Surrey Heath Borough Council
Camberley Town Centre
Area Action Plan
Retail Report

January 2012

Prepared at the offices of

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APPENDICES

1. Introduction

1.1 Chase & Partners has advised Surrey Heath Borough Council for a number of years. Having initially undertaken the Surrey Heath Retail Study[1] in March 2007, we prepared a Supplementary Retail Report to the original Retail Study in December 2007 in order to inform the original draft of the Camberley Town Centre AAP[2]. In 2010 Chase & Partners were instructed to undertake an update of the Surrey Heath Retail Study[3].

1.2 Although these various studies have identified potential capacity for additional retail floorspace in the Borough generally – and Camberley in particular – in the period to 2021 and beyond, it is clear that the current economic downturn is likely to impose serious limitations on the potential delivery of this floorspace in the short-term (i.e. the next five years).

1.3 Having suspended work initial work on the Camberley Town Centre AAP in 2008, the Council have been instructed Chase & Partners to undertake:

(i) An updated assessment of the potential impact that the proposed levels of retail floorspace growth within Camberley Town Centre might have on the surrounding town centres and existing retailers;

(ii) A Town Centre 'Health Check' consistent with the Guidance set or in the Practice Guidance accompanying Planning Policy Statement 4: Planning for Sustainable Economic Growth; and

(iii) A study of the retail frontages to assist in the definition of primary and secondary retail frontages.

1.4 In addition to this Introduction the report comprises five further sections:

- **Section 2** provides a summary of the work undertaken to date on this matter and sets out the current position regarding the scale of future retail development envisaged in the town centre.

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1 Surrey Heath Retail Study Chase & Partners 2007
2 Surrey Heath Retail Study Update Chase & Partners – June 2010
3 'Camberley Retail Study – Supplementary Report for Camberley Town Centre Area Action Plan' Chase & Partners December 2007

- **Section 3** then presents an updated assessment of potential floorspace need in Camberley taking into account the latest, updated, local expenditure information and revised expenditure growth forecasts;

- **Section 4** then presents the results of our latest assessment of the health and vitality of Camberley town centre using the full range of "health check" indicators referred to in Annex D of PPS4 together with an objective assessment of its existing strengths and weaknesses.

- **Section 5** sets out our recommendations on the designation of primary and secondary frontages in Camberley town centres – having regard to both the findings of the health check and also changes that might be assumed to take place were the proposed development of the London Road block to proceed.

- **Section 6** then presents our conclusions and recommendations on a retail strategy to inform the Camberley Town Centre AAP.

2. Summary of Studies Undertaken to Date

2.1 The Surrey Heath Retail Study originally prepared by Chase & Partners in March 2007. It assessed the need for additional retail floor space in the Borough to 2016 and provided further guidelines on the level of floorspace that might be accommodated in the period to 2026, taking into account both quantitative and qualitative considerations.

2.2 In December 2007, Chase and Partners were requested to revisit the original Study and consider, in more detail, the potential level of comparison retail floorspace to be included in the Preferred Options report for the Camberley Town Centre Action Area Plan. In doing so regard was had to the prevailing strategic planning framework - at that time – that was contained in the adopted Surrey County Structure Plan and the emerging South East Plan.

2.3 The quantitative assessment contained in this Supplementary Report was based on the same population and expenditure figures used in the Surrey Heath Retail Study as well as the defined primary and secondary catchments areas used in the original analysis. The primary catchment comprises Zones 2, 4 and 5 of the original study (i.e. Camberley, Sandhurst, Yateley, Bagshot, Lightwater, Windlesham, Frimley, and Ash Vale). For ease of reference the study area zone plan used in the original study and in the Supplementary Report December is included at **Appendix 1**.

2.4 However, the Supplementary Report endeavoured to undertake a more transparent approach towards the calculation of potential future comparison floorspace requirements than the original report – paying particular regard to the likely impact that any possible changes in the market share in both its primary and secondary catchment areas might have on future floorspace need in Camberley town centre. It established a “baseline” position for future comparison retail floorspace requirement in Camberley town centre. Based on the projected levels of expenditure growth at that time – and assuming the town centre maintained its existing market share in both its primary catchment and secondary catchment area - and then making an allowance for the likely effect of future increases in the efficiency of existing town centre floorspace, the analysis indicated that there was a potential floorspace requirement for an additional

13,613 sq metres of net new comparison floorspace by 2016[4], rising to 21,864 sq metres by 2021, and 32,197 sq metres by 2026.

2.1 The report then went on to consider scenarios for potential additional retail floorspace capacity based on differing assumptions about levels of future market share that *might* be achieved by Camberley in the future. This 'scenario testing' considered the possible effect on future floorspace need if Camberley town centre were to increase its market share in its primary catchment by 5% (i.e. from 18.14% currently to 19.04%) and by 10% (i.e. from 18.14% to 19.9%). In both cases it was assumed that market share of 4% in the secondary catchment remained constant throughout.

2.5 In the most 'bullish' of these scenarios – where it was assumed Camberley town centre increased its market share in the primary catchment by 10% and maintained existing secondary catchment market share – there was potentially capacity to support an additional 21,471 sq metres of net comparison floorspace area by 2016, rising to 35,179 sq metres by 2021 and 52,330 sq metres by 2026.

2.6 This Assessment concluded that, even taking into account the Atrium development (that was then under construction), there was likely to be considerable need for additional comparison floorspace in Camberley during the period to 2026.

2.7 The potential floorspace requirements arising from this analysis were summarised in Table 4 of the Supplementary Assessment; this is reproduced overleaf for ease of reference.

4 All these figures exclude the Atrium development; the report stressed that allowance would need to be made for the comparison floorspace in this scheme order to derive a figure for the *additional* comparison floorspace that could be included in the Preferred Options for the Camberley Area Action Plan.

