.

**Table 5.9 Dominant Comparison Goods Centres and Centres of Subsidiary Influence**

<b>Zone</b>	<b>Dominant Centre (Market Share 40%+)</b>	<b>Centres of Subsidiary Influence (Market Share 10% to 39%)</b>
1A	Woking	Guildford
1B	Woking	-
1C	Woking	Guildford
2	-	Paddock Retail Park, Weybridge/West Byfleet
3A	Guildford	Woking
3B	Guildford	Woking/Ladymead Retail park, Guildford
4	-	Camberley/Farnborough
5	-	Woking/Guildford/Camberley/Farnborough
6	-	Woking/Staines/Weybridge
7	-	Bracknell/Staines/Camberley
8	-	Walton-on-Thames/Kingston/Weybridge

- 5.28 Woking is the unopposed dominant centre in only zone 1B and is also the dominant centre in zones 1A and 1C. In these latter two zones Woking is competing with Guildford centre which has a subsidiary influence. Woking has a subsidiary influence in zones 3A; 3B; 5 and 6. West Byfleet has a subsidiary influence in zone 2.
- 5.29 Guildford is the dominant centre in zones 3A and 3B, with Woking having a subsidiary influence in this zone. For five zones there is no dominant centre and it is these zones for which the competition for market share is most intense.

## Patterns of Convenience Goods Expenditure

- 5.30 The per capita spend on convenience goods in 2009 (Table 9. Appendix 8) varies from lows of £1,963 in zone 1A (Central Woking) and to highs of £2,221 in zone 1B (Knaphill/St John's). The total amount of convenience goods spending for residents of the whole study area in 2009 is £708.5 million; see Table 10 in Appendix 8.

5.31 The pattern of expenditure flows for the convenience goods sector as a whole (excluding SFT), as revealed by the survey of households, is set out in Tables 11 and 12 in Appendix 8.

5.32 As with the comparison goods exercise, we have calculated the retention level for the study area and for the borough, which can be found in the final two columns of Table 12, Appendix 8. Overall, some 75.8% of the expenditure on convenience goods of residents of the study area is spent in stores within the study area, as summarised in Table 5.10

**Table 5.10 Study Area Retention Level for Convenience Goods Expenditure**

<b>Broad Destination for Convenience Goods Expenditure</b>	<b>£m</b>	<b>%</b>
Retained Expenditure within Study Area	549.1	75.2
Other outside Study Area	175.1	28.2
<b>TOTAL</b>	<b>724.1</b>	<b>100%</b>

5.33 The borough aggregate retention rate of study area expenditure is 28.2%, which is summarised in Table 5.11.

**Table 5.11 Woking Borough Retention Level for Convenience Goods Expenditure**

<b>Broad Destination for Convenience Goods Expenditure</b>	<b>£m</b>	<b>%</b>
Retained Expenditure within Woking Borough	197.7	37.1
Other outside Study Area	502.1	62.9
<b>TOTAL</b>	<b>699.8</b>	<b>100%</b>

5.34 We can take this exercise further and focus on the zones within the borough, namely zones 1A, 1B, 1C, and 2 combined. There is a total of £180.2 million of convenience expenditure within these four zones and £147.4 million is spent in stores within the borough, with the main source of leakage the Tesco Extra store at Brooklands. This represents a retention rate of the core four zones of 82%.

5.35 The estimated convenience goods turnovers of the foodstores located within the study area, prior to making any allowance for any expenditure inflow from those who are resident beyond the study area, are set out in Table 12, Appendix 8 and are summarised in Table 5.12 below. The foodstores *italicised* in Table 5.12 are located within the study area, but outside the administrative boundaries of the borough itself.

**Table 5.12 Turnover of Main Foodstores derived from Study Area**

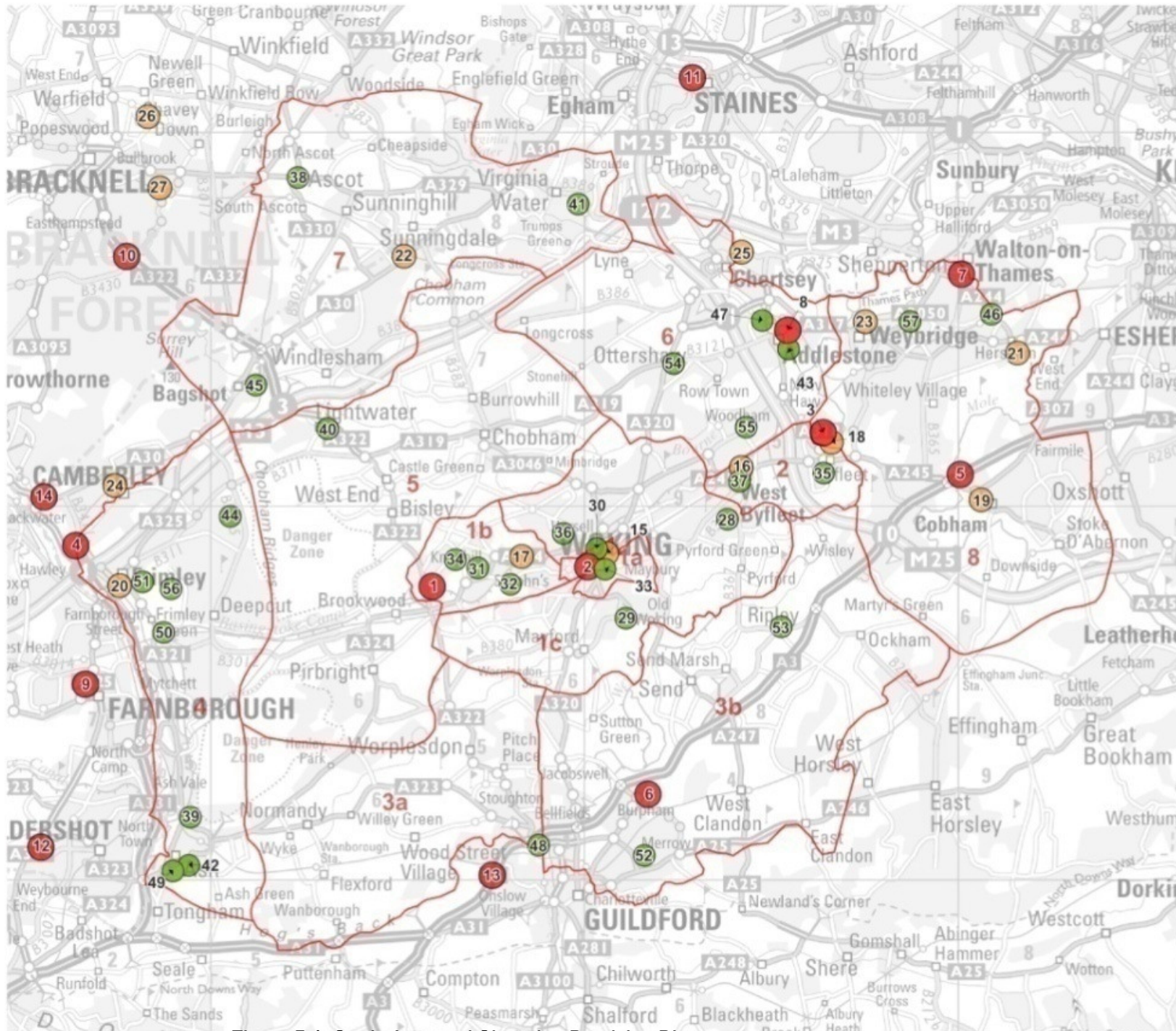
<b>Foodstores Within the Study Area</b>	<b>Convenience Goods Turnover Drawn from Study Area Residents (£m)</b>
Morrisons, Goldsworth Road, Woking	50.0
Sainsbury's, Wolsey Walk, Woking	13.2
Co-op, High Street, Knaphill	2.3
Sainsbury's, Redding Way, Knaphill	67.1
Waitrose, Goldworth Park, Woking	20.5
Waitrose, West Byfleet	25.6
<i>Sainsbury's, Clay Lane, Guildford</i>	59.6
<i>Sainsbury's, Blackwater Valley Road, Camberley</i>	28.5
<i>Waitrose, High Street, Frimley</i>	11.4
<i>Budgens, Guildford Road, Lightwater</i>	3.9
<i>Co-op, The Broadway, Addlestone</i>	2.4
<i>Tesco Extra, Station Road, Addlestone</i>	44.5
<i>Somerfield, The Square, Bagshot</i>	3.8
<i>Waitrose, London Road, Sunningdale</i>	16.5
<i>Marks &amp; Spencer, Barnes Wallace Drive, Weybridge</i>	4.3
<i>Sainsbury's, Bridge Way, Cobham</i>	18.9
<i>Sainsbury's, New Zealand Avenue, Walton-on-Thames</i>	20.8
<i>Tesco Extra, Barnes Wallace Drive, Weybridge</i>	46.3
<i>Waitrose, Between Streets, Cobham</i>	11.1
<i>Waitrose, Hersham Centre, Hersham</i>	13.3
<i>Waitrose, High Street, Weybridge</i>	17.9

- 5.36 There are 21 foodstores located within the study area, as listed in Table 5.12, which collectively account for 67% of the study area expenditure, compared to a total retention level of 75%. Whilst some of these stores are small (such as the Co-ops and Budgens), the great majority are larger foodstores. This reflects the polarisation trend experienced in the convenience goods sector, whereby there has been continued growth in the aggregate market share of the top four operators - Tesco, Asda, Sainsbury's and Wm Morrison (and in Surrey Waitrose can be added to this list due to its local dominance) at the expense of smaller supermarket operators and independent retailers.
- 5.37 The main leakage destinations for convenience goods expenditure, again as shown in the penultimate column of Table 12, Appendix 8, are set out in Table 5.13 below.

**Table 5.13 Main Destinations for Convenience Goods Expenditure Leakage**

<b>Stores Outside the Study Area</b>	<b>Convenience Goods Expenditure Leakage (£m)</b>
Asda, Princes Mead Shopping Centre, Farnborough	15.9
Sainsbury's, Ringmead, Bracknell	12.0
Sainsbury's, White Hart Row, Chertsey	7.6
Sainsbury's, The Causeway, Staines	6.0
Tesco Extra, The Meadows, Sandhurst	24.2
Tesco, Wellington Avenue, Aldershot	20.6
Tesco, County Lane, Bracknell	4.2
Tesco, Whitton Road, Bracknell	6.5
Tesco, Ashden Road, Guildford	24.9

- 5.38 The localised convenience goods retention rate is the proportion of expenditure on convenience goods available to residents in a specific zone which is spent in town centres and stores located that same zone. This data can be derived from Table 12, Appendix 8 and is graphically presented in Figure 10, Appendix 9. The zonal retention level is strongly linked to the distribution of large foodstores, which is presented graphically in Figure 5.1.



## Study Area and Shopping Provision Plan

### ● Superstore (2,500 sq m net)

- 1 - Sainsbury's, Redding Way, Woking
- 2 - Morrisons, Goldsworth Road, Woking
- 3 - Tesco Extra, Barnes Wallace Drive, Weybridge
- 4 - Sainsbury's, Blackwater Valley Road, Camberley
- 5 - Sainsbury's, Bridge Way, Cobham
- 6 - Sainsbury's, Clay Lane, Guildford
- 7 - Sainsbury's, New Zealand Avenue, Walton
- 8 - Tesco Extra, Station Road, Addlestone
- 9 - Asda, Princes Mead Shopping Centre, Farnborough
- 10 - Sainsbury's, Ringmead, Bracknell
- 11 - Sainsbury's, The Causeway, Staines
- 12 - Tesco, Wellington Avenue, Aldershot
- 13 - Tesco, Ashenden Road, Guildford
- 14 - Tesco Extra, The Meadows, Sandhurst

### ● Supermarket (1,000 to 2,500 sq m net)

- 15 - Sainsbury's, Wolsley Walk, Woking
- 16 - Waitrose, Station Approach, West Byfleet
- 17 - Waitrose, Goldsworth Park Centre, Woking
- 18 - Marks & Spencer, Barnes Wallis Drive, Weybridge
- 19 - Waitrose, Between Streets, Cobham
- 20 - Waitrose, High Street, Frimley
- 21 - Waitrose, Hershams Centre, Hershams
- 22 - Waitrose, London Road, Sunningdale
- 23 - Waitrose, High Street, Weybridge
- 24 - Sainsbury's Central, Cambridge Walk, Camberley
- 25 - Sainsbury's, Sainsbury Centre, Chertsey
- 26 - Tesco, County Lane, Bracknell
- 27 - Tesco, Whitton Road, Bracknell

### ● Other Foodstores (<1,000 sq m net)

- 28 - Co-op, Marshall Parade, Woking
- 29 - Sainsbury's Local, Ashcombe Parade, Woking
- 30 - Marks & Spencer, The Peacocks Centre, Woking
- 31 - Co-op, Inkerman Parade, Knaphill
- 32 - Co-op, St John's Road, Woking
- 33 - Co-op, Guildford Road, Woking
- 34 - Co-op Food, High Street, Knaphill
- 35 - Co-op Food, Cobb House, West Byfleet
- 36 - Co-op Food, High Street, Horsell
- 37 - Tesco Express, Old Woking Road, West Byfleet
- 38 - Budgens, The Hermitage, Ascot
- 39 - Budgens, Wharf Road, Ash Vale
- 40 - Budgens, Guildford Road, Lightwater
- 41 - Budgens, Station Approach, Virginia Water
- 42 - Co-op, Ash Street, Aldershot
- 43 - Iceland, Station Road, Addlestone
- 44 - Sainsbury's Local, Heatheridge Arcade, Frimley
- 45 - Somerfield, The Square, Bagshot
- 46 - Somerfield, Harsham Road, Walton On Thames
- 47 - Co-op, Green Lane, Addlestone
- 48 - Co-op, Woodbridge Hill, Guildford
- 49 - One Stop, Ash Street, Aldershot
- 50 - One Stop, The Green, Camberley
- 51 - One Stop, Ansell Road, Frimley
- 52 - One Stop, Collingwood Crescent, Guildford
- 53 - One Stop, High Street, Guildford
- 54 - One Stop, Brox Road, Woking
- 55 - Co-op Market Town, The Broadway, Addlestone
- 56 - Tesco Express, Beaumaris Parade, Camberley
- 57 - Tesco Express, Queens Road, Weybridge

NB: Store outside study area with less than 5% market share are disregarded

Figure 5.1 Study Area and Shopping Provision Plan

- 5.39 The zonal retention level for the study area is set out at Table 5.14. The retention level is highest for zone 8 (Cobham/Weybridge) which has a localised retention rate of 84.7% and is influenced by the Tesco Extra at Brooklands. The next highest localised retention rates for convenience goods are for zone 3B (NE Guildford), which has a localised retention rate of 67.5% and zone 1B (Knaphill/St John's) which has a localised retention rate of 65.4%.

**Table 5.14 Localised Convenience Goods Retention Levels**

Zones	Area	Localised Convenience Goods Retention Rate (%)
1a	Central Woking	50.0
1b	Knaphill/St Johns	65.4
1c	Rural Woking	6.9
2	West Byfleet/Byfleet	37.3
3a	NW Guildford	2.0
3b	NE Guildford	67.5
4	Frimley/Ash	40.9
5	Chobham/Lightwater	10.0
6	Addlestone/Ottershaw	55.2
7	Ascot/ Sunningdale	36.3
8	Cobham/Weybridge	84.7

- 5.40 Despite the fact that most convenience goods expenditure is retained by stores located within the study area, the survey results indicate that there are three parts of the catchment where the localised retention rate is low. These are:
- NW Guildford (Zone 3A), where the localised retention rate is just 2.0%, and where most residents travel to Morrisons, Woking, Waitrose at West Byfleet or Sainsbury's, Knaphill;
  - Rural Woking (Zone 1C), where the localised convenience goods retention rate is just 6.9% and where most residents travel to the Morrisons, Woking or Sainsbury's, Knaphill.
  - Chobham/Lightwater (Zone 5), where the localised retention rate is 10.0% due to almost half (48%) of expenditure travelling to the Sainsbury's at Knaphill.
- 5.41 Although the survey findings suggest that there is a need for an improved convenience offer in these zones only one of these is within the borough (Zone 1C). Importantly, under our suggested revision to the shopping hierarchy, there is no town or district centre within zone 1C. Thus we do not see any justification to improve the retention level in Zone 1C. The important step will be to relieve the dominance of large out of centre destinations, such as Sainsbury's at Brookwood, with foodstore development in existing centres.