Table 1: Camberley Town Centre AAP – Summary of Potential Floorspace Requirements as at December 2007

	Comparison Floorspace Need (sq metres)					
	2016		2021		2026	
	Gross	Net	Gross	Net	Gross	Net
Based on consistent Market Share 2006-2021	20,940	13,613	33,640	21,864	49,530	32,197
5% increase in market share in existing primary catchment	26,990	17,542	43,880	28,522	65,020	42,263
10% increase in market share in existing primary catchment	33,030	21,471	54,120	35,179	80,500	52,330

Source: Table 4 of Surrey Heath Retail Study – Supplementary Report for Camberley Town Centre AAP – December 2007

2.8 The scale of additional comparison floorspace need identified in each of these scenarios, led Chase & Partners to recommend that the Council, through its Area Action Plan, to identify a site, or sites, within Camberley town centre that were potentially able to accommodate a major retail development that could be brought forward during the Plan period.

2.9 Our advice was reinforced by the view that the continuing attractiveness of other competing centres nearby and existing out-of-centre facilities in the area, combined with potential developments in neighbouring town centres (such as Bracknell and Guildford), meant that it would be important for the Council to take steps to bring forward further retail development within Camberley town centre if it is to maintain its attractiveness as shopping destination. Such development would enhance the attractiveness of Camberley town centre as a shopping destination - entirely consistent with Camberley's designation as 'second tier' centre in the adopted Structure Plan and a 'Secondary Town Centre' in (what was then) the emerging South East Plan. Without such development, there was a risk that Camberley's market share in both its primary and secondary catchment would decline during the plan period and this could, in turn, affect the vitality and viability of the centre.

2.10 Chase & Partners also believed that major new development also offered the potential for Camberley to increase market share within in its primary catchment and, in doing so, further increase the future floorspace need but without necessarily affecting centres in the wider area.

2.11 Having undertaken initial consultation on Issues and Options in 2007, the Council consulted on its Preferred Options for the Camberley Town Centre AAP in 2008. Chapter 5 set out the Council's preferred option for improving shopping facilities and its policy to provide additional floorspace capable of increasing Camberley's market share in its primary catchment by 10%. Taking the existing commitment at the Atrium into account, this meant that there was a potential need for an additional 41,350 sq metres gross comparison floorspace in Camberley town centre by 2021 and that the London Road Block presented the best opportunity to provide this space in the plan period.

2.12 This was set out in **Preferred Policy TC 3**: Improving Shopping Facilities – this stated:

Preferred Policy TC 3: Improving Shopping Facilities

1. *The Council will make provision for up to 41,350 sq metres of net additional comparison goods floorspace within the Town Centre up to 2021.*

2. *The main focus for additional comparison and convenience floorspace will be the London Road Block and thereafter the remainder of the Primary Shopping Area and the Secondary Shopping Frontage*

3. *New retail floorspace, including restaurants and other 'A' uses, will only be permitted within the Primary Shopping Area and the Secondary Shopping Frontage.*

2.13 Representations on these Preferred Options contained both support and objections to **Preferred Policy TC3** – most notably from neighbouring Rushmoor Borough Council that was concerned about the quantum of floorspace being proposed and the potential cumulative impact that this would have on the vitality and viability of Farnborough and Aldershot town centres and their possible future development and on the wider retail hierarchy of the local area.

2.14 In 2009, Chase & Partners were then commissioned to provide further advice to the Council on the Growth Options for both the Core Strategy and the CTCAAP in the light of the deteriorating economic conditions. Our assessment concluded that, with declining growth in expenditure and rising vacancies in the town centre at that time, the immediate need for additional comparison floorspace was likely to be reduced and, perhaps more significantly, market conditions meant that development interest was likely to be subdued.

2.15 Although there remained a strong quantitative need for further retail development in Camberley town centre, the Council would need to be realistic in both the Core Strategy and in the CTCAAP on the likelihood of bringing forward new development in the town centre – at least in the short term (i.e. to 2016).

2.16 Further work on the CTCAAP was suspended in 2009 while the Council concentrated on the Core Strategy and Development Management Policies DPD; this was duly submitted to the Secretary of State in July 2010.

2.17 **Draft Policy CP10** of the Submission Draft of the Core Strategy carried forward the provisions of CTCAAP – although it, mistakenly, envisaging some 41,350 square metres of net new additional retail floorspace. Otherwise the policy reflected the provisions of the earlier CTCAAP and its expectation that Camberley would increase its existing market share in the primary catchment by 10%. However, the Submission Draft of the Core Strategy envisaged this floorspace being delivered in the period up to 2027 rather than 2021 – the date referred to in the draft CTCAAP. The basis on which the timeframe for delivery of this floorspace was altered is not clear.

2.18 An objection was received to **draft Policy CP10** from Rushmoor Borough Council. This reiterated the Council's earlier concerns about:

- the potential effect of Camberley increasing its market share in the primary catchment area and how this would potentially reduce available expenditure needed in the future and in doing so prejudice regeneration of Farnborough and Aldershot;

- the effect the proposed floorspace in Camberley could have on the future viability and vitality of Farnborough and Aldershot town centres; and
- "upsetting the balance" of the retail hierarchy between other centres in the Blackwater Valley.

Rushmoor Borough Council would seek to restrict the retail floorspace proposed in Camberley town centre to that identified in the Surrey Heath Retail Study under the scenario that envisages no increase in market share in the primary catchment.

2.19 In 2010, in advance of the examination of the Core Strategy & Development Management DPD, Chase & Partners were commissioned to update the original Surrey Heath Retail Study and this now forms part of the evidence base of the Local Development Plan.

2.20 This Updated Assessment used the latest population and expenditure figures for the Study Area and also applied the most up-to-date per capita expenditure forecasts available at that time in order to reflect the effect the economic downturn was already having on future spending patterns.

2.21 It considered potential future floorspace requirements based on the same scenarios outlined in paragraph 2.3 above. The findings on future floorspace need in Camberley town centre were set out in Tables 16-18 of the Surrey Heath Retail Study Update and are reproduced overleaf for ease of reference.

2.22 The Retail Study Update shows a reduction in the total quantum of comparison floorspace need from that originally set out in the Supplementary Assessment and duly quoted in both the draft CTCAAP and Core Strategy. This was, in part due to the exclusion of the Atrium development (which now, of course, has been completed), but also reflected the effect of the economic downturn on consumer confidence and future expenditure growth – particularly in the short term. Nonetheless, the Updated Assessment still demonstrates the potential for significant floorspace growth in Camberley in each of the three scenarios in the period to 2026.

Table 2: Camberley Town Centre AAP – Potential Floorspace Requirements as at December 2010

	Comparison Floorspace Need (sq metres)					
	2016		2021		2026	
	Gross	Net	Gross	Net	Gross	Net
Based on consistent Market Share	6,483	4,538	18,444	12,956	38,756	27,129
5% increase in market share in existing primary catchment	11,661	8,163	25,040	17,528	47,383	33,168
10% increase in market share in existing primary catchment	16,840	11,788	31,634	22,142	56,010	39,207

Source: Tables 16-18 in Surrey Heath Retail Study Update 2010

2.2 Finally, in the interests of completeness it should be noted that neither the original Surrey Heath Retail Study or the Update indicated that future expenditure growth on convenience goods meant justified substantive need for new convenience floorspace in Camberley in the immediate future. Any quantitative need for further convenience floorspace in the area was only likely to be realised towards the end of the Plan period.

3. Updated Need Assessment

3.1 In order to maintain a degree of consistency with the previous studies Chase & Partners have used the same population and expenditure data wherever possible. We have also continued to use a design year of 2010 and provided future floorspace estimates for 2015, 2020 and 2026 consistent with these studies.

3.2 This Assessment also provides extrapolated floorspace figures for 2028 - consistent with the end date for the AAP. However, we are compelled to say that a great deal of caution should be exercised when considering floorspace figures over such extended future timescales.

3.3 Time and budgetary constraints also mean that we have not commissioning a new household survey to inform this new Assessment and we have therefore used the results of household survey undertaken in 2006 to support the original Surrey Heath Retail Study.

3.4 Current economic conditions mean that estimates of future personal expenditure growth now need to reflect the most recent estimates that take into account both the economic downturn since the 2010 Update was undertaken and the outlook for future expenditure growth over the period of the AAP.

3.5 Our assessment concentrates exclusively on comparison floorspace; the detailed tabulations are set out in **Appendix 2**. The methodology and its main outputs are summarised below.

3.6 Once again it should be stressed that this Assessment of quantitative need has been undertaken to inform the Council's plan-making process and how much additional floorspace the Council should be planning for in preparing the AAP for the town centre. Like the Surrey Heath Retail Study and the Update that succeeded it, it adopts a "broad-brush" approach towards future comparison floorspace need in the town centre.

3.7 It is important to stress that the Assessment it does not take any account of:

(a) the physical capacity of existing infrastructure in and around Camberley town centre to necessarily accommodate the level of new retail floorspace envisaged in this assessment:

(b) the capacity of a specific site (or series of sites) in the town centre to accommodate the level of additional floorspace envisaged;

(c) the potential development requirements of individual retailers or specific occupiers for new development in Camberley; and/or

(d) the aspirations of any developer to promote new development in the town centre; and/or

(e) the potential viability of any specific development scheme.

These issues, in our experience, can only be considered and adequately addressed as part of the detailed assessment accompanying specific planning application for a particular scheme at the time it is made. This Assessment, nonetheless, would still provide the context within which any such proposal would need to be assessed.

Population Growth

3.8 The same population and expenditure data for the study area used in Retail Study Update has been used. It is based on Mapinfo Anysite Report commissioned by Chase & Partners in May 2010 and is based on 2001 Census; in order to maintain consistency with previous studies the expenditure data is, once again, expressed in 2009 prices.

3.9 The population of the study area as a whole is due to increase as follows:-

Table 3: Study area population growth 2010-2028

Year	Population
2010	481,340
2015	495,884
2020	509,981
2026	524,302
2028	530,030

Source: Pitney Bowes MapInfo; population for 2020 onwards extrapolated on basis of average annual increase projected for 2010-2019

3.10 MapInfo only provide population data up to 2019, whereas for AAP requirements, the Assessment must examine potential quantitative need up to 2028. For the purposes of this exercise we have assumed that population growth rates for the period 2010-2019 will continue to 2028.

3.11 It should be noted that these figures are based on natural population growth. Like the previous studies it does not include any increase arising as a result of new large-scale housing allocations. This would seem to be a particularly appropriate and robust approach given the environmental constraints on major new residential development in and around Surrey Heath combined with the current state of the economy and the housing market which is likely to inhibit major new residential development – certainly in the short-medium term.

Comparison Goods Expenditure

3.12 Chase & Partners has used the above population projections together MapInfo's estimates of existing comparison expenditure forecasts to estimate existing levels of comparison expenditure in the area.

3.13 Total comparison goods expenditure per capita in Surrey Heath in 2009 was estimated by MapInfo to be £4,067 (in 2009 prices). In contrast to the Retail Study Update we have then used new estimates for future expenditure growth based on the latest information contained in Mapinfo's latest Retail Expenditure Guide[5] over five-year periods to 2028.

3.14 Tables 2-7 of **Appendix 2** set out the relevant population and expenditure data for comparison goods in Surrey Heath for 2010, 2015, 2020 and 2026 as well as 2028 – see **Table 4** overleaf.

3.15 Growth in expenditure on comparison goods across the study area in the period between 2010 to 2026 (consistent with the period for the Updated Retail Study) is considerable - at some £1,875.7m. This figure is, however, marginally lower than that found in Table 13 of the Retail Study Update and reflects the more conservative expectations about future expenditure growth in the light of current economic conditions. Nonetheless, these latest projections continue to demonstrate a substantial growth in future expenditure available for comparison goods in Surrey Heath area during the life of the AAP.