## Convenience Goods Catchment Areas

- 5.42 As we have explained in the preceding paragraphs, convenience goods shopping has relatively localised catchment areas. In Table 5.15, we present an analysis of convenience goods market shares. This shows dominant stores with a zonal market share



of over 30% and stores with shares between 10 and 30%, which have subsidiary influence.

**Table 5.15 Market Shares for Convenience Goods Dominant Stores and Stores with Subsidiary Influence**

<b>Zone</b>	<b>Dominant Stores (Market Share of 30%+)</b>	<b>Subsidiary Stores (Market Share 10 to 30%)</b>
1a	-	Morrisons, Goldsworth Road, Woking Sainsbury's, Wosely Walk, Woking Sainsbury's, Redding Way, Knaphill Waitrose, Goldsworth Park, Woking
1b	Sainsbury's, Redding Way, Knaphill	Morrisons, Goldsworth Road, Woking Waitrose, Goldsworth Park, Woking
1c	-	Morrisons, Goldsworth Road, Woking Sainsbury's, Redding Way, Knaphill Waitrose, West Byfleet
2	Tesco Extra, Barnes Wallace Drive, Weybridge	Waitrose, West Byfleet
3a	-	Sainsbury's, Clay Lane, Guildford
3b	Sainsbury's, Clay Lane, Guildford	-
4	-	Sainsbury's, Blackwater Valley Road, Camberley
5	Sainsbury's, Redding Way, Knaphill	-
6	Tesco Extra, Station Road, Addlestone	Tesco Extra, Barnes Wallace Drive, Weybridge
7	-	Waitrose, London Road, Sunningdale
8	-	Sainsbury's, Bridge Way, Cobham Sainsbury's, New Zeland Avenue, Walton on Thames Tesco Extra, Barnes Wallace Drive, Weybridge Waitrose, Hersham Centre, Hersham Waitrose, High Street, Weybridge

5.43 The analysis in Table 5.15 shows that only five of the 11 survey zones have a dominant store with a market share of over 30%; these are zone 1A (Central Woking), zone 2 (West Byfleet/Byfleet), zone 3B (NE Guildford), zone 5 (Chobham/Lightwater) and zone 6 (Addlestone/Ottershaw).

5.44 The survey findings confirm that most convenience shopping is undertaken on a highly localised basis. Indeed, Table 12, Appendix 8 reveals that only four stores within the catchment area have market shares of over 10 per cent in three or more zones; namely the Morrisons store at Woking; the Sainsbury's store at Brookwood and the Tesco Extra store at Brooklands.

## Pattern of Spending on Leisure Services

5.45 The telephone survey of households also included a number of questions that asked residents of the study area where they spent most money in relation to various types of leisure services, as follows:

- Restaurants;
- Cafes, pubs, bars;
- Cinemas/theatres;
- Bingo/casinos/bookmakers;
- Health and fitness centres, and;
- Family entertainment centres (i.e. ten pin bowling and skating).

5.46 The most popular destinations for these different activities for residents of each survey zone, is set out in Table 5.16.

### *Restaurants*

5.47 Almost 80% households across the study area undertake visits to restaurants and cafés. The most popular destinations, by far, are Guildford (9.6%) and Woking town centre (8.2%) Weybridge and West Byfleet are the next most popular destinations at 6% and 3.6% respectively.

**Table 5.16 Most Popular Destinations for Expenditure on Leisure Services**

Survey Zone	Restaurants	Cafes/ Bars/ Clubs	Cinema/ Theatre	Bingo, Casino & B'maker	Health & Fitness	Family Entertainment
1A	Woking	Woking	Woking	Woking	Woking Leisure Centre/Pool in the Park - Woking	Guildford Spectrum - Parkway, Guildford
1B	Woking	Woking	Woking	Woking	Woking Leisure Centre/Pool in the Park - Woking	Guildford Spectrum - Parkway, Guildford
1C	Woking	Woking	Woking	Woking	Woking Leisure Centre/ Pool in the Park - Woking	Woking Big Apple
2	West Byfleet	West Byfleet	Woking	West Byfleet/ Woking	Nuffield Health & Wellbeing, Pyrford Road, West Byfleet	Guildford Spectrum - Parkway, Guildford
3A	Guildford	Guildford	Guildford	Guildford	Guildford Spectrum, Parkway, Guildford	Guildford Spectrum - Parkway, Guildford
3B	Guildford	Guildford	Guildford	Guildford	Guildford Spectrum, Parkway, Guildford	Guildford Spectrum - Parkway, Guildford
4	Camberley	Camberley	Camberley	Camberley/ Woking	The Arena Leisure Centre, Camberley	Bowlplex - The Atrium, Park Street, Camberley
5	Chobham	Woking	Woking	-	Lightwater Leisure Centre	Guildford Spectrum - Parkway, Guildford
6	Addlestone	Addlestone	Woking	Addlestone	Other zones 6	Big Apple, Woking
7	Ascot	Ascot	Woking	Esher	Other - outside catchment area	Bowlplex - The Atrium, Park Street, Camberley
8	Weybridge	Weybridge	Woking	Weybridge/ Woking	Other - outside catchment area	Guildford Spectrum - Parkway, Guildford

### *Cafes, Pubs and Bars*

- 5.48 65.6% of the households surveyed stated that they visited pubs, bars or nightclubs. Woking (11.8%) and Guildford (8.3%) are by far, the most popular destinations for pubs, bars or nightclubs. They are followed by Weybridge (4%) and Camberley (3%).

### *Cinemas and Theatre*

- 5.49 73% of those interviewed visit the cinema or theatre. The most popular cinema destinations are Woking (35%), Guildford (8.8%), Camberley (7.4%) and Staines (6%).

### *Bingo/Casinos/Bookmakers*

- 5.50 94.3% of respondents claim not to undertake activities which involve gambling, such as visits to bingo halls, casinos and bookmakers. Of those that do participate, Woking is again the most popular location.

### *Health and Fitness Centres*

- 5.51 70.9% of respondents claim not to undertake health and fitness activities and the majority that do participate use facilities outside of the borough which is surprising since there is a range of facilities within the borough. The following were cited as the most popular destinations for health and fitness outside of the Woking Borough; the Arena Leisure Centre in Camberley, The Spectrum in Guildford and, Elmbridge and Lightwater Leisure Centres.

### *Family Entertainment Centres (i.e. Ten Pin Bowling, Skating and so on)*

- 5.52 67.4% of respondents claim not to visit family entertainment centres such as ten pin bowling alleys and skating rinks. However, the Guildford Spectrum in Guildford is the dominant location for this activity. There are also a bowling alley and lazer quest within the Big Apple in Woking town centre but this is only the most popular location for residents of zone 6.

## **Conclusions in Relation to Retail & Leisure Spending Patterns**

### *Comparison Goods Spending*

- 5.53 Overall, some 52.4% of the comparison goods expenditure of the residents of the catchment area is retained by town centres, retail parks and freestanding stores located within the catchment. The main destinations within the catchment area are: Woking town centre, which secures £306.3 million of the residents' comparison goods expenditure, Weybridge (£62 million) and Addlestone (£48.8 million).
- 5.54 Short-distance leakage to places like Guildford, Camberley, Farnborough and Kingston town centre account for 65.3% of the residents' comparison goods expenditure.
- 5.55 Woking secures an unopposed dominant comparison goods market share in excess of 40% in zone 1b. Although it secures a market share in excess of 40% in a further two zones, it faces subsidiary competition in these zones from Guildford which has a market share in the range 10% to 39%.
- 5.56 For five of the survey zones, to the north, east and west of the study area there is no dominant comparison goods centre.

### *Convenience Goods Spending*

- 5.57 Overall, 28.2% of the convenience goods expenditure of residents of the overall catchment area is retained by town, district and local centres and freestanding stores located with the study area.
- 5.58 The household survey suggests that there has been a continuing polarisation in the convenience goods sector, in that the stores located within the catchment area now account for 75.85% of the aggregate convenience goods expenditure of the residents of the catchment area. However, six of the 11 zones lack a 'dominant' superstore which is defined as having a convenience goods market share in excess of 30%.
- 5.59 The highest individual market shares are achieved by Sainsbury's in Brookwood, Tesco Extra in Weybridge, Sainsbury's in Guildford and Tesco Extra in Addlestone. However, in seven zones of the catchment area there is a localised deficiency in convenience goods provision; these are the zones 1a, 1c, 3a, 4, 7 and 8. In these zones the localised convenience goods retention rate is between 10% and 30%.

### *Leisure Services Spending*

- 5.60 Woking and Guildford are by far the most important locations for spending on leisure services. Other important locations include West Byfleet, specifically for residents of zone 2, Camberley for residents of zone 4, Addlestone for residents of zone 6, Ascot for residents of zone 7 and Weybridge for residents of zone 8.
- 5.61 The majority of people who participate in health and fitness use facilities outside of the borough. This suggests a need for facilities to be located within the borough



## 6 RETAIL NEED

### Introduction

- 6.1 We turn now to our assessment of the quantitative and qualitative needs likely to arise in the retail and leisure sectors in the period up to 2021 and, more indicatively, for the further period from 2021 to 2026. Longer term projections are more 'indicative' because of the exponential shape of the expenditure growth graph and because PPS6 enshrines the need to plan, monitor and manage. In undertaking the assessment of retail and leisure needs, we have followed the guidance set out in paragraphs 2.32 to 2.37 of PPS6. We deal first with quantitative retail need, taking the class of goods approach to the assessment, as required by paragraph 2.34 of PPS6.

### Methodology for Assessing Quantitative Retail Need

- 6.2 Our assessment of quantitative need for comparison and convenience goods adopts the widely respected step by step methodology, which is consistent with CLG's 'Living Draft' GPG. The essential steps in the assessment of quantitative retail need are as follows:
- **Step 1:** establish an appropriate catchment area for the highest order town centre being considered, in this case Woking, which can be used as a study area for the assessment;
  - **Step 2:** assess the existing level of population and existing volume of retail expenditure of those resident within the study area, deducting an appropriate proportion for Special Forms of Trading (SFT);
  - **Step 3:** apply forecasts of population change and per capita expenditure growth, in order to establish the overall level of projected growth in expenditure for residents of the study area;
  - **Step 4:** establish where the expenditure of the residents of the study area is currently spent, through use of an empirical survey of households resident in the study area (as discussed in Section 5), and thereby establish the proportion of expenditure which is currently retained by town centres and freestanding stores located within the borough - that is the current retention rate;
  - **Step 5:** make an allowance for under-trading or over-trading in the base year, if this is justified on the basis of circumstances identified by the Court of Appeal in its Kiddington judgment (The First Secretary of State and Another and Sainsbury's Supermarkets Ltd, 6 May 2005, Case No C3/2004/1658);
  - **Step 6:** make allowance for 'claims' on the growth in retained expenditure as a result of:
    - floorspace efficiency change (that is the growth in turnover for existing retailers within existing floorspace);
    - commitments to new floorspace (either schemes under construction or extant permissions that would result in additional retail floorspace);
  - **Step 7:** calculate the initial residual expenditure pot which is potentially available for new retail floorspace under a constant market share scenario, based on steps 2-6 above and convert this expenditure to floorspace requirements;

- **Step 8:** develop alternative scenarios for calculating growth in residual expenditure, including applying sensitivity assessments if appropriate.

6.3 Our assessment of quantitative need is set out in the Tables 1-16 as reproduced in **Appendix 8**. We refer to these tabulations within the text and where necessary draw out the main findings within tables within the report itself.

#### *Step 1: Definition of the Study Area*

6.4 The study area was defined on the basis of the approach described in Section 5 of our report, and split into 11 zones based on postcodes. All 11 zones are used as the study area for the comparison and convenience goods assessment. The postcode sectors are listed at Table 1 (**Appendix 8**).

#### *Step 2: Existing Level of Population and Expenditure*

6.5 The population by zone in the 2009 base year is set out in Table 2 (Appendix 8). The data is based on 2006 zonal population figures supplied by MapInfo and rolled forward to 2009 using population projections supplied by the Office for National Statistics Mid-year Population Estimates 2007 with the exception of zones 1A - 2 inclusive where the SCC borough wide projections for the Council are applied.

6.6 The zonal per capita expenditure data is supplied by MapInfo for the year 2006 (Table 3 and 9, Appendix 8 for comparison and convenience goods respectively). The data is then rolled forward to 2009 first using an observed growth rates from 2006.

6.7 The existing expenditure in 2009 is derived from the product of Tables 2 and 3 for comparison goods and Tables 2 and 8 for convenience goods (Appendix 8). Thus, the 2009 expenditure pot, excluding SFT, is set out in Table 4 for comparison goods and in Table 10 for convenience goods.

6.8 In excluding SFT, we have relied on the advice provided in Table 5.1 of Experian's Retail Planner Briefing Note 6.1. However, in the convenience sector, we have halved the proportions of expenditure accounted for by SFT so as to reflect the fact that a proportion of the convenience goods bought over the internet are still supplied from shelves in supermarkets, rather than from distribution warehouses, as is more often the case in the comparison goods sector.

6.9 The total comparison expenditure in the study area in 2009 (excluding SFT) is £1,418.6 million (final column of Table 4) and the total convenience expenditure is £724.1 million (final column of Table 10).

#### *Step 3: Growth in Expenditure and Growth in Retained Expenditure*

6.10 The next steps are to apply forecasts of population change and per capita expenditure growth, in order to establish the overall level of projected growth in expenditure for all residents of the study area.

6.11 Population change is based on the Office for National Statistics Mid-year Population Estimates 2007 and SCC projections, as set out in Table 2, Appendix 8 and explained in the preceding paragraph. The data on growth in per capita expenditure is as set out in



Table 3 for comparison goods and Table 9 for convenience goods, utilising the forecast growth rates to 2011, 2016, 2021 and 2026.

- 6.12 **Appendix 10** includes information on national retail trends and sets out the rationale for our expenditure growth rates. For comparison goods we adopt 1.8% per annum to 2016, 5.9% per annum from 2016 to 2021 and 4.3% per annum from 2021 to 2026. For convenience goods we adopt 0.2% per annum to 2016, 0.9% per annum from 2016 to 2021 and 0.5% per annum from 2021 to 2026. These growth rates are rounded.
- 6.13 As explained above, in excluding SFT, we have relied on the advice given in Table 5.1 of Experian's Retail Planner Briefing Note 6.1. The deductions for SFT are set out in Table 6.1 below.

**Table 6.1 Projected Growth in Special Forms of Trading (SFT)**

Year	Comparison Goods		Convenience Goods	
	%	Source	%	Source
2009	12.2	Experian	3.3	Experian x 0.5
2011	13.4	Experian	3.7	Experian x 0.5
2016	13.9	Experian	4.1	Experian x 0.5
2021	13.9	Experian	4.1	Experian x 0.5
2026	13.9	Experian	4.1	Experian x 0.5

- 6.14 The final row of Table 4 (Appendix 8) sets out the total growth in comparison goods expenditure up to 2026 of £1,481.5 million. Similarly the final row of Table 10 (Appendix 8) sets out the total growth in convenience goods expenditure up to 2026 of £151.1 million. For comparison goods, it is appreciated that this is a significant quantum of expenditure growth, thus we undertook sensitivity testing at Step 8 of this process.

#### *Step 4: Existing Retention Rate for Woking*

- 6.15 The next step is to use the household survey findings to establish current patterns of expenditure and the current retention rate for the borough, as described in Section 5 of our report. Thus, the current pattern of expenditure and current retention rate for comparison goods, excluding SFT, is as set out in Tables 5 and 6 (Appendix 8), with the overall retention rate for comparison goods being 28.2% (as set out in the final column of Table 5 under the row entitled 'Sub-total inside Woking Borough').
- 6.16 For convenience goods, the pattern of expenditure and current retention rate, excluding SFT, is as set out in Tables 11 and 12 (Appendix 8), which co-incidentally reveals a convenience goods retention rate of 28.2% (see the final column of Table 12, in the final column of the 'Sub-total inside Woking Borough' row), which is identical to the comparison retention rate.
- 6.17 It is appreciated that that there will be further comparison expenditure trade to Woking from beyond the study area. This represents an additional source of expenditure growth that is not initially accounted for. Whilst we consider the study area is an appropriate comparison goods catchment for Woking, the visitor survey revealed approximately 15% of those questioned travelled to the centre from beyond the study area. Thus we have allowed for 15% of Woking's turnover to be derived from inflow expenditure. Similarly, we have allowed for 5% inflow for both the Lion Retail Park's and Sainsbury's/Homebase

turnover. The inflow assumptions are reflected in Table 7, Appendix 8, where we assess the trading performance of stores described in Step 5.

- 6.18 We have not allowed for any convenience inflow expenditure, since convenience shopping is a much more localised activity and we find no justification to plan on the basis of convenience expenditure travelling long distances to the borough from beyond the study area boundary.

### *Step 5: Adjustments for Under-trading/Over-trading in the Base Year*

#### *Comparison Goods Sector*

- 6.19 In order to assess whether there is any under-trading or over-trading in the borough, we must assess the existing sales density (turnover per sqm) of the floorspace and compare this with what would be expected of these centres given the composition of the retail provision and their position in the shopping hierarchy. Table 6.2 sets out the sales densities for the main comparison shopping destinations in the borough.

**Table 6.2 Comparison Goods Sales Densities in 2009**

Centre	Turnover (£ million) (2009)	Net Comparison Floorspace (sqm)	Sales density (£ per sqm net)
Woking	340.3	50,213	6,777
West Byfleet	17.0	2,078	8,159
Knaphill	18.4	1,535	11,977
Lion Retail Park	25.5	6,610	4,059
Redding Way, Knaphill	13.4	4,328	3,254

Source: Table 7, Appendix 12

- 6.20 Woking achieves a comparison sales density of £6,777 per sqm net. This is at the high end of what we would expect from a centre of Woking's status in the hierarchy. However, it is acknowledged in CLG's GPG that household surveys have a tendency to overestimate the turnover of larger centres. Furthermore, we expect that any change in trading patterns resulting from the closure of some high profile comparison operators in Woking (such as Marks and Spencer) would not have been fully reflected within the household survey responses, although the floorspace we have used excludes these stores since they are now vacant.
- 6.21 Knaphill has a particularly high sales density of £11,977 per sqm net. Despite our healthchecks revealing a positive picture, this level of performance is surprising and we consider that it isn't plausible in light of the composition of Knaphill's comparison offer. The likely reason for this trading performance is that respondents to the household survey answering that they visit either the out of centre Sainsbury's or Homebase at Redding Way when undertaking some of their comparison shopping. Despite this point, even if we allow 50% of Knaphill's turnover being spent at Redding Way, there is evidence Knaphill is performing well.
- 6.22 The comparison turnover of West Byfleet is lower than Knaphill but still results in a high sales density of £8,159 per sqm net. Again this is higher than what we would expect, but

sales densities are sensitive to changes in floorspace and shopping patterns can often take over a year to fully catch up (i.e. people may not consciously notice their shopping patterns have changed and thus the results in the household survey may not be fully up to date). Therefore, the likely reason for the relatively high sales density for West Byfleet is the closure of the Woolworths store which has lowered the overall comparison floorspace in the centre.

- 6.23 In respect of the out of centre locations, the Lion Retail Park is achieving a turnover of £4,060 per sqm net, which is broadly in line with what we would expect. Sainsbury's/ Homebase in Redding Way is achieving a turnover of £3,254 per sqm net. As explained above, we consider some turnover that is spent in this destination is shown as being spent in Knaphill itself. Indeed, although this turnover is similar to what we would expect for Homebase, the comparison element at Sainsbury's would normally achieve a higher turnover.
- 6.24 Although at the margin, there is evidence of overtrading, this is influenced by recent vacancies and some minor anomalies with the survey data. In addition, there is no accepted 'benchmark' for comparison shopping. Therefore, overall, we find no justification to make any adjustment in the base year to account for overtrading as an additional source of comparison expenditure to support new floorspace.

#### *Convenience Goods Sector*

- 6.25 The approach to the convenience goods expenditure is slightly different, because there is published data on average (or benchmark) turnover for the main foodstore operators. For the stores that attract a notable market share, we have assessed the survey derived turnover against the benchmark, as summarised in Table 6.3.

**Table 6.3 Convenience Sales Densities in 2009**

Zone	Main Foodstores within Woking	Net Floorspace - Convenience Goods Only (sqm)	Average Sales Density (£ per sqm)	Benchmark Turnover (£m)	Survey Derived Turnover 2009 (in £m)	Under /Over Trading (in £m)
1A	Morrisons, Goldsworth Road, Woking	2,843	12,321	27.0	48.3	21.4
1A	Sainsbury's, Wolsely Walk, Woking	1,159	10,770	9.0	12.8	3.8
1B	Co-op, High Street, Knaphill	262	6,920	1.6	2.2	0.5
1B	Sainsbury's, Redding Way, Knaphill	4,715	10,770	38.1	64.8	26.7
1B	Waitrose, Goldsworth Park, Woking	1,508	12,711	16.5	19.8	3.3
2	Waitrose, West Byfleet	1,562	12,711	17.1	24.8	7.7
<b>TOTAL</b>				<b>109.2</b>	<b>172.7</b>	<b>63.5</b>

- 6.26 The analysis, which is set out in Table 6.3 reveals that Morrisons in Woking and Sainsbury's in Brookwood are trading substantially above the company average and that no other foodstore with notable market shares within the borough is currently undertrading. The Waitrose in West Byfleet is overtrading by more than 7.5%. The Waitrose at Goldsworth Park and the Co-op in Knaphill are trading in line with expectations but are still above average.
- 6.27 However, overtrading is a contentious issue and there are mixed views as to whether it can be used to support a quantitative need case and our research often shows larger stores to be overtrading. Indeed, statements about 'overtrading' or 'under-trading' are contentious since information from several leading operators' shows that there is considerable variation around their company averages for convenience sales densities. It is not unusual for individual stores to trade at 20% to 30% above or below the company average, and a few stores trade at 100% or more above the company average. These variations can occur because of factors like efficient management or attractive store design and not just lack of competition.
- 6.28 In addition, there is the acknowledged feature of household surveys that they overestimate the turnover of larger superstores compared to the smaller stores. For example, most respondents are able to give meaningful information about the supermarkets they use but the remaining elements of convenience shopping are much more complex. They include:
- Purchases of foodstuffs from butchers, bakers, fishmongers and greengrocers.
  - Purchases of alcohol from wine merchants and other off-licences.

- Purchases of newspapers, magazines, tobacco and confectionary from local newsagents.
- Purchases of general convenience goods from local shops, including fuel stations

6.29 Whilst our survey design sought to mitigate any bias, there is potential that the survey over the reality of the position estimates the turnover of these larger stores vis-à-vis smaller stores. Therefore, as a 'sanity check', we have assessed the performance of the other smaller stores in the borough, which are currently attracting an aggregate turnover of £31.8 million. This exercise is undertaken in Table 6.4.

**Table 6.4 Turnover of Smaller Stores in the borough**

	Net Convenience Floorspace (sqm)	Turnover (£m)	Sales Density (£ per sqm)
Smaller Stores (excluding those in Table 6.3)	1,073	-	-
Net Convenience Floorspace of Woking West Byfleet and Knaphill	2,414	-	-
<b>Total</b>	<b>3,488</b>	<b>31.8</b>	<b>9,128</b>

Source: 90% of the smaller stores is assumed to be convenience goods and the net convenience floorspace of Woking, West Byfleet and Knaphill is achieved by applying a ratio of 65% to the gross floorspace.

6.30 If we assume that 100% of the £31.8 million is spent in the floorspace outlined in Table 6.4, then the sales density of this other floorspace will be £9,128 per sqm. This is similar to what one of the large foodstore operators will achieve. However, we know that the figures in Table 6.4 do not capture all the convenience floorspace in other smaller local centres or petrol filling stations, which would lower the sales density to something more plausible for this type of floorspace (i.e. between £3,000 to £4,000 per sqm net) Thus, we consider that the turnover devoted to small stores is an appropriate level. This therefore gives credence to overtrading of the larger stores.

6.31 In aggregate the benchmark turnover of the main foodstores exceed the turnover according to our survey. Thus, as explained at Step 7 we adjust the equilibrium position in the base year for convenience goods assessment to allow for overtrading. This will increase the available expenditure for the borough and the floorspace requirements. Given the amount that the convenience stores with a noticeable market share are currently over trading by, we consider that the provision of new convenience floorspace should be incorporated into future plans. This would relieve the overtrading and, promote competition and choice within the borough.

### *Step 6: 'Claims' on Growth in Retained Expenditure*

6.32 The next step is to make an allowance for 'claims' on the growth in retained expenditure. We have already allowed for the growth in SFT, as explained in Step 3 above. The remaining 'claims' are:

- growth in floorspace efficiency, which is growth in the turnover of existing retailers within their existing floorspace; and

- an allowance for the turnover absorbed by planning commitments.
- 6.33 In making an allowance for growth in floorspace efficiency we have allowed:
- 0.7% per annum to 2016, 2.2% per annum to 2021 and 1.6% per annum to 2026 in the comparison goods sector; and
  - 0.2% per annum to 2016, 0.6% per annum to 2021 and 0.3% per annum to 2026 in the convenience goods sector.
- 6.34 The effect of the gain in floorspace efficiency of existing retailers amounts to a 'claim' of £116 million in the comparison goods sector (final column row F of Table 8, Appendix 8). The corresponding effect in the convenience goods sector amounts to £12 million (final column row F of Table 14).
- 6.35 The next step is to allow for the future turnover requirements of planning commitments, having made an assessment of how much the commitments' turnovers will be derived from residents of the overall catchment area. The comparison good commitments are scheduled in Table 6.5 and the convenience goods commitments are scheduled in Table 6.6; the aggregate turnover of the comparison commitments are shown under rows 16-18 in Table 8, and convenience commitment is shown in row G in Table 14 (Appendix 8).

**Table 6.5 Comparison Retail Commitments within the Woking borough**

<b>Scheme</b>	<b>Gross Sales Area (sqm)</b>	<b>Net Sales Area (sqm)</b>	<b>Assumed Density in 2011 (£ per sqm)</b>	<b>Comparison Turnover at 2011 (£m)</b>
Guildford Road, Woking	636	477	5,145	2.5
Station Approach, West Byfleet	103	77	5,145	0.4
<b>TOTAL</b>	<b>739</b>	<b>554</b>		<b>2.9</b>

Notes: net to gross ratio is assumed to be 75%. Sales densities are RTP assumptions based on the type of floorspace proposed.

**Table 6.6 Convenience Retail Commitments within Woking Borough**

<b>Scheme</b>	<b>Gross Sales Area (sqm)</b>	<b>Net Sales Area (sqm)</b>	<b>Assumed Density in 2011 (£ per sqm)</b>	<b>Convenience Turnover at 2011 (£m)</b>
Sainsbury's extension, Redding Way, Knaphill	-	1,698	5,385	7.0
<b>TOTAL</b>	<b>-</b>	<b>1,698</b>		<b>7.0</b>

Notes: The sales densities are based on 50% of the Sainsbury's Retail Rankings (2009) turnover.

- 6.36 We have assumed that all commitments will be open and trading by 2011. We have allowed for an increase in sales density as per the existing floorspace. This means that the claim on comparison commitments in 2026 is £3.6 million and for convenience goods, the claim for commitments in 2026 is £7.4 million.

### ***Step 7 Residual Expenditure Potentially Available for New Floorspace***

- 6.37 For comparison goods, Row H of Table 8 (Appendix 8) sets out the residual expenditure pot potentially available for new floorspace, having allowed for all of the claims on the growth in retained expenditure - that is, growth over time in SFT, growth in floorspace efficiency and commitments. Rows I to K Table 8 converts the comparison goods residual expenditure to a floorspace requirement expressed as a net sales area, having applied an average sales density for comparison goods of £5,145 per sqm sales area in 2011, increased to £6,424 per sqm in 2026. This is then converted to a gross requirement using a net to gross ratio of 75%.
- 6.38 For convenience goods, we have adopted two approaches. Firstly without allowing for overtrading (residual expenditure is shown at Row H of Table 14a, Appendix 8) and secondly when overtrading is built into the assessment (residual expenditure is shown at Row I of Table 14b). When we convert the expenditure to floorspace requirements, we use a sales density for superstores/supermarkets of £12,800 per sqm in 2009, increasing to £13,552 per sqm in 2026. For smaller foodstores/deep discounters, we apply a sales density of £5,600 per sqm in 2009, increasing to £13,552 per sqm in 2026.
- 6.39 Rows D to F and G to I (Tables 15a and 15b, Appendix 8) convert the residual expenditure into floorspace requirements, allowing for 30% to be spent in small stores/deep discounters and 70% to be spent in superstores/supermarkets. The net floorspace is converted to a gross requirement using a net to gross ratio of 65%, which is higher than comparison goods on the basis that foodstores need more storage space than comparison outlets.
- 6.40 It should be noted that the sales densities are averages and should a trading format be promoted that achieves a different typical turnover, then the floorspace outputs can be adjusted accordingly.

### ***Step 8: Scenario Testing and Sensitivity Assessment***

#### ***Scenario Testing: Comparison Goods Sector***

- 6.41 Firstly, we must assess the overall retention level of the borough's centres within the study area. This aggregate retention level of the borough's centres is 28.2%. Of this, Woking itself achieves a retention rate of some 21.6%. Although the market share of Woking could be improved in zones 3A, 3B, 4, 7 and 8, this is only likely to happen in zones 7 and 8 where there is no one dominant centre within or in close proximity to the zones. The close proximity of Guildford, Bracknell and Camberley within the other zones makes it more difficult for Woking to improve its market share.
- 6.42 We expect there is scope for Woking to achieve an improvement in market share in the short term; however this is likely to be offset through competing developments elsewhere in sub-region in the plan period. In summary, over the study timeframe we have maintained constant market shares, which is a policy neutral approach although this does not mean that floorspace can be delivered earlier in the plan period to respond to competition.

*Sensitivity Testing: Comparison Goods Sector*

- 6.43 In order to reflect changing economic circumstances in the UK and the uncertainty over empirical assumptions, we have undertaken a sensitivity assessment under the three approaches:
  - Increased SFT: we have increased SFT to 18% of expenditure in 2021 and to 22% by 2026.
  - Cautious Growth: we have increased expenditure growth by 1.3% per annum to 2016, 5.6% per annum to 2021 and 3.9% per annum to 2026.
  - Increased SFT and Cautious Growth (a combination of the first two bullet points)
- 6.44 The outputs of the sensitivity assessment (in terms of residual expenditure) are summarised in Table 6.7, alongside our base approach.

**Table 6.7 Comparison Goods Sensitivity Analysis**

	2016 (£m)	2021 (£m)	2026 (£m)
Base Assessment	50.9	189.5	336.5
Increased SFT	50.9	156.0	252.5
Cautious Growth	33.2	156.7	280.3
Increased SFT/Cautious Growth	33.2	124.9	201.8

- 6.45 Clearly, residual expenditure (and thus floorspace capacity) is highly sensitive to empirical forecasts and there are numerous permutations to the above exercise. The forecasts used in our base assessment is our preferred approach to quantitative need since these are based on published sources and are widely respected in the industry. However, in order to ensure the Council benefits from a robust evidence base, it is important to ensure regular monitoring of such assumptions and we provide advice on our recommended approach to monitoring in Section 9.

*Convenience Goods Sector*

- 6.46 In the convenience sector we adopt a different approach. The aggregate level of retention shown in 75.8% - is already high and there is no case either for increase. Furthermore, the retention level of zones A to Z inclusion is over 80%. However, we have built in two forms of scenario testing within the assessment, in particular testing the position with and without overtrading and dividing the requirements into a superstore/supermarket requirement and a small foodstore/deep discounter requirement.

**Findings in Relation to Quantitative Retail Need**

*Comparison Goods Sector*

- 6.47 Table 8 (Appendix 8) summarises the quantitative need for additional floorspace in the borough. These quantitative needs are summarised in Table 6.8 and represent gross requirements presented on a cumulative basis.



**Table 6.8 Quantitative Need in the Comparison Goods Sector (sqm gross)**

	<b>Gross Comparison Floorspace Requirement</b>
2011	2,138
2016	12,749
2021	42,573
2026	69,828

- 6.48 The quantitative assessment shows that there is a significant requirement for comparison floorspace to the period 2026. After 2016, there is a sharp increase in floorspace requirements, which is a function of the compound effect of per capita expenditure growth over this timeframe combined with population growth. Whilst we advise caution against the scale of floorspace requirements post 2021, it is clear that the aggregate requirement is likely to be significant and we consider there is sufficient expenditure to support a further large scale shopping development in Woking to open between 2016 and 2021 to meet the expenditure growth for this period.

### *Convenience Goods Sector*

- 6.49 Tables 15a and 15b at Appendix 8 set out the quantitative convenience goods retail need for constant market shares with and without overtrading. We have two sets of requirements, for both superstores/supermarkets and small foodstores/deep discounters. These requirements are summarised in Table 6.9 and Table 6.10.