Table 4: Comparison Expenditure

Year	Population	Expenditure per capita (excl SFT) (£)	Total Convenience Expenditure	Growth
2010	481,340	£4,067	£1,957.6m	-
2015	495,884	£4.754	£2,357.3m	£399.7m
2020	509,981	£5,778	£2,946.8m	£589.4m
2026	524,302	£7,311	£3,833.3m	£886.5m
2028	530,030	£7,908	£4,191.5m	£358.2m

Source: Pitney Bowes MapInfo; Tables 2-6 of Appendix 2 and Table 17 (for 2028 only)

3.16 As we have previously advised, a degree of caution must be employed when projecting expenditure growth over such extended periods. Although greater reliance can be placed on forecasts for the short/medium term (i.e. the period to 2015), estimates beyond this period must be treated with a certain degree of caution (particularly given current economic conditions) and, in line with the advice contained in the Good Practice Guidance accompanying PPS4, ideally revisited over the next five years as part of any review of either the LDF and/or the AAP.

3.17 Growth in comparison expenditure would, of course, be available to support both existing and any additional floorspace in Camberley. In order to gain an insight into the level of expenditure growth that could be considered available to support existing and any future floorspace, it is necessary to establish an estimate of turnover currently being achieved by the existing floorspace in Camberley, and by other facilities in the wider area, based on the results of the household survey.

3.18 Tables 8-15 in **Appendix 2** rework the expenditure flows contained in the same Tables of the Retail Study Update. These are now based on the revised estimates of future comparison retail expenditure in order to identify likely future flows of expenditure for the eight defined product categories from each of the study area zones.

[5] Expenditure per capita is anticipated to grow in line with actual annual rates to 2011 as shown in Table 3.2 of Pitney Bowes Retail Expenditure Guide 2011/12 and then in line with Oxford Economic Forecasts in Table 3.3 of Expenditure Guide. Growth beyond 2016 assumed @ 4% pa for comparison goods

3.19 Table 16 in **Appendix 2** then summarises the turnover of Camberley town centre. It should be noted that these eight product categories do not cover 100% of all comparison goods expenditure and also, of course, exclude convenience expenditure; as a result the turnover figure in this table will be underestimates and should not be seen as an estimate of Camberley's total turnover.

3.20 Camberley's comparison turnover based on the household survey is estimated to be in the region of £280m - with just short of £100m arising from Zone 4; this represents a retention rate of just over 30%. On the positive side this suggests that Camberley attracts a significant amount of comparison expenditure from further afield - notably Zone 2 (Bagshot/Lightwater and Windlesham), Zone 5 (Frimley/Ash Vale), Zone 6 (Farnborough/Cove) and Zone 9 (Crowthorne).

3.21 However, the figures also reflects a considerable "leakage" of local comparison expenditure from Camberley and its immediate environs to other locations. These are identified in Table 18 in **Appendix 2** and include, amongst others, the stores at Blackwater Valley (notably Tesco Extra and Marks & Spencer) which attract some £26m from Zone 4 and Farnborough's town centre and retail parks attract a further £49m. The internet and mail order companies attract £24m from Zone 4 – over 7% of the total pool of comparison expenditure. Kingston, Guildford and Woking are also recipients of a significant amount of Zone 4's expenditure.

3.22 Table 20 of **Appendix 2** shows that Camberley's total town centre turnover (for comparison goods) is estimated as follows:

Table 5: Camberley Town Centre Turnover

Year	Turnover
2010	£278.9M
2015	£335.9M
2020	£419.9M
2026	£546.2M
2028	£597.2M

Source: Table 20, Appendix 2

3.23 Turning to future floorspace requirements for Camberley, we have based our assessment on the assumption that Camberley maintains its existing market share, i.e. the level of future floorspace “need” that is potentially required for Camberley to simply maintain its share of a rising quantum of retail expenditure in the study area.

3.24 Applying the figure for 2010 to the known quantum of comparison goods floorspace in Camberley (Table 19, **Appendix 2**) allows us to calculate the town’s turnover per square metre ratio as £8,356/sq metre. This is a marginally lower figure than that estimated in the Retail Study Update, probably reflecting the continuing effect of the economic downturn on existing comparison retailing in Camberley town centre.

3.25 In accordance with advice contained in the Good Practice Guidance accompanying PPS4, Chase & Partners has then made an allowance for increased efficiency in existing town centre floorspace. As with the Retail Study Update, we have applied a floorspace efficiency figure of 1% per annum to the period 2010-15. However, on the basis that this is likely to diminish over time and retailers cannot continue to increase their efficiency indefinitely, we have applied an increase in efficiency of 0.5% to 2016-20 and no further efficiency gains beyond this point. Taking all this into account, our model estimates the following floorspace requirement for Camberley town centre based on its existing market share in its primary catchment area.

3.26 In order to translate the net floorpsace figures from the Assessment into a gross external floorspace requirement one has to employ some form of net; gross ratio. As with previous studies a figure of 70% has been assumed in this instance. The potential comparison floorspace requirements are summarised in Table 6 below. It is important to stress, however, that using such generic net: gross ‘conversion rates’ should be treated with a good degree of caution as there can be considerable variation in the detailed design of specific development proposals.

Table 6: Revised Floorspace Requirement for Camberley 2010-26 (assuming constant market share)

	2010-2015		2016-2020		2021-2026		2026=2028	
	Gross	Net	Gross	Net	Gross	Net	Gross	Net
Sqm	7,304	5,113	11,919	8,343	21,595	15,116	8,723	6,106
Sq ft	78,623	55,035	128,291	89,802	232,435	162,705	93,890	65,723

Source: Table 20, Appendix 2

3.27 Despite the use of more conservative expenditure growth rates, it can be seen that the potential quantum of additional comparison floorspace required in Camberley town centre during the timeframe of the AAP is considerable, even over the first part of the plan period. It suggests that there this need for something in the order of 19,220 sq metres gross/13,460 sq metres net of new comparison floorspace in the period to 2020, and a further 30,320 sq metres gross/21,220 sq metres net of new comparison floorspace in the period to the AAP end date of 2028. Were expenditure growth rates to improve from those currently envisaged then this potential comparison floorspace requirement could increase further.