**Table 6.9 Quantitative Need for Superstores/Supermarkets (sqm gross)**

	<b>Gross floorspace requirement</b>	<b>Gross Floorspace Requirement (including overtrading)</b>
2011	-353	4,998
2016	285	5,586
2021	1,138	6,285
2026	1,849	6,917

**Table 6.10 Quantitative Need for Small Foodstores/Deep Discounters (sqm gross)**

	<b>Gross convenience floorspace requirement</b>	<b>Gross Comparison Floorspace Requirement (including overtrading)</b>
2011	-346	4,886
2016	279	5,472
2021	1,115	6,157
2026	1,812	6,776

- 6.50 The above tables show there to be a modest requirement for superstores/supermarkets (circa 1,800 sqm to 2026) and small foodstores/deep discounters (circa 1,800 sqm to 2026). However, as we have explained in previous sections, there is clear evidence of overtrading of the larger foodstores and we recommend that the overtrading be built into the capacity assessment for the borough.

## Qualitative Retail Need

6.51 Paragraphs 2.35 to 2.37 of PPS6 provide advice on the considerations LPAs should take into account in assessing qualitative needs in their development plan documents. Paragraph 2.35 states that the key consideration for an LPA is to provide for consumer choice, by ensuring that:

- an appropriate distribution of locations is achieved, subject to the sequential approach; and that
- provision is made for a range of sites for shopping, leisure and local services so as to allow for genuine choice and meet the needs of the whole community, particularly in deprived areas.

### *Comparison Goods Sector*

6.52 In the comparison goods sector, the over-riding requirement is to improve the quality of Woking town centre's offer vis-à-vis competing centres. This is particularly so in relation to Guildford which is identified as Centres of Significant Change within the SEP and Kingston, which is a Metropolitan Centre in the London Plan.

6.53 We have noted, in Section 3 that Woking town centre achieves only a 'middle' rating for fashion in MHE's Shopping Index. The data used for the demand survey and presented in the table below, shows that there are a number of retailers that operate in Kingston and/or Guildford but not in Woking town centre. The absence of such retailers in Woking encourages shoppers to visit Guildford and Kingston instead.

**Table 6.11 Multiple Representation Comparison Sector**

<b>Retail Operator</b>	<b>Guildford</b>	<b>Kingston</b>
Ann Summers	Yes	Yes
Austin Reed	Yes	
Aveda	Yes	
Babygap	Yes	Yes
Bang & Olufsen	Yes	Yes
Base		Yes
Bathstore.Com	Yes	
Beachworks		Yes
Bead Time		Yes
Bentalls		Yes
Best One		Yes
Borders		Yes
Build A Bear Workshop		Yes
Carluccios		Yes
Carvela	Yes	
Castle Studios	Yes	
Cath Kidston	Yes	Yes
Coast		Yes
Cotswold Company	Yes	

<b>Retail Operator</b>	<b>Guildford</b>	<b>Kingston</b>
Cotton Traders	Yes	
Crabtree & Evelyn	Yes	Yes
Dolcis		Yes
Dune		Yes
E Owen	Yes	
East	Yes	Yes
Ecco	Yes	
Eden		Yes
Envy		Yes
Essence		Yes
Essentials	Yes	
Fat Face	Yes	Yes
Featherstone Leigh		Yes
Fired Earth	Yes	Yes
Free Spirit	Yes	Yes
French Connection	Yes	Yes
Frere Jacques		Yes
Gap	Yes	Yes
Gapkids	Yes	Yes
Ghost		Yes
H & M	Yes	Yes
Habitat	Yes	Yes
Heals	Yes	Yes
Hobbs	Yes	Yes
House Of Fraser	Yes	
Hugo Boss		Yes
Ikon	Yes	
Jacques Vert*	Yes	Yes
Jaeger	Yes	
Jigsaw	Yes	Yes
Jo Malone	Yes	
John Lewis		Yes
Jones	Yes	Yes
Kaliko	Yes	
Karen Millen	Yes	Yes
Kew	Yes	Yes
L K Bennett	Yes	
L`Occitane	Yes	Yes
Laura Ashley	Yes	Yes
Leslie Davis	Yes	Yes
Lom Bok	Yes	Yes
Lush	Yes	Yes

<b>Retail Operator</b>	<b>Guildford</b>	<b>Kingston</b>
Maison Blanc	Yes	
Moda In Pelle	Yes	
Molton Brown	Yes	
Moss	Yes	Yes
Neals Yard Remedies	Yes	Yes
Oasis*		Yes
Octopus		Yes
Office		Yes
Paperchase	Yes	Yes
Phase Eight	Yes	
Reiss	Yes	Yes
Russell & Bromley	Yes	Yes
Scribbler		Yes
Sunglass Hut	Yes	Yes
Swarovski	Yes	Yes
Sweaty Betty		Yes
Ted Baker	Yes	
The White Company	Yes	
Uniqlo		Yes
United Colors Of Benetton		Yes
Viyella	Yes	
Voodoo Lounge	Yes	
Wallis	Yes	Yes
Warehouse*	Yes	Yes
Watch Station	Yes	
Zara	Yes	Yes
<b>Total</b>	<b>62</b>	<b>61</b>

\*concession store within Debenhams, Woking.

- 6.54 One of the most important qualitative deficiencies in Woking is the lack of a second department store, which was an issue raised in the DTZ study. Debenhams is a well used department store and anchors the Peacocks centre. However, Marks and Spencers has recently closed and although this was small compared to some of its other stores, it was an important anchor store. Importantly, centres such as Kingston and Guildford both have two department stores, plus large Marks and Spencers. We consider this is an acute qualitative deficiency in Woking and should be addressed.
- 6.55 We have also identified a qualitative requirement to improve the quality of the retail offer in West Byfleet since it ranking has been steadily declining in recent years.

### *Convenience Goods Sector*

- 6.56 In the convenience sector, it is clearly important that needs are met on as localised basis as possible, so that an important part of the LDF process is to remedy deficiencies in local shopping and other essential services facilities, so as to assist in reducing social

exclusion (paragraphs 2.55 to 2.58 of PPS6). Since there is evidence of the dominance of larger foodstores, such as Morrisons in Woking, Sainsbury's at Brookwood and Tesco Extra at Brooklands and that these stores are overtrading, we consider there is qualitative need to improve choice within the town centres and encourage linked trips.

6.57 We are aware of interest in Woking of foodstore operators that are not currently represented in the borough, in particular a further large foodstore operator could be accommodated within the borough. In addition, our demand survey has revealed demand from Lidl (one of the three deep discounters) seeking space in the borough. Therefore, we consider there is a clear qualitative need to improve choice through the accommodation of additional operators, although these should be directed to town or edge of centres sites in order to improve linked trips and temper the existing dominance from out of centre stores.



## 7 NEED IN THE LEISURE SECTOR

### Introduction

- 7.1 This section consists of an assessment of the quantitative and qualitative needs likely to arise in the leisure sector in the period up to 2026. In undertaking this analysis, we have followed the guidance set out in paragraphs 2.32 to 2.37 of PPS6. However, it is important to note the caveat inherent in assessing this sector, namely that the techniques used to determine leisure needs are not as well developed as those utilised in assessing retail needs. Nevertheless, despite this limitation, we use practical resources and effective methodologies to assess this sector for the borough as robustly as possible. Our assessments are included at Tables 16 to 20 in **Appendix 12**.

### Leisure Expenditure Growth

- 7.2 Presently, there is a lack of industry-standard methodologies for modelling and apportioning growth in leisure expenditure. However, it is still possible to forecast and allocate leisure expenditure using alternative approaches. MapInfo provides data on per capital leisure expenditure in Classification of Individual Consumption by Purpose (COICOP) categories. We use this resource and apply a simple approach to determine a broad level of demand and scope for additional leisure facilities in the borough. We begin by considering the current breakdown of leisure expenditure by COICOP in the study area as shown in Table 7.1.

**Table 7.1 Breakdown of Leisure Spend in Study Area (2009)**

COICOP Categories	Description	Total Expenditure (£m)	% of Total Leisure Services Spend
11.1.1	Restaurants, cafés, bars, etc	504.1	59.2%
9.4.2	Cultural services	99.3	11.7%
9.4.3	Games of chance	61.6	7.2%
11.2	Accommodation services	102.1	12.0%
9.4.1	Recreational and sporting services	46.8	5.5%
12.1.1	Personal services (hairdressers, etc.)	37.7	4.4%
<b>TOTAL 'LEISURE SERVICES' SPEND</b>		<b>851.7</b>	<b>100%</b>

- 7.3 The table shows that total spend on leisure services per capita in the study area amounts to £851.7 million, of which more than half accrues to spending on 'restaurants, cafés, bars, etc.' (59.2%). The second highest leisure expenditure is on 'accommodation services' (12.0%) which is closely followed by spending on 'cultural services' (11.7%). Expenditure on cinema and theatre tickets, a sub-category of 'cultural services,' accounts for 2% of overall spend per capita. 'Games of chance,' 'recreational and sporting services' and 'personal services' have a 7.2%, 5.5% and 4.6% share, respectively, of total spend. Betting accounts for the greatest proportion of 'games of chance' expenditure (36.5% in 2007, according to the Leisure Industries Research Consultancy).

- 7.4 Apportioning leisure expenditure in the COICOP categories provides us with the structure of current expenditure on leisure activities. We are able to use this current structure to calculate the growth in leisure spending by residents of the study area in the period 2009-2026. The projected growth in expenditure on leisure services is set out in Table 16 (Appendix 8) using Experian's recommended growth rate for spending on leisure services of 0.8%, per capita, per annum for the period 2009 to 2026.
- 7.5 As can be observed on Table 17, **Appendix 8**, *total* expenditure on leisure services is projected to increase from £851.7 million in 2009 to £877.1 million in 2011 in the study area. This figure further rises to £941.0 million in 2016 and then to £1,007.3 million in 2021. In 2026, it is estimated that approximately £1,075.9 million will be spent on leisure services by residents of the study area. This figure represents 26% growth in leisure expenditure between 2009 and 2026, more than twice the growth projected for population which is expected to increase by 12% over the same period.
- 7.6 Turning to absolute growth, the overall growth in expenditure in leisure services over 2009-2026 is estimated to be £224.2 million. In Table 7.2 we apply the current proportions of leisure spend to determine the expected change in each COICOP category.

**Table 7.2 Allocating growth in spending by COICOP categories**

COICOP Categories	Description	Allocating additional spend of £224.2, 2009-26 (£m)
11.1.1	Restaurants, cafés, bars, etc	132.7
9.4.2	Cultural services	26.2
9.4.3	Games of chance	16.2
11.2	Accommodation services	26.9
9.4.1	Recreational and sporting services	12.3
12.1.1	Personal services (hairdressers etc)	9.9
<b>TOTAL 'LEISURE SERVICES' SPEND</b>		<b>224.2</b>

- 7.7 Spending on 'restaurants, cafés, bars, etc' is expected to increase by £132.7 million, the highest expenditure category. Expenditure on 'accommodation services' and 'cultural services' is forecasted to be approximately £26.9 million and £26.2 million, respectively, based on current spending proportions. Of the total growth figure, approximately £2.4 million is expected to be consumed by spending on cinemas and theatre admissions. The remaining growth is to be absorbed by 'games of chance' (£16.2 million), 'recreational and sporting services' (£12.3 million) and personal services (£9.9 million).

## Assessment of Commercial Leisure Requirements

- 7.8 Based on the forecasts above, we can now determine the requirements for some of the main expenditure categories. We combine quantitative results with a qualitative perspective to assess the status of existing provision and highlight the need for further facilities where possible.



### *Food and Drink*

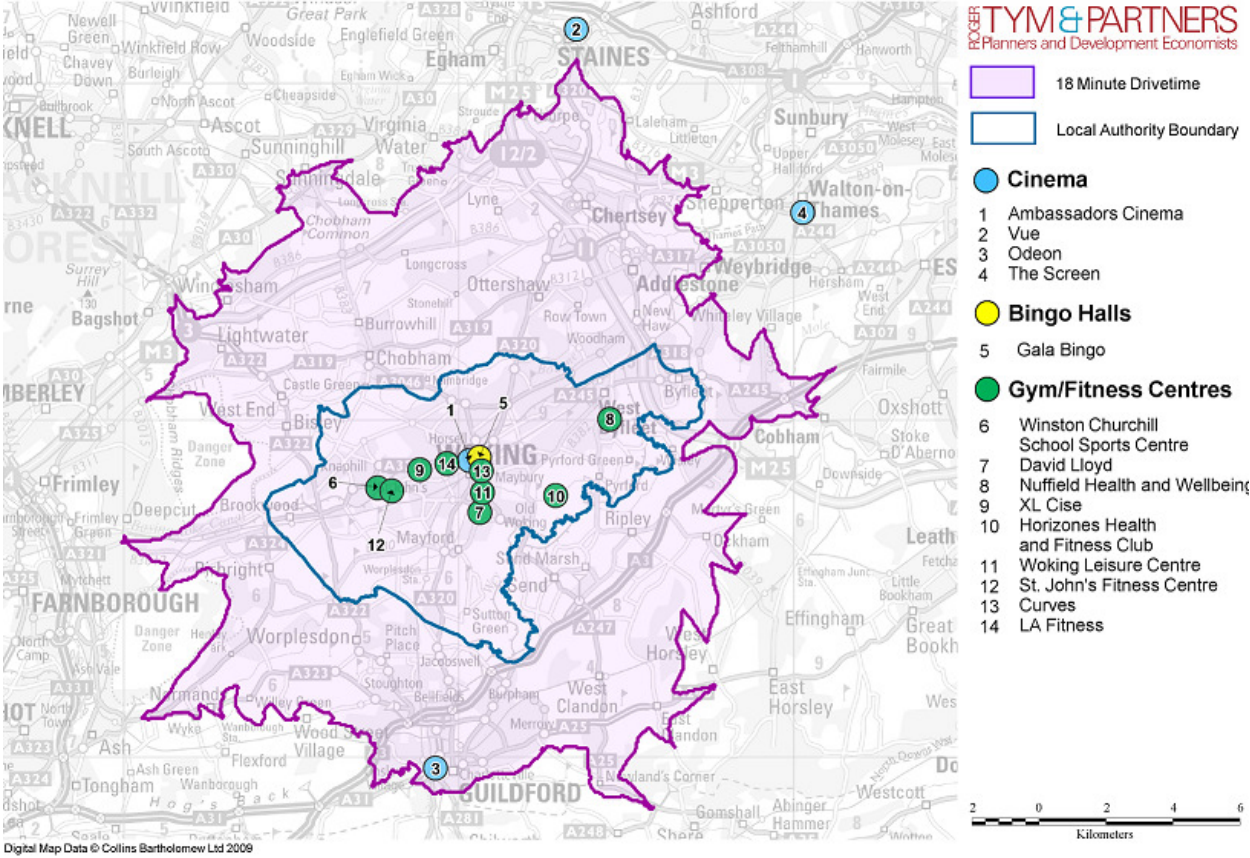
- 7.9 Findings from the household survey suggest that a majority of expenditure on food and drink, in other words, on 'restaurants, cafés, bars etc.', will be retained within the study area. In broad terms, we estimate leakage to be approximately 70% of total expenditure in this category. This figure is calculated by taking the combined leakage figures for two related categories as estimated from the household survey: restaurants/cafes & bars/clubs/ pubs.
- 7.10 In the same way that an allowance is made in the retail sector for existing operators to improve their turnover efficiency, it is reasonable to assume that some of the growth in available food & drink expenditure should be directed to existing operators (to allow them to grow their business, re-fit their premises, and so on). Unlike in the retail sector, however, there is a dearth of published advice on what proportion of expenditure growth in the food & drink sector should be ring-fenced for existing operators. In the absence of firm guidance, we have therefore allocated half of the growth in food & drink expenditure to existing restaurateurs and pub/bar operators.
- 7.11 For food and drink items we followed an approach (Tables 16 to 20, Appendix 8) similar to that used with comparison goods. Per capita expenditure was increased at the rate of 0-0.8% per annum, as forecast by Experian in Retail Planner Briefing Note 6.1. The resulting market shares were first used to derive the 2009 expenditure pattern. The resulting turnovers, when divided by the gross A3, A4, A5 floorspace in Woking provide sales densities around £6,200 per sqm. These were used as a guide to the sales density of new floorspace. All sales densities were grown at the rate of 0.4% per annum. The indicative A3, A4 and A5 gross floorspace requirements are included at Table 20 of Appendix 8 and are reflected in the town centre strategies for each of the four town centres, at Section 9.
- 7.12 In particular, we note that quality restaurants can enhance the current mix of eating and drinking places in Woking. Presently, restaurants offer a range of cuisines in the district, providing evidence on demand for variety amongst customers. Accordingly, new operators can specialize in particular cuisines and bring new taste into the current market. This will vitalize the restaurant market and keep consumer interest active. Good quality cafes, bars and pubs can also attract more customers, expanding the target market and potentially increasing expenditure in food and drink.

### *Cinemas and Theatres*

- 7.13 There is currently one cinema in Woking, the Ambassadors Cinema, which is multiplex, consists of six screens. Two theatres, run by the same operator as the cinema, the Ambassador Theatre Group are also located in Woking. This includes the well regarded New Victoria Theatre, which performs a sub-regional role. It is anticipated that approximately 2% of growth in leisure expenditure can be apportioned to cinema and theatre admissions combined, sub-categories under 'cultural services.' Although this change in spending is not significantly higher than current levels, the presence of one cinema may not be sufficient to accommodate this growth. To confirm this, we must resort to screen density and existing drive time figures.

7.14 Cinema operators make decisions of expansion or location based on ‘screen density’ - that is, the existing provision within appropriate drive-time isochrones, taking account of population levels (or the number of screens available per 100,000 people). The latest information that we have access to indicates that the average travel time to a cinema is around 18 minutes (as defined by Caviar). We have therefore analysed cinema provision within an 18-minute drive-time of Woking town centre.

**Figure 7.1 Location of cinemas, bingo halls and gyms within and immediately outside Woking**



7.15 The figure above depicts the cinemas (Only Ambassador Cinema has been plotted, as the location of the theatres is the same point 1 in map). Bingo halls and gym/fitness centres present within and around the borough as well as the 18-minute drive time from Woking town centre.

**Table 7.3 Cinema Screen Density within an 18-minute drive-time of Woking Town Centre**

Study Area	Cinemas within 18 minute drive-time	No of screens within 18 minute drive-time	Population within 18 minute drive-time	Screen Density (i.e. screens per 100,000 people)	South East Average Screen Density	UK Average Screen Density
Woking	2	15	252,114	5.9	5.9	5.8

7.16 As can be observed, current screen density in Woking is the around same as the South East and national averages. There are 5.9 screens are present per 100,000 people in the Woking ‘cinema catchment’. This indicates there is no pressing requirement for further screens.

## Games of chance

### Bingo Halls

- 7.17 One bingo halls was identified in Woking, namely Gala Bingo. From the map above, it can be seen this bingo hall is located in Woking town centre. It is the primary bingo hall within the borough and its neighbouring areas.

**Table 7.4 Growth in Bingo Hall expenditure 2009-26**

Study Area	Bingo Halls within and around area	Growth in 'games of chance' expenditure 2009-26 (£m)	Proportion of expenditure on Bingo Halls 2009-26	Growth in expenditure for Bingo Halls 2009-26 (£m)
Woking	1	16.2	7.3%	1.2

- 7.18 Applying current expenditure proportions, we found that approximately £16.2 million (7.7%) of expenditure growth can be allocated to 'games of chance'. Although there are many different sub-categories within 'games of chance', a previous RTP research shows that bingo comprises approximately 7.2% of the expenditure. From this, we estimate that additional spending over the period up to 2026 at bingo halls will be around £1.2 million. Accordingly, it seems that the existing bingo hall capacity in the Woking study area will be sufficient over the long term due to the marginal anticipated growth.

### Casinos

- 7.19 Presently, there are no casinos located within the borough. The closest casino is some 20 miles from town centre, located in Reading (Grosvenor Casino). There have been on-going efforts by the private sector to develop a casino in Guildford. However, reluctance has been showed by the council in the past due to the consultation with the Citizen's Panel conducted in 2006 to obtain their perception. The council discovered that 83% of those consulted were opposed to the idea while 92% stated that they are unlikely to use it.
- 7.20 Therefore, the possibility of an additional casino located close to Woking currently remains unknown. Further, no evidence of a casino development *within* Woking was found. However, caution is advised in considering casino development within the district based on two factors: (1) the reluctance of the public in a neighbouring district (Guildford) to accept casino development in their own locality, and (2) the existing efforts put forth by the private sector to develop in Guildford (which can serve the neighbouring districts as well).

### Bookmakers

- 7.21 In regard to bookmakers, there are a number of betting shops located in Woking. Based on gambling licences, we found that there are currently 12 outlets where the principle activity is betting. These include large bookmaker chains such as William Hill and Coral which have more than one shop within the district; e.g. Coral has five betting shops within the borough. Referring back to the anticipated growth in this sector, there may be potential for further bookmaker presence and operation in the district.

### *Health and fitness*

7.22 There are nine gyms/fitness centres identified on the map which fall within the borough boundary or just outside it. Of these, there is a variation in terms of the quality and type of activities offered by each of the fitness centres located in Woking. Facilities and services offered by each gym are provided in the table below.

**Table 7.5 Health and Fitness Facilities within Woking Borough**

<b>No.</b>	<b>Gym/Fitness Centres</b>	<b>Address</b>	<b>Type</b>	<b>Facilities/services</b>
1	Winston Churchill School Sports Centre	Hermitage Rd, St. Johns, Woking, GU21 8TL	Private	Sports Hall, AstroTurf Pitch, Tennis/Netball Courts, Aerobics
2	David Lloyd	Westfield Avenue, Old Woking, Woking, GU22 9PF	Private	Indoor Pool, Sauna and Steam Room, Gym and Personal Training, Children's Area, Crèche and Nursery, Hair and Beauty Salon, Physio, Sports Shop, Bar, Function Suite and Restaurant, Wireless Access, Sports Hall
3	Nuffield Health and Wellbeing	Pyrford Road, Woking, GU22 8UQ	Private	Fitness area, health & wellbeing assessments, personal training, physiotherapy, sauna, spa, squash courts, steam room, swimming pool, crèche
4	XL Cise	33, Westmead, Woking, GU21 3BS	Private	Music-based exercise
5	Horizons Health and Fitness Club	Old Woking Rd, Woking, GU22 8JH	Private	Gym & Personal Training
6	Woking Leisure Centre	Kingsfield Rd, Woking, GU22 9BA	Public	3 swimming pools, 6 squash courts, a multi-function main hall and ancillary halls, refurbished gym, weights room, sauna, spa and steam suite, outside pitches, indoor play frame and a multi-sensory suite providing a wealth of activities for individuals, couples, families and group
7	St. John's Fitness Centre	5-7, St. Johns Rd, Woking, GU21 7SE	Private	Gym & Personal Training
8	Curves Health and Fitness Centre	Owen House, Heathside Crescent, Woking, GU22 7AG	Private	Exercising facilities (women only)
9	LA Fitness	Arthurs Bridge Wharf, Horsell Moor, Woking, GU21 4NQ	Private	Gym & Personal Training, Pool, Sauna, Spa, Steam, Swimming Pool

7.23 Gyms/fitness centres fall within the 'recreational and sporting services' category, which is expected to grow by £12.3 million. Although this category comprises of many other activities, including sports and amusements parks, there is general trend of increased

consciousness regarding the importance of physical fitness. Therefore, there may be scope to develop more quality fitness centres in the Woking study area, offering more facilities and activities to the population of the study area.

### *Family Entertainment*

- 7.24 This is a broad category that comprises facilities including activities such as ten pin bowling. In Woking, the Big Apple which is located in the town centre stands out as an important family entertainment destination. It consists of bowling, laser quest and a play area for the kids, along with a café and bar. Some of the fitness centres listed above also cater for sporting recreational activities, such as David Lloyd and the Woking Leisure Centre. Other activities are located in Guildford, which tends to attract family entertainment demand to the area. We find no pressing requirement for further family entertainment facilities in the borough.



## 8 OTHER TOWN CENTRES USES

### Offices

#### *Existing research*

- 8.1 An Employment Needs Assessment (ENA) was undertaken by the Council in 2005 as part of the LDF evidence base. The ENA provided evidence and established baseline conditions for employment needs in terms of land supply. It states there is some 414,636 sqm (gross) of B1 floorspace, equivalent to 65% of total B-space employment in the borough. Lambert Smith Hampton, commercial property agents, have recently published 2009 economic floorspace figures. These figures show that employment in offices in 2009 comprised:

**Table 8.1 Office floorspace in Woking Borough, 2005**

	Floorspace, 2005		Additional floorspace needed between 2005-2016	
	sq m	% of all B-space	sq m	%
Office & light Industrial (B1)	414,636	65%	43,000	+18%

Source: Employment Needs Assessment, Woking Borough Council, 2005

- 8.2 Between 2003 and 2016, Experian estimates are used in the ENA to forecast an additional 7,200 B-space jobs likely to exist in the borough, of which 4,900 will occupy office floorspace. Using employment density figures (the ratio used was 16.4 sqm/worker), the report calculates additional office floorspace requirement between 2005 (the time the report was written) and 2016 to be approximately 43,000 sqm.

#### *Emerging Research*

- 8.3 The current draft study by Lambert Smith Hampton (LSH) is presented in Table 8.2 below. Care should be taken when comparing the two sets of figures, since we only quote the B1 floorspace when referring to the ENA above and the breakdown in floorspace is different.

**Table 8.2 2009 Floorspace Totals**

Location	Site Area (Ha)	Floorspace Totals (Sq M)				Vacancy (%)
		Industrial	Offices	Mixed	Total	
Woking Town Centre	76.60	0	140,863	0	140,863	22.20%
Employment Sites	116.91	228,678	36,811	91,265	356,754	18.17%
District Centres	50.74	0	17,681	10,911	28,592	21.60%
	<b>244.25</b>	<b>228,678</b>	<b>195,355</b>	<b>102,176</b>	<b>526,209</b>	<b>19.46%</b>

Source: Lambert Smith Hampton, 2009

### *Provision*

- 8.4 Most of the borough's larger office premises are located in the town centre, whilst West Byfleet represents the second most notable location for offices. Office floorspace in the town centre amounts to approximately 140,863 sqm, of which 31,385 sqm (22%) is estimated as being vacant in 2009. Using current FOCUS data, it was found that 79 units for office-space are available covering just over 40,000 sqm. It is anticipated that part of the reason for this change has been the development of employment sites for other uses, most notably residential use.
- 8.5 The ENA reports average office rents in Woking were at £22 per sqft in 2004 (SE average = £21.79 per sq ft). For current figures, FOCUS provides an average rent of £17.96 per sq ft for the 133 available office units at the Borough-wide level. Although we cannot directly compare these two figures due to varying samples and methods in calculating these rents, a broad indication on the level and direction of change can still be obtained.
- 8.6 In April 2005, there were outstanding planning permissions (including resolutions to approve) for just less than 17,000 sqm office floorspace in Woking. Half of this floorspace can be attributed to planning permission for a new County Hall site on Brewery Road.
- 8.7 The latest Annual Monitoring Report (2008) states that on April 1, 2008 outstanding planning permissions stood at an increase of 15,000 sq m of office floorspace (B1a) in Woking Borough. This figure includes a 10,300 sq m extant permission of Surrey County Council development on Brewery Road car park, which will not proceed. Therefore, net of this site, outstanding permissions in the town centre were for an increase of 3,400 sqm of office space while 1,300 sqm were for out-of-centre increase in office floorspace.
- 8.8 It is important to consider the permission granted for the redevelopment of MVA House and Select House, Victoria Way which will result in an increase of 14,900 sqm of office floorspace in Woking and will improve the overall stock in the borough. The site has been demolished but construction work is yet to commence.
- 8.9 LSH have reported that there is presently circa 10,900 sq m of new or refurbished space available in the district with a further 15,330 sqm earmarked for development. Consented offices schemes include Altura 1 (5,300 sqm) and Kings Court (3,800 sqm). However, LSH state that the size of the Altura development is somewhat out of context of the Woking office market and it will not be built without a pre-let.

### *Summary of Demand*

- 8.10 The current demand for offices in Woking is relatively weak. The FOCUS database currently reports four interested parties demanding office floorspace. The cumulative range of area demanded is between 22,500 sqft and 28,000 sqft. (2,100 sqm - 2,600 sqm). Bearing in mind current available offices space discussed above, the demand is likely to be satisfied with existing stock.

### *Future Requirements*

- 8.11 The ENA identifies nine primary and eight secondary employment localities for the overall B-space sector employment, revealing the sub-set of B-space floorspace usage in each. It concludes that it will be possible to accommodate the additional office floorspace



required by 2016 in the primary employment areas via intensification of employment use in and around the town centre (i.e. Goldsworth Road area). Moreover, the 22% vacancy rate in the town centre office premises can potentially be used to accommodate an additional 3,200 workers.

- 8.12 Bearing in mind the above research, we agree with town centre intensification recommendations as it currently exhibits potential for improvement and uplifting as well as existing capacity to accommodate projected workers (or offices). Moreover, intensifying Woking town centre's office market can further enhance economies of scale in the use of infrastructure, ensuring the most efficient use of land.
- 8.13 Within Woking Borough, LSH have identified the following employment locations;
- Forsyth Road
  - Monument Way East
  - Monument Way West
  - Goldsworth Park Trading Estate
  - Lansbury Estate
  - Old Woking
  - Poole Road/Butts Road
  - Robin Hood Works
  - Goldsworth Road Industrial Estate
  - Byfleet Industrial Estate
  - Camphill Industrial Estate
  - Green Belt Sites (10 sites)
  - District Centres
- 8.14 Additional floorspace requirements to 2016 had not yet been published by LSH at the time of the study.

### *Vacancy Rate*

- 8.15 LSH's survey of current town centre stock shows an overall 20% vacancy rate, however they suggest that this percentage is likely to increase in the medium/long term unless some of the older buildings can be replaced with more modern accommodation.

## Hotels

### *Existing Research*

- 8.16 The importance of providing hotel accommodation is acknowledged by the Council and stated in its Local Plan. The Plan claims that previous studies have been conducted on hotel demand, and there is evidence for high standard accommodation catering towards business customers. Since these studies the Holiday Inn has opened within Woking town centre.
- 8.17 Surrey County Council (SCC), undertook research into hotels in Surrey in 2004 which further re-iterated this assertion. The figures below were obtained from the Surrey Hotel Futures Report (2004), which showed that approximately 6% of Surrey's hotel room accommodation can be apportioned to Woking.

**Table 8.3 Hotel Supply, 2004**

	Hotels	Rooms	Proportion of Rooms in Surrey
Woking	8	314	5.80%
Surrey (all boroughs)	107	5429	100%

Source: Surrey Hotel Futures, 2004

- 8.18 Three smaller grade hotels in Woking, which closed their operations within 3 years prior to the publication of this report (2004), are also identified: Glen Court, Claremont and Litten Tree. However, despite these closures, a survey conducted by SCC revealed interest by developers and hotel operators in establishing hotels in Woking. This is shown in the table below which provides evidence on the potential exhibited by the hotel sector in the borough.

**Table 8.4 Developer and Hotel Operator interest in Woking**

4/5 Star	3/4 Star	Budget / Upper Tier	Boutique/ Town House / Country Club / Country House	Other
	Days	Travel Inn	-	-
	Golden Tulip	Travelodge	-	-
	Bropar Village	-	-	-

Source: Surrey Hotel Futures, 2004

### *Existing Provision*

- 8.19 Details of the eight hotels surveyed in the county's report are provided below. As can be seen, there is one 4-star and two budget hotels. The remainder are of a lower grade.
- 8.20 Hotels listed on the Council's website, as well as results from an additional RTP search are also included; the new findings are presented at the bottom of the table. It was difficult to obtain details of room numbers and ratings on all of these hotels, but in all cases (except two), their size was small and they can be described as bed and breakfast type accommodation.