Increase in Camberley's Market Share

3.28 In contrast to our previous work[6], it should be stressed that these estimates of potential floorspace need are based on constant market shares. They do not reflect the potential requirement if Camberley town centre to increase its market share in the Study Area during the life of the AAP.

3.29 The estimates set out in Table 6 are based on Camberley town centre simply maintaining the level of market share it currently achieves within its catchment. In contrast to both the original Surrey Heath Retail Study and the 2010 Update no allowance has been made for any potential increase in market share that the town centre might achieve as a result of new development taking place and its attractiveness as a retail destination being enhanced during the period of the AAP. On this basis these figures should be viewed as a conservative assessment of likely future floorspace need in Camberley town centres during the period of the AAP. They are essentially predicated on Camberley town centre 'holding its

6 Notably the Supplementary Retail Report to the original Retail Study undertaken in December 2007 and the Retail Study Update undertaken in 2010

own' in the retail hierarchy in the future based taking into account latest projections on future retail expenditure growth.

3.30 Moreover, given the relatively high level of turnover:floorspace in Camberley town centre, delay or failure to provide additional comparison floorspace to meet future expenditure need could lead to the town centre losing market share to other centres nearby as well as to out-of-centre developments in the area. As well affecting the future vitality and viability of Camberley town centre, it could also lead to, or encourage, unsustainable travel patterns amongst consumers when shopping for comparison goods.

Impact on Nearby Town Centres

3.31 The approach being adopted in this report seeks to respond to concerns raised in relation to the Core Strategy – particularly by Rushmoor Borough Council - and specifically how, if new development in the town centre were to lead to Camberley town centre significantly increasing its market share, then this could affect the future viability and vitality of nearby town centres such as Farnborough and Aldershot town centres and future regeneration planned there.

3.32 It is worth remembering that based on the results of the latest household survey that while Camberley town centre currently retains a significant percentage of expenditure from its immediate hinterland for fashion, soft furnishings, homewares (china, glass, hardware) and luxury goods categories, it is a less attractive destination for DIY shopping, audio visual goods, domestic appliances, furniture and floor coverings, where out of town retail warehouses, notably those at Farnborough such as B&Q, Comet and Currys tend to dominate[7]. Residents from Camberley therefore are already visiting other centres nearby (as well out-of-centre facilities) when undertaking their comparison shopping, and are likely to continue to do so in the future.

3.33 When considering the possible impact that the level of floorspace envisaged in this report might have on nearby centres, one must have regard to the fact that proposals already exist for future development and enhancement of both Farnborough and Aldershot town centres.

[7] See section 4 of the Surrey Heath Retail Study Update June 2010

3.34 In Farnborough, for example, the first phased of The Meads development has already seen the opening of a new Sainsbury's store, 12 retail units as well as Gala Bingo and new Travelodge Hotel. There are plans for further phases but these are currently 'on hold' due to the economic downturn but are expected to be reactivated once market conditions improve.

3.35 The Farnborough Town Centre SPD[8] also sets out the Council's vision and key objectives for the town centre over the next 10-15 years. It identifies further potential development sites that could be brought forward for development during the life of the Camberley AAP.

3.36 Similarly in Aldershot, after a number of aborted redevelopment attempts in the late 'nineties for the redevelopment of the Westgate site, planning permission was granted in 2010 for a new mixed retail and leisure development anchored by Morrisons; this is currently under construction and, when complete, will enhance Aldershot as a retail and leisure destination. In the longer term, the Aldershot Town Centre SPD[9] also sets out a wider vision for the environmental and physical improvement in the town centre during the next 10-15 years. It identifies a number of further schemes for urban improvement to further enhance the town centre.

3.37 These development proposals in both Farnborough and Aldershot will enhance both as retail destinations during the life of the Camberley Town Centre AAP. They will make these centres more attractive to residents in the Camberley area and also those consumers who currently undertake comparison shopping in Camberley town centre. This would further reduce the (relatively low) level of market share Camberley currently achieves in its primary catchment.

3.38 The levels of new floorspace envisaged in this report in Camberley town centre are based on the centre simply ***maintaining*** its existing market share in the future in what will be an increasingly competitive marketplace. Accordingly they are simply predicated on Camberley town centre 'holding its own' in the period of the AAP and maintaining its position in the established retail hierarchy consistent with the aims of the Adopted Core Strategy.

[8] Farnborough Town Centre SGD Rushmoor Borough Council July 2007

[9] Aldershot Town Centre SPD Urban Improvement Strategy – Rushmoor Borough Council January 2009

3.39 The floorspace figures envisaged in this report would not "upset the balance" in the area in the way that has been previously alleged in that they do not assume any growth in local market share. Accordingly, there can be little basis to any objection from adjoining authorities that the potential quantum of new comparison floorspace envisaged will cause demonstrable harm to nearby centres which are, themselves, seeking to attract new investment and retail development over a similar timeframe.

5.28 The quantum of potential retail floorspace identified in this report provides a framework for both the AAP and also future retail development proposals in Camberley town centre. However, it would still remain incumbent on any applicant promoting such development in the future to demonstrate, to the satisfaction of the Council, that the proposed development would not cause serious adverse effects - to the health and vitality of Camberley town centre and other town centres nearby – having regard to the nature, scale and specific form of development proposed.

5.29 Finally it should be stressed that the level of floorspace need identified in this Assessment does not necessarily equate to actual commercial demand. In our view, there is little point in the Council planning for additional floorspace in Camberley if there is no clear commercial demand and/or the market is unable or unwilling to deliver.