**Table 8.5 Existing Hotels in Woking Borough**

Hotel	Address	Rooms	Rating
Holiday Inn	Globe House, Victoria Way, Woking, GU21	161	4 Star
Innkeepers Lodge (Wheatsheaf)	Chobham Rd, Woking, Surrey, GU21 4AL	34	Budget
Travel Inn (now Premier Inn)	Bridge Barn Lane, Woking, GU21	34	Budget
Metro	Town Centre, 36 Chertsey Road, Woking, GU21 6HR	26	2/3 Star equivalent
Maybury Lodge	83-84 Maybury Rd, Woking, GU21 5JH	21	Lower grade

	155 High Road, Byfleet, Surrey KT14		
Blue Anchor	7RL	14	Lower grade

### ***Additional Hotels***

Arden	Onslow Crescent, Woking, GU22 7AU	4	B&B
The Beeches	49a Park Road, Woking, GU22 7BZ	3	B&B
Cleavelands	78 Woodham Road, Woking GU21 4EH	6	B&B
The Cricketers Inn	Westfield Road, Woking, GU22 9NQ	4	B&B
Dew Ponds	10 Maxwell Drive, West Byfleet, KT14 6PZ	1	B&B
Fairview Lodge	12, Fairview Avenue, Woking, GU22 7NU	-	B&B
Fenton House	19 Kingsway, Woking, GU21 1NU	6	B&B
Gorse Hill	Gorse Hill, Hook Heath Road, Woking, GU22 0QH	50	-
Inn at the Broadway	14-15 The Broadway, Woking GU21 5AP	14	B&B
Old Malt House	Bagshot Road, Worplesden GU3 3PT	3	-
The Rowbarge	39 St Johns Rd, St Johns, Woking, GU21 7SA	10	-
St. Columba's House	Maybury Hill, Woking, GU22 8AB	27	-
Star Inn	Wych Hill, Woking, Woking, GU22 0EU	4	B&B
Swallow Barn	Milford Green, Chobham, GU24 8AU	3	-
Woodlands	Ivy Lane, Woking GU22 7BY	1	-

- 8.21 It is worth noting that the Premier Inn has now expanded its capacity to 56 rooms. Taking this into consideration, together with the additional hotels sourced, the overall hotel accommodation amounts to approximately 472 rooms in the borough.

### ***Summary of Demand***

- 8.22 The FOCUS database currently does not report any demand for hotel floorspace in Woking Borough. Nevertheless, it is important to note that permission was granted for the expansion of 60 rooms to the Holiday Inn in 2008. However, recently the Holiday Inn has re-applied for an alternative permission for 30 rooms which is currently awaiting a decision. This change to the number of room proposed is due to the recent economic downturn which has affected such businesses throughout the country.
- 8.23 The Woking Gateway site is likely to include hotel accommodation as part of the mixed-use development. Planning permission has been granted for hotel accommodation the High Street of the town centre however, this site is part of the gateway site and therefore the development is now unlikely to go ahead.
- 8.24 Consumer demand can be captured in terms of occupancy rates. These rates at 3-4 star and budget hotels are relatively high in Woking, representing strong demand for hotel accommodation in the area (as sourced from the Surrey Hotel futures Report).

- 8.25 The Holiday Inn was estimated to have occupancy rates of approximately 70-75% while budget hotels projected rates of 83-95% (rising to 95-100% on weekends) in 2004. This demand was predominantly driven by business customers. In terms of room rates, the Holiday Inn achieved average rates of £85-90 and budget hotels achieved average rates of £47-60 in 2004.

### *Future Requirements*

- 8.26 The Surrey Hotel Futures report concludes that there is potential for a new 3 or 4 star hotel in Woking, based on the anticipated economic growth of the locality. However, such an accommodation may not obtain high occupancy rates over the weekend. In such circumstances, the report suggests that a golf hotel or a country club resort may be a better opportunity to attract weekend trade as well.
- 8.27 From our research, we have found that there is a sufficient supply of lower grade and B&B type of accommodation in Woking. However, there remains potential for another quality budget hotel to be developed in the area. A high quality budget hotel also has the potential to attract weekend trade. This is based on current high occupancy rates exhibited by budget hotels in Woking during the week and weekends.

## 9 STRATEGIC DIRECTION AND RECOMMENDATIONS

### Introduction

- 9.1 In Section 2 of our report, we set out the requirements that PPS6 imposes on regional planning bodies and local planning authorities in preparing development plans. These include the need to consider:
- whether there is a need to avoid an over-concentration of growth in the higher level centres;
  - the need for investment in those centres requiring to be regenerated; and
  - the need to address deficiencies in the network.
- 9.2 Thus, in preparing their Development Plan Documents (DPDs) within the context set by the RSS, LPAs must:
- select appropriate existing centres to accommodate growth, making the best use of existing land and buildings, but extending the centres where appropriate using tools such as the Action Plans, CPOs and strategies to improve transport, land assembly, crime prevention and design;
  - manage the role of existing centres through the promotion of specialist activities, or specific types of uses; and
  - plan for new centres of an appropriate scale in areas of growth, or where there are deficiencies in the existing network
- 9.3 In Section 3, we refer to the new test of soundness introduced by PPS12 in June 2008. This test requires the Council to demonstrate that its chosen strategy is the most appropriate, when considered against reasonable alternatives and, secondly, that the chosen strategy is effective and deliverable.
- 9.4 Thus in assessing strategies for meeting retail and leisure needs, we have dismissed those which would clearly not accord with national and regional policy. Such inappropriate strategies include trying to meet most of the need in existing out-of-centre retail parks or recommending no action for Woking town centre. In addition, we consider that all reasonable strategies should acknowledge our suggested revision of the hierarchy of centres and the availability of opportunity sites within or on the edge of smaller centres such as Knaphill.
- 9.5 Our recommendations for Woking, West Byfleet and Knaphill set out retail and leisure floorspace requirements for each town centre. These are rounded to the nearest 100 sqm for ease of presentation. We also make recommendations as to how these requirements could be achieved. Due to our reservations as to the accuracy of forecasts post 2016, we emphasise that more reliability and weight be given to the estimated 2009-2021 requirements. The requirements to 2026 are less reliable and should be reviewed within five years of this study and with regular monitoring thereafter.
- 9.6 The recommendations below are intended to inform future development plan documents (DPDs) or any other local development documents (LDDs).

## Recommendations for Hierarchy of Centres in Woking Borough

- 9.7 In Section 3, there is a detailed assessment of the vitality and viability of Woking, West Byfleet and Knaphill. In addition, we have assessed the performance of Sheerwater, St Johns, Byfleet, Horsell, Goldsworth Park and Kingfield. The remainder of the centres in the borough as currently designated in the Local Plan are much smaller. We did not undertake detailed assessments of the vitality and viability of these centres, since they comprise localised shopping parades, neighbourhood centres or small villages. However, to understand their contribution and role in the hierarchy of centre, an audit of the service provision for each centre was undertaken. The assessments in Section 3 culminate in a suggested revision to the hierarchy in the borough, as set out in Table 9.1.

**Table 9.1 Suggested Revision to the Council's Hierarchy of Centres**

Position in Hierarchy	Centres
Town Centre	Woking
District Centre	West Byfleet,
Local Centre	Byfleet, Goldsworth Park, Horsell, Kingfield, Knaphill, Sheerwater, St Johns.
Neighbourhood Centres/Shopping Parades	Brookwood, Pyrford, Westfield, Mayford, Old Woking, Walton Road, Anchor Hill, Barnsbury, Gorsewood Road, Guildford Road, Hermitage Road, Maybury, Oriental Road, Rydens Way, Wych Hill

Note: the fourth level of the hierarchy are not considered to be 'centres', in accordance with the guidance in the footnote to Table 1, Annex A of PPS6.

## Summary of Need for Town Centre Floorspace in the Borough

- 9.8 Sections 6, 7 and 8 explain our analysis of need for retail, leisure and a summary of the approach to other uses such as hotels and offices. Turning first to quantitative need, we have summarised the borough-wide position in Table 9.2. This draws together the comparison and convenience retail capacity, as well as the leisure orientated food and drink capacity. This assessment is based on constant market shares, with the convenience assessment including expenditure which currently funds the overtrading of existing foodstores.

**Table 9.2 Summary of Potential Additional Floorspace within Woking Borough**

	2009- 2016	2009- 2021	2009- 2026
A1 comparison sqm gross	12,700	42,600	69,800
A1 convenience sqm gross (superstores/supermarkets)	5,600	6,300	6,900
A1 convenience sqm gross (small foodstores/deep discounters)	5,500	6,200	6,800
A1 service/A2 sqm gross	1,300	4,300	7,000
A3, A4 and A5 sqm gross	900	2,100	3,400
Total sqm gross for A1-A5 uses	26,000	61,500	93,900

- 9.9 In terms of qualitative need, there were the following clear messages:
- Improve retail provision, specifically attracting 'higher quality' retailers, to compete with Kingston and Guildford.
  - Improve the physical environment.
  - Relieve the overtrading of foodstores to increase competition and choice.
- 9.10 In addition, in respect of other town centre uses, we have identified:
- Improve the quality of bars and restaurants, specifically in the east of the centre.
  - Include some provision for new office space.
  - Opportunity for a hotel to meet current demand.
- 9.11 In formulating our strategies, we have taken into account the availability of sites, the accessibility and function of the centres, their existing market share and the position of the centres in our recommended revision to the town centre hierarchy. As explained earlier, we have considered reasonable alternatives strategies in accordance with PPS12, before suggested potential long term outcomes for Woking, West Byfleet, Knaphill and, in combination, all other designated local centres within the borough. These outcomes are suggested floorspace targets necessary to maintain the market share of all of the borough's centres vis-à-vis competition from other centres elsewhere in the sub-region and from out of centre developments.

## Strategy for Woking

### *Context and Reasonable Options for Woking Town Centre*

- 9.12 Woking town centre is the largest town in the borough and it dominates shopping patterns. Although the town centre does not offer the historic charm and retail offer of nearby Guildford, it is a successful centre and increased its retail ranking from 115 and 94 between 1998 and 2008. In addition, as explained in Section 5 for zones 1-6 we have compared telephone survey data from 2004 (which underpinned the 2004 DTZ study) with the position in 2009. This indicates that Woking's market share of the core zones 1-6 has increased from 17.9% to 25.4% since 2004.
- 9.13 Some elements of Woking town centre appear dated, but it has a strong offer through the Peacocks and Wolsey Place shopping centres as well as a strong leisure offer with the Ambassadors cinema and the New Victoria theatre. Despite its apparent strong performance, Woking has significant potential for growth and redevelopment for four key reasons.
- 9.14 First, Policy TC2 of the recently approved SEP explains that *'Centres for Significant Change'* (such as Woking) are *'expected to undergo the most significant change across the range of town centre uses during the plan period and proactive, integrated strategies for their development will be particularly important'*. This is an important policy direction and is one which has been embraced by the Council.
- 9.15 Secondly, Woking is also identified as a Regional Hub in the SEP. Policy SP2 in the SEP encourages higher density land uses and/or mixed land uses that require a high level of accessibility so as to create *"living centres"*. Woking town centre benefits from excellent accessibility, with a very frequent train service to London, good access to the M25 and the

national motorway network, and a rail-air coach service. In addition, there are plans to link Woking directly to London Heathrow by rail and Woking has embraced sustainability through its cycling town status. On all levels, Woking benefits from excellent accessibility; this gives strong support to the notion of future growth.

- 9.16 Thirdly, the strategic housing proposals for Woking are likely to result in a rapidly expanding population during the plan period. The SEP requires the borough to accommodate 5,840 new dwellings between 2006 and 2026 (or 292 per annum). Our assessment shows that in the core zones of 1a, 1b, 1c and 2 (which broadly accord to the borough boundary) population will increase by 3,229 between 2009 and 2026. Importantly, these are conservative projections since we understand the Surrey projections for these zones do not fully reflect the SEP projections. As the main town centre in the borough, Woking must be fit for purpose to accommodate this growth.
- 9.17 Fourthly, there is clear evidence of competition from other town centres which over time has the potential to erode the market share of Woking town centre. Specifically, we are aware of an extant permission in Guildford for some 25,000 sqm (gross) of additional retail floorspace, whilst in Kingston upon Thames there is policy commitment to a major new retail development in the town of up to 70,000 sqm (gross). Furthermore, Bracknell will undergo a major remodelling scheme which will improve its retail offer during the plan period and create an additional 56,000 sqm (gross) of retail floorspace. Although we appreciate the future of some of these schemes is not certain due to the current economic circumstances, there are plans in place and they represent a real risk to the future performance of Woking town centre.
- 9.18 In summary, there is a shared ambition at regional and local level to change the nature and function of Woking town centre. In our view a **'no action' option is not a realistic alternative**. However, there are reasonable alternatives as to how this ambition can be met and these can be divided into two 'options', although we appreciate that there are various permutations to both options. A summary of the two main options is set out in Table 9.3 below.

**Table 9.3 Options for the Redevelopment of Woking**

Options	Key Characteristics
Option 1: Modest Expansion	<ul style="list-style-type: none"> <li>▪ The layout of the town centre largely remains the same</li> <li>▪ Extensions to existing facilities are encouraged</li> <li>▪ High density development of key opportunity sites for a mix of uses</li> <li>▪ Improvements to the physical environment of the town centre</li> </ul>
Option 2: Major Remodelling	<ul style="list-style-type: none"> <li>▪ Major remodelling of the town centre is undertaken</li> <li>▪ Significant redevelopments are encouraged with a mix of uses, including a critical mass of retail floorspace</li> <li>▪ There is improved integration between the different uses within the town centre.</li> </ul>

- 9.19 It is ultimately for the Council to decide the most appropriate approach through the LDF process. However, it is our view that Option 1 will not achieve the improvement in the



town centre necessary for Woking to respond to competition and to fully achieve the aspirations set out in regional policy for Regional Hubs and Centres of Significant Change. Option 2 will require a major input from the Council from both policy intervention and potentially through its use of its compulsory purchase powers. However, through discussions with officers and stakeholders, it appears that Option 2 and the associated benefits that sit alongside such wholesale change would be encouraged, in principle, by most stakeholders within the town.

### *Development Potential*

- 9.20 Our borough-wide floorspace capacity projections are set out in Table 9.2 above. As the only 'town centre' in the borough and identified as a centre for significant change in the SEP, Woking is the natural and logical destination for the majority of this growth. Taking this into account, we have developed suggested a potential long term outcome for this floorspace as set out in Table 9.4 below. These figures should not be considered as prescriptive; rather they should be considered as target of what could be achieved in Woking.

**Table 9.4 Summary of Potential Additional Floorspace within Woking**

	Current floorspace	2009 - 2016	% Growth 2009-2016	2009 - 2021	% Growth 2009 - 2021	2009 - 2026	% Growth 2009 - 2026
A1 comparison sqm gross	66,950	10,800	16%	36,200	54%	59,300	89%
A1 convenience sqm gross (superstores/supermarkets)*	7,150	5,600	78%	6,300	88%	6,900	97%
A1 convenience sqm gross (small food stores / deep discounters)	3,240	1,100	34%	1,200	37%	1,400	43%
A1 service/A2 sqm gross	16,080	1,000	6%	3,200	20%	5,300	33%
A3, A4 and A5 sqm gross	16,120	600	4%	1,500	9%	2,400	15%
Total sqm gross for A1-A5 uses	109,540	19,100	17%	48,400	44%	75,300	69%

\*Includes Sainsbury's and Morrisons(GOAD 2008 data)

Source: Appendix 8 (it is assumed that the A1 service/A2 requirements are 10% of the gross comparison requirements). Requirements are rounded to the nearest 100 sqm gross.

- 9.21 Focusing on the requirement to 2021, we have estimated that a total floorspace of 48,400 sqm (gross) of A1-A5 uses, including some 36,200 sqm (gross) of comparison floorspace. Looking to 2026, the total requirement increases to 75,300 sqm (gross) of which 59,300 sqm (gross) would be devoted to retail uses. As a way of comparison, Woking currently has 109,940 sqm (gross) of A1-A5 uses, and 66,950 sqm (gross) of A1 comparison floorspace. We anticipate the figures to 2021 to be more robust and we consider it essential that the borough's plans meet these needs for the four important factors explained in paragraphs 9.14 to 9.17.

- 9.22 Table 9.4 shows that approximately 85% of the borough-wide comparison floorspace growth should be accommodated in Woking town centre. i.e. 100% of the A1 convenience (superstores/supermarkets), 25% of the A1 convenience (small foodstores/deep discounters), 75% of A1 service/A2 uses and 70% of A3, A4 and A5 uses to Woking town centre. These percentages are not intended to be prescriptive; rather they take into consideration the PPS6 guidance that uses which attract a large number of people should be located within centres that reflect the scale and catchment proposed.
- 9.23 It should be pointed out that part of our assessment includes the inclusion of one major superstore in the town centre (of approximately 6,300 sqm gross floorspace) by 2021. Our assessment revealed significant overtrading of the two largest foodstores in the borough, namely Sainsbury's at Brookwood and Morrisons on Goldsworth Road. With the closure of the M&S unit in the Peacocks, the foodstore offer in the town centre is now limited to the Sainsbury's Central in Wolsey Place and a small M&S food at the railway station. There is an opportunity for a further large superstore to be accommodated within the town centre in order to relieve the overtrading of existing foodstores, to improve competition within the borough and to encourage linked trips between this new suggested store and the remainder of other businesses in the town centre.
- 9.24 As well as A class uses, we have identified a requirement for a budget hotel, a gym and some office space.

### *Spatial Proposals*

- 9.25 A plan of Woking town centre is attached at Appendix 11. This includes a series of 'development opportunity sites' which we have identified. These are suitable sites to bring forward new town centre floorspace. They have been chosen sequentially, focusing on town centre and edge of centre opportunities, and are summarised at Table 9.5.

**Table 9.5 Opportunity Sites within or on the edge of Woking**

<b>Site</b>	<b>Area (ha)</b>	<b>Description</b>
Woking Gateway	1.65	Includes large proportion of existing town centre in close proximity to Woking Railway Station.
Fire station/Post Office	0.78	Includes the vacant Post Office building and the outdoor market area. In close proximity to the Peacocks Centre and Wolsey Place.
BHS Store	0.39	BHS store and ancillary buildings.
Chertsey Road	0.17	Number of vacant units and takeaways. Site is in need of regeneration. Currently provides unattractive gateway into the centre.
Offices, Victoria Way	0.25	Existing offices adjacent to recent hotel and residential developments at a main entrance point to the centre.
Goldsworth Road	0.16	Vacant edge-of-centre site suitable for a stand alone.
Commercial Way	0.36	Existing units (majority retail) within town centre.
The Big Apple	0.66	Leisure complex
Industrial Units, Poole Road	1.73	Edge of centre site in between Morrisons and Goldsworth Road
Junction of Goldsworth Road & Victoria Way	0.17	Site adjacent to approved Altura development. Existing offices and retail.

- 9.26 We have not undertaken a detailed development appraisal of these sites. However, one of the most important sites is the 'Woking Gateway' site and the Council have entered into a development agreement with Carisbrooke. In addition, we consider the fire station/Post Office site is also important and, in combination, this site plus the Gateway site provide a significant opportunity to remodel the town centre (as envisaged under option 2 above).
- 9.27 The Woking Gateway site incorporates a large (1.65 ha) proportion of the town centre, incorporating Albion House and all of the properties to the south of Commercial Way and to the north of the High Street. The future of this site is at very early stages, although we understand that aspirations for the site include high quality retail space, residential accommodation, 10,000 sqm of office space, a central hotel, improved public spaces and public transport facilities. We understand that consultation is due to take place in the remainder of 2009, with a planning application being prepared in 2010 and submitted to the Council in 2011.
- 9.28 The other key site in the town centre is the fire station site, which includes the vacant Post Office building and the outdoor market area and extends to some 0.78 ha. This site is allocated in the 1999 Local Plan for retail uses and has yet to come forward for development. We note the site is adjacent to west of the Woking Gateway site, albeit is separated from the Gateway site and the remainder of the town centre through Cawsey Way and Church Street West, which is a bus and taxi route into the town centre from the west. Fire stations are not identified as a town centre use in PPS6 and thus this site

provides, in principle, an ideal development opportunity. Subject to ensuring the relocation of the fire station and overcoming any highways concerns, this site offers an opportunity to extend either the Peacocks Centre or Wolsey Place.

- 9.29 The other sites we have identified vary in size and we have identified them as having potential for intensification of use. In particular we note that BHS site, although accommodating a successful store, is separated from the main retail core of the town centre and potentially could incorporate a range of different uses on upper floors if redeveloped.
- 9.30 In addition, it has been suggested by some stakeholders that there could be comprehensive redevelopment of Wolsey Place. Since this is a successful shopping centre and is well let, we have not identified this as an opportunity site. However, it is now over 30 years old and we anticipate that during the plan period it may suffer from competition from more modern developments. Therefore, its redevelopment or modernisation is appropriate and could potentially incorporate the fire station site if further land is required to help fund such a major scheme.
- 9.31 We advise that any major remodelling of the town centre be facilitated through an Area Action Plan (AAP). This ensures full consultation and the inclusion of redevelopment schemes within a statutory plan, thus ensuring that planning applications comply with T&CP Act Section 38(6). It also enables the proposed mix of new uses in the town centre to be integrated into a cohesive manner and for the provision of infrastructure to support new development.
- 9.32 We are, however, aware that opportunities can arise when some adopted planning documents are under review and such opportunities should not be lost. The current lack of an AAP should not preclude any non-statutory masterplans being prepared in the interim or planning applications being determined, provided that wider, town centre issues are fully considered and that a Woking town centre AAP is set in motion.
- 9.33 If Option 2 is preferred as a basis for LDDs, we suggest the following inputs when considering development potential of sites in Woking town centre:
- There is physical capacity for a series of major developments in the town centre to provide a full range of retail uses providing at least 48,400 sqm (gross) of retail floorspace and passive leisure (A3, A4 and A5) uses by 2021.
  - This should include a large foodstore within the town centre in order to relieve overtrading at existing stores, improve competition and encourage linked trips.
  - Every opportunity should be taken to provide for both larger unit sizes, including a proposed new department store and new foodstore, as well as some smaller units for independent operators.
  - New development should be well integrated with the remainder of the town centre. The linkages between the railway station and the remainder of the town centre should be reinforced and a clear 'retail circuit' should be established.
- 9.34 The floorspace projected requirement for Woking of 48,400 sqm (gross) A1-A5 floorspace is for the period to 2021. This includes some 36,200 sqm (gross) of comparison floorspace. However, this should not preclude developments being promoted now and

opening prior to 2021, subject to it being demonstrated that the proposals relate to the role and function of Woking and that the impact on existing centres is acceptable. Due to the long planning and implementation programme for most major town centre developments of the scale we have recommended, combined with the current economic circumstances, means we do not expect that a major retail led development would open until after 2016.

- 9.35 The recommended floorspace requirements for Woking town centre are proposed to be delivered by an expansion of the town centre. Any significant out-of-centre retail development that would threaten the delivery of a town centre scheme should be strongly resisted.

### *Summary of Recommended Strategy*

- 9.36 Drawing together the above paragraphs, we recommend that LDDs incorporate strong aspirations for growth within Woking town centre, specifically to meet the suggested capacity of some 48,400 sqm (gross) of A1-A5 uses by 2021. LDDs should ensure that high density developments and a mix of uses are achieved in order to establish a cohesive town centre and a clear retail circuit. The key challenge is to achieve Woking's emerging potential so that it can take advantage of the improving market conditions.

## Strategy for West Byfleet

### *Context and Reasonable Options for West Byfleet Centre*

- 9.37 West Byfleet is the second largest centre in the borough. It benefits from a strong food and drink leisure offer, a point that was expressed strongly at our stakeholder events. It also has good accessibility, benefiting from a mainline railway station. However, its retail ranking has declined from 1,268 in 1998 to 1,716 in 2008 and it is suffering a relatively high vacancy level, especially since the Woolworths store closed. It also suffers from competition from the out of centre Tesco Extra and M&S store at Brooklands, whilst its physical environment has been criticised in the press.
- 9.38 As opposed to Woking, the options for West Byfleet do include a 'no change' option. We received mixed feedback from our stakeholder feedback, with some suggestions that a large scale redevelopment would not be welcomed due to the disruption that would occur and the associated loss of trade. However, we are aware that the Norwich Union building (Sheer House) is not popular in the local community and would benefit from redevelopment. We consider both options are reasonable alternatives and we summarise the approach in the following Table.

**Table 9.6 Options for the future of West Byfleet**

Options	Key Characteristics
Option 1: No Significant Change	<ul style="list-style-type: none"> <li>▪ There is a likelihood of continued decline in retail rankings, with potential short term increases in the vacancy rate</li> <li>▪ There will be a dilution on the retail offer, with A2-A5 uses becoming more prominent over time</li> <li>▪ The function of the centre will shift towards a 'small' district centre, with a leisure and service offer rather than any retail offer.</li> </ul>
Option 2: Redevelopment	<ul style="list-style-type: none"> <li>▪ Provision of further retail and leisure floorspace can encourage linked trips between the new uses and existing businesses</li> <li>▪ New development can be used to fund improvements in local infrastructure and environmental improvements.</li> <li>▪ New development can be used to reverse the decline in retail rankings and reinforce the centre's retail function as a district centre, whilst building on its food and drink leisure strength.</li> </ul>

9.39 Although it is a reasonable alternative to downgrade the function of West Byfleet under Option 2 and focus on its leisure offer, we do consider that an opportunity will be missed and there is no guarantee that the aspiration of a leisure orientated centre can be achieved without investment. Furthermore, West Byfleet benefits from a mainline railway station which is a relatively unusual feature for smaller centres. There was no clear message from stakeholders as to whether this approach is appropriate although we consider Option 2 should be considered seriously by the Council when preparing its LDDs.

### *Development Potential*

9.40 As a district centre, West Byfleet does not have the physical capacity or catchment to achieve a large quantum of additional retail and leisure space. However, under Option 2 above, we consider there is an opportunity to achieve additional floorspace within the town centre thus we have suggested a potential long term strategy for West Byfleet, as set out in Table 9.7.

**Table 9.7 Projected Future Floorspace requirements for West Byfleet**

	Current floorspace	2009 - 2016	% Growth 2009- 2016	2009 - 2021	% Growth 2009 - 2021	2009 - 2026	% Growth 2009 - 2026
A1 comparison sqm gross	2,330	1,900	85%	6,400	286%	10,500	469%
A1 convenience sqm gross (superstores/supermarkets)	1,700	0	0%	0	0%	0	0%
A1 convenience sqm gross (small food stores / deep discounters)	968	1,700	191%	1,900	213%	2,000	224%
A1 service/A2 sqm gross	3,060	200	10%	600	30%	1,100	55%
A3, A4 and A5 sqm gross	2,830	200	16%	400	31%	700	55%
Total sqm gross for A1-A5 uses	10,750	38,000	591%	8,400	131%	12,900	201%

9.41 Focusing on the requirement to 2021, we have estimated that a total floorspace of 8,400 sqm (gross) of A1-A5 uses, including some 6,400 sqm (gross) of comparison floorspace. Looking to 2026, the total requirement increases to 14,300 sqm (gross) of which 10,500 sqm (gross) would be devoted to comparison retail uses. As a way of comparison, West Byfleet currently has 6,398 sqm (gross) of A1-A5 uses, and 2,047 sqm (gross) of A1 comparison floorspace. Therefore, this floorspace requirement would represent a major uplift from its current floorspace,

9.42 Importantly, we have included an allowance for a small foodstore/deep discounter of up to 1,900 sq m (gross) to 2021. Since there is already a Waitrose store (1,562 sqm net) in West Byfleet and a nearby large Tesco Extra store at Brooklands, we do not consider there is scope for any major new superstore or supermarket growth within the centre. However, we are aware of a demand for a Lidl store within the borough and we consider that such a deep discounter within or on the edge of the centre could claw back some of the trade lost at Tesco at Brooklands, encourage linked trips and improve choice within the centre.

### *Spatial Proposals*

9.43 A plan of West Byfleet is attached at Appendix 11. As with Woking, this includes a series of 'development opportunity sites', which we consider are suitable sites to bring forward new town centre floorspace. They have been chosen sequentially, focusing on in centre and edge of centre opportunities, and are summarised at Table 9.8

**Table 9.8 Opportunity Sites within or on the edge of West Byfleet**

<b>Site</b>	<b>Area (ha)</b>	<b>Description</b>
Norwich Union Building/ Sheer House	1.06	Mixed use retail and office building
40-41 Station Approach	0.19	Existing vacant units
Beacon House and Centennium House, Pyrford Road	0.12	Mixed backland development
Former Telephone Exchange	0.38	Vacant telephone exchange

- 9.44 The most apparent site for redevelopment within West Byfleet is the Norwich Union building and the surrounding area, which extends to some 1.24 ha. The existing ground units themselves extend to some 2,200 sqm (gross) and there is office space above, there is a short stay car park surrounding the units. Feedback from stakeholders revealed that there was some support for the redevelopment of this site and the wider improvement to the physical environment that would accompany such a development.
- 9.45 If Option 2 is preferred as a basis for LDDs, we suggest the following inputs when considering development potential of sites in West Byfleet:
- There is potential for the redevelopment of the Norwich Union site for a mix of uses to include at least 9,300 sqm (gross) of retail uses.
  - Every opportunity should be taken to provide for both larger unit sizes in any development, whilst an allowance for food and drink leisure uses should be made to build upon the successful offer in the town centre already.
  - A new deep discounter foodstore could be accommodated within the centre.
  - The physical environment should be improved, potentially with a remodelling of the highways arrangement in order to improvement pedestrian movement throughout the centre
  - Any new development should be well integrated with the remainder of the town centre, whilst the linkage between the railway station and the town could be improved.

### *Summary of Recommended Strategy*

- 9.46 Our study has not sought to pre-determine the option that will be adopted for West Byfleet. However, it is our recommendation that Option 2 will deliver benefits and that there is no guarantee and alternative strategy to downgrade the retail role of West Byfleet would succeed. Therefore, there is a danger that the vitality and viability of the centre would suffer and West Byfleet would not have any clear role within the hierarchy.

## **Strategy for Knaphill**

### *Context and Reasonable Options for Knaphill*

- 9.47 Knaphill is a pleasant centre, with a good range of services, including three banks, some successful independent stores and a successful small foodstore in the form of the Co-op.



Its retail ranking is broadly consistent, between 1,194 and 1,018 and the vacancy rate is low. There is free parking and the centre performs well as a smaller district centre within the borough. However, it suffers slightly from the out of centre Sainsbury's at Brookwood and we understand that Budgens closed in 2003. In addition, there are few development sites in the centre and the site is closely surrounded by residential properties, reducing the scope for expanding the centre in any direction.

- 9.48 We have recommended that Knaphill be reclassified in the hierarchy of centres to a local centre, due to the limited service provision compared to West Byfleet. Therefore, we consider that a 'no change' option is a reasonable alternative for Knaphill. We also consider is also a 'modest development' option is reasonable, which could meet some local needs in order to maintain the vitality and viability of Knaphill. The characteristics of both options are set out in Table 9.9.

**Table 9.9 Options for the future of Knaphill**

<b>Options</b>	<b>Key Characteristics</b>
Option 1: No Significant Change	<ul style="list-style-type: none"> <li>▪ Knaphill continues its role as a local centre within the borough</li> <li>▪ Its retail and local service function would be protected, although on occasions there will be vacancies.</li> <li>▪ Opportunities should be taken to improve the environment and modernise shopping facilities where possible.</li> </ul>
Option 2: Modest Development	<ul style="list-style-type: none"> <li>▪ If sites are available, there is scope for a modest new development.</li> <li>▪ Knaphill's local retail function should be maintained, but there is scope to improve the choice and competition within the centre through a new small foodstore.</li> <li>▪ New development should be geared towards lengthening dwell time and encouraging trips.</li> </ul>

- 9.49 Unlike West Byfleet, a 'no change' option for Knaphill has few disadvantages. There was no clear message from stakeholders on the future of Knaphill and thus we consider that the LDF should thoroughly test these options.

### *Development Potential*

- 9.50 Knaphill does not have the physical capacity or catchment to achieve a large quantum of additional retail and leisure space. However, under Option 2 above, we consider there is an opportunity to achieve a modest quantum of additional floorspace within the centre. Thus we have suggested a potential long term strategy for Knaphill, as set out in Table 9.10

**Table 9.10 Projected Future Floorspace requirements for Knaphill**

	Current floorspace	2009 - 2016	% Growth 2009- 2016	2009 - 2021	% Growth 2009 - 2021	2009 - 2026	% Growth 2009 - 2026
A1 comparison sq m gross	2,237	100	4%	400	18%	700	31%
A1 convenience sq m gross (superstores/supermarkets)*	0	0	0%	0	0%	0	0%
A1 convenience sq m gross (small food stores / deep discounters)	892	1,400	157%	1,600	179%	1,700	191%
A1 service/A2 sq m gross	2,015	100	5%	200	10%	400	20%
A3, A4 and A5 sq m gross	1,284	0	0%	100	8%	200	16%
Total sq m gross for A1-A5 uses	6,428	1,600	25%	2,300	36%	3,000	47%

\*Sainsbury's, Knaphill not included in town centre figures

- 9.51 Focusing on the requirement to 2021, we have estimated that a total floorspace of 2,400 sq m (gross) of A1-A5 uses, including only 500 sq m (gross) of comparison floorspace to accommodate local needs and a higher requirement of 1,600 sq m (gross) for a small foodstore or a deep discounter. Looking to 2026, the total requirement increases slightly to 3,200 sq m (gross) of which only 900 sq m (gross) would be devoted to comparison retail uses and 1,700 sq m (gross) for a small foodstore or deep discounter. As a way of comparison, Knaphill currently has 11,230 sq m (gross) of A1-A5 uses, and 2,770 sq m (gross) of A1 comparison floorspace.
- 9.52 As with West Byfleet, we have included an allowance for a small foodstore/deep discounter of up to 1,600 sq m (gross) to 2021. Since there is already a Co-op store in Knaphill and a nearby large Sainsbury's store at Brookwood, we do not consider there is scope for any major new superstore or supermarket growth within the centre. However, we are aware of a demand for a Lidl store within the borough and we consider that such a deep discounter or another small foodstore could provide competition with the Co-op, claw back trade from Sainsbury's and encourage linked trips.