5.30 Clearly if there is demand for new development in the town centre then the AAP has a critical role in seeking to accommodate it. In doing so, however, it is not simply a matter of accommodating the level of floorspace envisaged in this report, but also having regard to the form and likely content of the development as well as the quality of the development, public realm and how it can be incorporated into the existing centre in a way that enhances the town centre *as a whole* as a retail destination. These are matters that the AAP will need to consider both strategically and on a site specific basis in due course.

4. Town Centre Health Check

4.1 Chase and Partners undertook a survey of Camberley in 2006 in order to assess the health and vitality of the town centre for the Surrey Heath Retail Study. A further survey was then taken in April 2010 as part of the Retail Study Update.

4.2 The results of these two surveys are compared and contrasted below together with those of a new survey conducted in 2011 in order to assess patterns in the relative health and vitality of the town centre in recent years. Where reliable information is available we have endeavoured to assess the vitality and viability of the centre using the indicators outlined in Annex D of Planning Policy Statement 4 “Planning for Sustainable Economic Growth” (PPS4). These are:-

- Diversity of main town centre uses;
- Amount of retail, leisure and office floor space in edge and out of centre locations;
- Potential capacity for growth, or change of centres in the network;
- Retail representation and intentions to change representation;
- Proportion of vacant street level property and length of time properties have been vacant;
- Commercial yields;
- Land values and the length of time key sites have remained undeveloped;
- Pedestrian flows;
- Accessibility;
- Customer and resident views and behaviour;
- Perception of safety and occurrence of crime; and
- State of the town centre environmental quality.

Diversity of Uses

4.3 Based on our street survey conducted in December 2011 there are currently 265 units trading in Camberley town centre, the composition of which is shown in Table 1 below.

Table 7: Uses in Camberley Town Centre

	Units			Floorspace			
Category	**Number of Units**	**%**	**National Average (%)**	**Sq m**	**Sq ft**	**%**	**National Average (%)**
Convenience	11	4	9	3,688	39,700	6	17
Comparison	119	45	41	33,380	359,300	57	47
Service	98	37	35	12,421	133,700	21	23
Vacant	37	14	14	8,649	93,100	15	12
Total	**265**	**-**	**-**	**58,138**	**625,800**	**-**	**-**

Source: Experian Goad (**Appendix 3**) and Chase & Partners street survey December 2011

4.4 Table 1 shows that Camberley is primary a comparison goods shopping destination, with a strong service offer provided by banks, building societies, pubs and restaurants. The figures for both the number of units and the overall floor space show a much lower than average convenience goods offer explained by the fact that the town centre lacks a major food superstore or supermarket – the Sainsbury's store at Cambridge Walk in the Mall Shopping Centre has a sales area of only 13,444 sq ft and the Lidl store has approximately 7,000 sq ft.

Table 8: Uses in Camberley Town Centre in April 2010

	Units			Floorspace			
Category	**Number of Units**	**%**	**National Average (%)**	**Sq m**	**Sq ft**	**%**	**National Average (%)**
Convenience	10	4	10	4,311	46,400	8	17
Comparison	122	50	43	30,166	324,700	53	49
Service	59	24	34	11,371	122,400	20	22
Vacant	52	21	12	11,018	118,600	19	11
Total	**243**	**-**	**-**	**56,866**	**612,100**	**-**	**-**

Source: Experian Goad (**Appendix 3**) and Chase & Partners Street Survey April 2010

4.5 As Table 2 above shows, during the intervening year and a half since the Retail Study Update was published, the situation within Camberley town centre has clearly improved, despite the prevailing tough retail trading conditions. Although the number and level of comparison goods retailers, one hallmark of successful town centres, has diminished, the proportion of comparison goods retailers within the centre is still above the national average. Furthermore, the level of vacant units and floorspace within the centre has fallen substantially.

Retail Floor Space in Edge of Centre and Out of Centre Locations

4.6 Camberley's main out of centre retail destination is the Tesco Extra/Marks and Spencer development at The Meadows. This consists of circa 260,000 sq ft of retail floorspace and is a major destination for both comparison and convenience shopping. The household survey results from the Camberley Retail Study showed that 42% of food shopping trips originating in the Camberley area are undertaken at this Tesco store.

4.7 Camberley has very little in the way of edge of centre floorspace. In this way, the retail area is clearly defined.

Potential for Growth

4.8 Camberley has considerable potential for growing its retail offer, in the sense that there is physical space available. PPS4 (Annex D) advises that the potential capacity for growth is "typically measured in the amount of land available for new or more intensive forms of town centre development". Camberley's capacity arises from the availability of existing space and from an obvious opportunity to make more efficient use of the existing shopping centre.

4.9 At the time of our survey in December 2011, the Atrium development still had some large units available to let. Along the length of Park Street a total of eight retail units are currently unoccupied – though this flexible retail floor space could easily be combined or sub-divided according to the needs of the market. These retail units add up to approximately 22,070 sq ft gross floor space available at ground floor alone. In addition, there are further vacancies throughout the centre, although not all are modern, well serviced floorspace in such prominent locations. In all there is circa 93,100 sq ft of vacant space in Camberley according to the Goad Centre Report, attached at **Appendix 3**. This is immediately available space into which Camberley's retail and service offer could grow.

4.10 In addition to this, there is considerable scope for improving the efficiency of the Mall shopping centre. Examination of the shopping centre at the time of the Surrey Heath Retail Study revealed that it includes extensive service areas into which it would be possible to extend which is still the case today. Beyond this, in the London Road Block there is the potential for extension of the centre or more comprehensive redevelopment, possibly to provide multiple level trading.

4.11 Chase & Partners are aware that the owners of the Shopping Centre have considered such development in the past, though their ambitions were stymied by the recession. In terms of physical space, however, there is considerable potential for growth for further development in Camberley town centre via this route.