### *Spatial Proposals*

- 9.53 Although there were few apparent development opportunity sites in Knaphill, the sites we have identified are included on a plan of Knaphill attached at Appendix 11 and are summarised at Table 9.11.

**Table 9.11 Opportunity Sites within or on the edge of Knaphill**

<b>Site</b>	<b>Area (ha)</b>	<b>Description</b>
High Street	0.04	Vacant unit on High Street
Club, Highclere Road	0.09	Existing club
Former Binkot, Enelfield Road	0.24	Vacant Building in town centre

9.54 These sites are modest in size and are in-fill sites that provide an opportunity for a mix of uses, including retail and leisure uses on the ground floor. Whilst we consider the no development option is plausible, we consider that LDDs for Knaphill should include the following inputs:

- There is potential for the redevelopment of the Norwich Union site for a mix of uses to include at least 2,400 sqm (gross) of A1-A5 uses.
- Opportunities should be sought to encourage a second foodstore operator within the town in order to provide competition to Co-op and encourage linked trips.
- Where possible, the physical environment should be improved and the shopping facilities modernised.

### *Summary of Recommended Strategy*

9.55 Knaphill is smaller than West Byfleet and has less physical capacity for growth identified, thus it is designated as a local centre within our suggested hierarchy. The centre is successful and a no development option is plausible. However, we consider that LDDs should encourage modest growth if a suitable site within or on the edge of the defined boundary is identified. The important message for LDDs is to protect the vitality and viability of this important local centre.

## **Strategy for Local Centres in the Borough**

9.56 The designated centres in the borough are small and we do not expect or recommend any major development, due to the guidance on scale in PPS6 which states that local centres will generally be inappropriate for large-scale new development, even when a flexible approach is adopted. However, we consider that it is appropriate for these centres to absorb a small amount of growth in order to fulfil their function as local service centres. Therefore, we have allowed for a small proportion of the overall floorspace capacity in the borough to be directed to these centres, as summarised in Table 9.12.

**Table 9.12 Potential Long Term Strategy Outcome for Local Centres (combined)**

	2009- 2016	2009- 2021	2009- 2026
A1 comparison sqm gross	200	500	900
A1 convenience sqm gross (superstores/supermarkets)	0	0	0
A1 convenience sqm gross (small foodstores/deep discounters)	1,400	1,600	1,700
A1 service/A2 sqm gross	100	200	400
A3, A4 and A5 sqm gross	0	100	200
<b>Total sqm gross for A1-A5 uses</b>	<b>1,700</b>	<b>2,400</b>	<b>3,200</b>

Source: Appendix 8 (it is assumed that the A1 service/A2 requirements are 10% of the gross comparison requirements). Requirements are rounded to the nearest 100 sqm gross.

- 9.57 We do not consider it appropriate to plan specifically for this floorspace requirement to come forward in any one local centre. Instead, we expect that any application to meet these should be determined on its individual merits taking into account the considerations within Chapter 3 of PPS6, as specifically ensuring that the scale of any proposal relates to the role and function of the centre in the wider hierarchy. In other words, we expect these floorspace needs to meet local needs only throughout the borough.
- 9.58 Our terms of reference do not include any requirement to assess the development control policies for local centres, such as the proportion of retail frontages devoted to A1 use or similar. However, there is scope for an overarching policy to develop and strengthen these centres. Therefore, we suggest that LDDs incorporate the following key principles:
- Policies should build in flexibility that enables non-retail uses to occupy vacant retail premises, specifically enabling small and medium enterprises to establish a foothold in existing centres.
  - Mixed use developments with a small proportion of retail uses should be encouraged with the proviso that they accommodate local needs, they contribute to the vitality and viability of the centre and that they are directly related to the role and function of the centre.
  - The role and function of these centres should be protected and out of centre schemes that threaten the vitality and viability of local centres should be strongly resisted.

## Development Control Recommendations

- 9.59 The terms of reference for this study require a consideration of the defined town centre boundary for Woking town centre and the district and local centres. In addition, the extent of the primary shopping area for Woking town centre must also be assessed. The starting point for this exercise is Table 2 of Annex A in PPS6, which provides a definition for a town centre boundary (which applies equally to district and local centres) and a primary shopping area.
- 9.60 First, addressing the definition of a town centre boundary, PPS6 explains that it should include the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. Secondly, PPS6 explains that the 'primary shopping area' should be where retail development is

concentrated and generally comprises the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage.

- 9.61 Since we have recommended a revised hierarchy of centres, we base our assessment on Woking and our suggested district centre and local centres. The suggested revisions to the boundaries are attached at Appendix 11.

### *Woking Town Centre Boundary and Primary Shopping Area*

#### *Woking Town Centre Boundary*

- 9.62 The Woking town centre boundary in the 1999 Local Plan is extensive, in particular it includes a large area to the south and west that incorporates a number of residential properties and a number of other uses, such as hospitals and police stations that are not identified as main town centre uses in paragraph 1.8 of PPS6. Whilst it is appreciated that residential uses are appropriate in town centres (paragraph 1.9 of PPS6), we consider there is an opportunity to revise the town centre boundary in order to focus the area on the core town centre uses.
- 9.63 Whilst we consider the existing town centre boundary should be tightened due to existing range of town centre uses, our study has identified scope for significant growth in Woking town centre during the plan period. The focus of any new development for town centre uses should be within our amended boundary. However, we appreciate there are significant constraints in this area and thus we recommend an alternative option to include an expanded town centre boundary, which is consistent with the original boundary in the 1999 Local Plan. This is consistent with the sequential approach at paragraph 2.44 of PPS6, which states that all options in the centre (including, where necessary, an extension to the centre) should be thoroughly assessed before less central sites are considered for the development for main town centre uses. Thus, our two options are:
- **Option 1 RTP Recommended Boundary:** this is a tightly drawn around the existing town centre uses and is consistent with the guidance in Table 2, Annex A of PPS6
  - **Option 2 Existing Town Centre Boundary/Town Centre Expansion:** this adopts the 1999 town centre boundary and includes areas that potentially could be developed for town centre uses during the plan period should all options within our tighter recommended boundary be exhausted.
- 9.64 When defining our recommended amended boundary under Option 1, we have carefully considered the role of the Goldsworth Road regeneration area. This area is included within the existing town centre and we have included a large proportion of it within our amended town centre boundary, since it benefits from a mix of uses consistent with a town centre (i.e. office, retail and leisure uses) which are adjacent to the primary shopping area (which we discuss in the following paragraphs). The only element of the Goldsworth Road area we have excluded from the town centre is the Morrisons foodstore. We consider that this store suffers from a physical separation from the remainder of the town centre and in policy terms it performs as an edge of centre store.

### *Woking Primary Shopping Area*

- 9.65 Turning to the definition of the primary shopping area, we note that the 1999 Local Plan incorporates a 'Primary Shopping Area' and a 'Secondary Shopping Area'. PPS6 does not recognise these as separate areas and thus we recommend that the areas are amalgamated consistent with the advice in PPS6.

### *Defined Boundaries for District Centres and Local Centres*

- 9.66 As with Woking town centre, it is our view that the existing defined boundaries in the 1999 Local Plan for the district and local centres are drawn too wide compared to the guidance in PPS6. Therefore, in Appendix 11, we include revised boundaries for all these centres taking into the consideration the guidance in PPS6.

## **Monitoring Framework**

- 9.67 In order to satisfactorily deliver the suggested strategy, we suggest a Monitoring Framework. If implemented, this can then be used by the Council in order to keep the study up-to-date and enable informed decisions to be made on any retail or leisure proposals. PPS6 advises, in Chapter 4, that comprehensive, relevant and up-to-date monitoring is essential to the effective planning and management of town centres. Such monitoring can enable early signs of change in town centres to be identified and appropriate action to be undertaken.
- 9.68 Paragraph 4.3 of PPS6 states that the following matters should be kept under regular review:
- the network and hierarchy of centres (at both the regional and local levels);
  - the need for further development; and
  - the vitality and viability of centres (at the local level).
- 9.69 In relation to the first of these matters, paragraph 2.10 of PPS6 states, "... any significant change in role and function of centres, upward or downward, should come through the development plan process".

### *Monitoring Quantitative Outputs*

- 9.70 This study provides the Council with a set of floorspace requirements for the next 17 years, albeit with a caveat that limited weight should be afforded to the final five years of this timeframe. To establish whether the requirements for new floorspace (by type) are being met, the Council should monitor:
- Planning permissions (amount, type and location)
  - Completions (amount, type and location)
  - Changes of use that occur without the need for express permission
- 9.71 The recommendations set out in this report may need to be adjusted, in future, due to changing market conditions, demographic changes and the impact of developments elsewhere. They may also need to be adjusted if standard assumptions, such as those relating to expenditure growth and e-tailing, change. The role of monitoring is important in highlighting changes in the assumptions that underpin this study.

### *Monitoring Vitality and Viability*

- 9.72 The further matter to be kept under review is given the greatest coverage in Chapter 4 of PPS6. Accordingly we have examined the key vitality and viability indicators (outlined in paragraph 4.4 of PPS6), which we have applied in our healthcheck assessments in Section 3.
- 9.73 For most indicators, we suggest an annual monitoring frequency. In this way, the indicators can be monitored at the same time, which will prove useful since many of the indicators overlap with each other. It will also be more efficient in terms of human resources if the monitoring of indicators is undertaken at the same time. We recommend that the indicators are monitored at the same time of year, where possible, to assist with the compatibility of data.

### *Monitoring Woking Town Centre Boundary*

- 9.74 In our assessment of the town centre boundary for Woking, we have provided the Council with two options. Our recommended boundary (option 1) is drawn tightly around the existing town centre uses, whilst a town centre expansion (option 2) incorporates a wider area and utilised the existing boundary in the 1999 Local Plan. We consider town developments in the boundary under option 2 should be monitored carefully and the boundary of the town centre reviewed in five years.

Indicator	Data sources	Method for data collection	Monitoring frequency	Notes
Retail Rankings	Management Horizons Europe Index Shopping Index	Update for Woking, West Byfleet and Knaphill	Bi-Annually	The MHE Index is not published every year, however other sources could be used such as Javelin, although the scoring system is different.
Diversity of Uses	<ul style="list-style-type: none"> <li>GOAD, Town Centre Plans</li> <li>On-foot town centre surveys</li> </ul>	Update tables at <b>Appendix 2</b> to identify the quantity and frequency of each A-class retail use present. Compare to previous figures and similar centres. Also consider A1 comparison and convenience proportions.	Annually	GOAD plans are unlikely to be updated annually, but on-foot surveys could be carried out with this frequency. Typically limited changes occur annually, so annual monitoring should not require large resources.
National Multiples and High Profile Retailers	<ul style="list-style-type: none"> <li>GOAD, Town Centre Plans, Identified Key Attractors</li> <li>On-foot town centre surveys</li> </ul>	Consider balance of national multiples and independent retailers. Compare frequency of GOAD defined key attractors and high profile retailers to figures from study ( <b>Appendix 2</b> ).	Annually	GOAD plans are unlikely to be updated annually, but on-foot surveys could be carried out with this frequency.
Operator Demand	<ul style="list-style-type: none"> <li>FOCUS on-line database, <i>Retail Requirements - Town</i>, (<a href="http://www.focusnet.co.uk">www.focusnet.co.uk</a>)</li> </ul>	Identify new national retailers and leisure operators seeking space in each centre. Compare to <b>Appendix 2</b> and similar centres.	Annually	We understand FOCUS update their database monthly, but we recommend monitoring at the same time as the other indicators.
Retailer requirements	<ul style="list-style-type: none"> <li>FOCUS on-line database, <i>Retail Requirements - Town</i>, (<a href="http://www.focusnet.co.uk">www.focusnet.co.uk</a>)</li> </ul>	Identify new national retailers and leisure operators seeking space in each centre. Compare to <b>Appendix 2</b> and similar centres.	Annually	We understand FOCUS update their database monthly, but we recommend monitoring at the same time as the other indicators.
Retail Property Offer	<ul style="list-style-type: none"> <li>On-street observations</li> <li>Discussions with</li> </ul>	Make observations and discuss with relevant stakeholders/visitors whether notable positive or	Bi-annually	Unlikely that substantial change will occur year on year, so monitoring could be as frequently as every two



Indicator	Data sources	Method for data collection	Monitoring frequency	Notes
	stakeholders and visitors	negative contributions are made. Compare to comments made in <b>Appendix 2</b> .		years.
Retail yields	<ul style="list-style-type: none"> <li>Valuation Office, <i>Property Market Reports</i>, (<a href="http://www.voa.gov.uk">www.voa.gov.uk</a>)</li> </ul>	Update time-series data of yields (shown in <b>Appendix 2</b> ). Compare with comparable centres. Consider trends.	Annually	The Valuation Office produces Property Market Reports each year in January and July. Yield data is not typically produced for smaller town centres.
Zone A retail rents	<ul style="list-style-type: none"> <li>Colliers CRE's <i>In-Town Retail Rents</i>, produced each summer</li> <li>Commercial property agents</li> </ul>	Compile time-series data of rental movements (shown in <b>Appendix 2</b> ). Compare with comparable centres. Contrast rents within each centre - core to fringe.	Annually	Colliers CRE is the recognised industry source of published rents - figures are optimum Zone A rents. However, commercial agents often provide more accurate indicative Zone A rents.
Vacancy rates	<ul style="list-style-type: none"> <li>GOAD, Town Centre Plans,</li> <li>On-foot town centre surveys</li> </ul>	Update vacant units in <b>Appendix 2</b> and recalculate vacancy rates. Compare to figures in report.	Annually	PPS6 advises that vacancies arise in even the strongest centres. Care must be taken with this indicator. Key is long-term vacancies.
Accessibility	<ul style="list-style-type: none"> <li>On-street observations</li> <li>Discussions with stakeholders and shoppers</li> </ul>	Speak to stakeholders/shoppers regarding car access, congestion, car parking to each centre, train and bus access and frequency of usage. Compare with commentary from study.	Annually	Not a particularly quantifiable indicator. An attitudinal survey of pedestrians may be appropriate.
Crime levels and the fear of crime	<ul style="list-style-type: none"> <li>Surrey Police</li> <li>Discussions with traders, stakeholders and shoppers</li> </ul>	Compare trends in crime for the borough as a whole. Discussions with users/stakeholders in each town centre will provide further qualitative data on crime related	Annually	This indicator is less quantifiable than others.

Indicator	Data sources	Method for data collection	Monitoring frequency	Notes
		issues and the fear of crime.		
State of Environmental Quality	<ul style="list-style-type: none"> <li>• On-street observations</li> <li>• Discussions with stakeholders and visitors</li> </ul>	Make observations and discuss with relevant stakeholders/visitors whether notable positive or negative contributions are made. Compare to comments made in <b>Section 3</b> .	Bi-annually	Unlikely that substantial change will occur year on year, so monitoring could be as frequently as every two years.
Pedestrian flows	<ul style="list-style-type: none"> <li>• On-street footfall surveys</li> </ul>	Monitor the number of people moving in both directions, in different parts of each centre. Take counts over various days and times. Compare core to fringe locations.	Annually	No time-series data is presently available for this indicator. If footfall surveys are commissioned, updates must use same methodology to ensure comparability.
Customer attitudes	<ul style="list-style-type: none"> <li>• Discussions with shoppers and visitors</li> </ul>	Determine what shoppers/visitors identify as the strengths/weaknesses of each centre. Visitor surveys have been undertaken, as described in <b>Section 4</b> .	Annually	A standard pro-forma could be used to record issues through on-foot centre surveys and compared to the outputs in <b>Section 4</b> .