Retailer Representation and Intentions to Change Representation

4.12 The level and quality of existing retailer representation provides a measure of the strength of any centre. **Appendix 3** shows the location of national multiple retailers throughout Camberley town centre and **Appendix 4** lists the national multiple retailers currently present there. There are currently 130 multiple national retailers within the Camberley which compares well against a total of 102 and 103 when the previous surveys were undertaken in 2006 and 2010 for the retail study and retail study update respectively. It is clear that the town centre has improved greatly in the last year which is a major fillip given the difficult trading period in which the rise has taken place.

Table 9: Fashion Retailers in Camberley

2006	2010	2011
Accessorize	Accessorize	Accessorize
Bay Trading Company	Claire's Accessories	Blue Inc
Burton	Esprit	Clare's Accessories
Claire's Accessories	La Senza	Esprit
Dorothy Perkins	Monsoon	H&M
Figura at Contessa	Moss	La Senza
M & Co	New Look	Laura Ashley
Monsoon	Next	Monsoon
New Look	Primark	Moss
Next	River Island	New Look
Primark	Top Shop/Top Man	Next
Principals		Primark
River Island		River Island
The Officers Club		Top Shop/Top Man
Top Shop/Top Man		Utd Colours Benetton
USC		Westone

4.13 The number and variety of well known high street fashion retailers is regarded as a further key indicator of the attractiveness of any centre, both to shoppers and retailers alike. The table above shows that Camberley has regained the level of multiple national fashion retailers that were present back in 2006. Furthermore, it could be argued that many of the new entrants such as Esprit, H&M and United Colours of Benetton are higher end retailers than those that have since left the centre, further improving its attractiveness. It should also be noted that the House of Frazer department store is included in the list above but clearly adds to further choice to the fashion offer available in Camberley.

4.14 The Atrium, and in particular the cinema and bowling alley, has given Camberley a focal point for its leisure offer and attracted Bella Italia, Chiquito, Estilo, Frankie & Bennys, Nando's, Prezzo and Wagamama as a result. The leisure representation has therefore greatly improved, in recent years also.

4.15 Another important factor in assessing the retail health of any centre is demand for space from retailers. The table below sets out the number of published requirements for national multiple retailers as recorded by the commercial property database Focus over the last 10 years.

Table 10: Published Retailer Requirements 2000-2010

Date	Number of Requirements
January 2010	29
April 2009	39
January 2009	46
October 2007	69
April 2007	77
October 2006	81
April 2006	84
October 2005	88
April 2005	78
October 2004	72
April 2004	70
October 2003	78
April 2003	83
October 2002	81
April 2002	75
October 2001	67
April 2001	67
October 2000	62
April 2000	61

Source: Focus database

4.16 We would not claim that this is comprehensive – retailers may be tempted into the centre by the availability of the right unit in the right location. Furthermore, the Focus database does not record demand from the independent retail sector. Nevertheless, it is a good guide to overall demand for space.

4.17 The figures show a healthy level of "in principle" demand from 29 retailers currently. In an economic environment where retailers have been extremely cautious in their property strategies, 29 is a respectable figure. It should be noted however, a sharp decline from the pre-recession era when number of requirements was in the 70s and 80s.

4.18 Analysis of the range of retailers presently seeking space in Camberley reveals a substantial number of High Street operators such as Brighthouse, Hatton Goldsmiths, Lakeland, Millies Cookies, Peacocks, Pets At Home, Poundstretcher and Storm Clothing. This is a positive sign as it demonstrates that many high profile brands still see the town as a viable trading opportunity.

Vacancies

4.19 **Appendix 3** also shows the location of vacant retail property in Camberley town centre at the time of our survey in December 2011. The plan shows that there are currently 37 vacant units, representing 14% of the total stock, which is in line with the UK national average. However, according to the Goad Centre Report for Camberley (attached at **Appendix 3**) the proportion of vacant floor space was marginally higher than the national average in May 2011 when Experian undertook their survey.

4.20 **Appendix 3** shows that in general the vacant units are evenly distributed throughout the town centre, which suggests they are mainly the result of the structural turnover of units rather than indicating that any particular areas or parades within the centre are failing. There is still a grouping of vacant units within The Atrium centre, particularly north of St Mary's Road, although this has improved since our last survey with the opening of Esprit, H&M, Laura Ashley and United Colours of Benetton. In addition to those vacancies depicted on the plan at ground floor level, much of the retail space on the upper floors of The Atrium also remain vacant.

4.21 In addition to the grouping within The Atrium, there is a collection of six vacant units within the north east corner of the town centre which is another slightly weaker area. Since the time of our last survey, the former Allders store has been let to both the British Heart Foundation and Circle 7. The unit had been vacant for a number of years which lead to a substantial amount dead frontage and floorspace. Its occupation is a sign that things are improving here to.

Commercial Yields

4.22 A further objective comparison of retail performance is provided by an assessment of investment yields. In brief terms, yield is a measure of property value. It is a ratio of rental income to capital value and is expressed in terms of the open market rent of a property as a percentage of the capital value. In this way, the higher the yield, the lower the rental income is valued and vice versa. A higher yield is an indication of concern by investors that rental income might grow less rapidly and be less secure than a property with a lower yield. Set out below is a table of yields taken from the Property Market Report prepared by the Valuation Office and dated July 2008.

Table 11: Shopping Centre Yields 2001-08

Town	1/4/01	1/10/01	1/4/02	1/10/02	1/4/03	1/1/04	1/7/04	1/1/05	1/7/05	1/1/06	1/7/06	1/1/07	1/7/07	1/1/08	1/7/08
Alldershot	8	8	8	8	8	8	8	7	7	7	7	7	7	7	7
Basingstoke	7	7	6.5	6.5	6.5	6.5	6.5	5.5	5.5	5.5	5	5	5	5	5
Bracknell	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	7.25	7.25	6	6	6	6	6
Camberley	6.5	6.5	6.5	6.25	6.25	6.25	6.25	6.25	6.25	6.25	6.25	6.25	6	6	6
Farnborough	8	8	8	8	8	8	8	7.5	7.5	7.5	7	7	7	7	7
Guildford	5	5	4.75	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.25	4.25	4.25
Woking	6.5	6.5	6.5	6.25	6.25	6.25	6.25	6.25	6.25	6.25	6.25	6.25	6	6	6
Wokingham	8.5	8.5	8.5	8.5	8.5	8.5	8.5	8.25	7.75	6.75	6.75	5.5	5.5	5.5	5.5

Source: Valuation Office Property Market Report July 2008

4.23 After 2008, yields began to rise across the country as a result of the recession and thus became as much a reflection of the wider economy as of local circumstances. Furthermore, with less property changing hands there is much less data to analyse, indeed, the Valuation Office has not published yield data since July 2008.

4.24 In Camberley there are very few recent deals to analyse. In the town centre the House of Fraser store was sold to Prupim for a net initial yield of 8.75% but a department store cannot be representative of the town generally due to the limited number of potential occupiers.

4.25 In view of all these factors, yield data should be treated with caution. The conclusions which can be drawn from it are that Camberley had a relatively low yield which was falling until the recession. This suggests that investors in more stable times consider the town to be a good opportunity.

The Length of Time Key Sites Have Remained Undeveloped

4.26 The key site in Camberley was the Atrium site which was completed in 2008. Beyond this there are no obviously undeveloped sites, although there is clearly potential for both intensification of existing uses and further development in locations like London Road.

Pedestrian Flows

4.27 The last survey of pedestrian flows in Camberley pre-dates the opening of the Atrium (PMRS Survey 2006 – included in our Retail Study of 2007) and is therefore now too dated to be useful. However, our own observations suggest that the area of the Mall shopping centre in the vicinity of Sainsbury's remains the strongest point of footfall during the week.

4.28 Park Street, with its pedestrianised environment and major draw in the Atrium, is busier in the evenings but at other times is less vibrant. No doubt the continuing vacancy of the Atrium retail space is responsible for this although there are signs that this situation is improving with the introduction of new retailers since the time of our last survey in April 2010 – notably H&M, United Colours of Benetton, Lidl and Cargo. Furthermore, such is the environmental quality of this area, we are confident of its long term health once further units are let.

4.29 The High Street is doing better than expected and at the time of our visit on a week day afternoon, it was busy along the majority of its length with footfall just tapering off at each end. This is a vast improvement on our previous survey.

Accessibility

4.30 Camberley is well placed within the local and regional road network, adjacent to the A30 and just a few kilometres from Junction 4 of the M3. This means that although several competing retail centres are within 30 minutes drive of the town, there is also a substantial resident population within the drive time area. With two multi-storey car parks, the town is well provisioned in terms of vehicle parking which will encourage visitors to the centre from far afield.

4.31 Camberley is well served by local buses, particularly since the new bus stop facility was completed on Charles Street, with daily services running between the town centre and numerous neighbouring centres such as Aldershot, Bracknell, Guildford and Woking. The railway station is also situated close to the town centre, linking Camberley with both local settlements and London into Waterloo Station.

4.32 As far as it contributes to the health, vitality and viability of the town centre, it is considered that Camberley's relatively high level of accessibility, by a number of means of transport, has a positive effect on the centre.

Town Centre Environmental Quality

4.33 Camberley's environmental quality is generally good, though with wide variations. Park Street and the recently built Atrium provide a shopping and leisure environment of a high standard. The Mall shopping centre is now beginning to show its age a little but remains a pleasant shopping environment. The High Street has benefitted from past traffic measures including one-way flow and traffic calming, though the northern end of this street is now suffering from a few long term vacancies and a consequent lack of investment and care. Similarly, London Road is not an area which has benefitted from major investment and the ongoing maintenance which results from this. The poor quality building stock located there, combined with a busy main road, create Camberley's poorest area of environmental quality. Overall though, it is considered that Camberley has a pleasant environment within which to shop and spend time and consequently it makes a positive contribution to the health and vitality of the town centre.

Conclusion

4.34 It is clear that Camberley remains a vital, viable shopping destination which benefits from the presence of key retailers in Sainsbury's, House of Fraser, Primark and BhS, together with a range of other High Street names. The Atrium has added a major leisure offer including a multi-screen cinema and bowling complex which has created a new leisure hub around which restaurants and bars have now clustered.

4.35 Although Camberley did not escape the recession completely unscathed, there are signs that the downward trend in health and vitality, reported within the Retail Study Update, has reversed and according to some indicators the town centre is matching or possibly even exceeding the pre-recession level. The number and variety of multiple national fashion retailers that have entered the town within the last 18 months is testament to this. Fashion retailing underpins any truly successful large town centre and a recovery in this sector has greatly aided the town's vitality and viability. In terms of vacancies to, Camberley town centre has improved of late and the demand from retailers, for space within the centre remains.

4.36 The Atrium clearly brought a shift in focus, particularly in the leisure sector, and we were concerned about the effect of this might have upon High Street. In reality, the leisure offer at the southern end of this street has remained in situ and the number of vacancies elsewhere has fallen.

4.37 There are some areas within the centre that would benefit from investment such as the northern quarter of the High Street and the frontage along London Road and this provides an a major redevelopment opportunity within the Area Action Plan. In general though the environmental quality of Camberley is good and the health, vitality and viability of the centre should be celebrated given the current state of the economy and the difficult trading conditions which persist.

5. Designation of Primary & Secondary Frontages

5.1 The Surrey Heath Local Plan 2000 defined the Primary Shopping Area of Camberley town centre and within it identified the primary and secondary shopping areas at that time.

5.2 The Surrey Heath Core Strategy and Development Management DPD now redefines the *Primary Shopping Area* of Camberley town centre based on the definition contained in annex B of PPS4 - namely:

> *"Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). "*

5.3 In accordance with the advice contained in **Policy EC3.1(c)** of PPS4, Chase & Partners now been requested to provide advice on the possible redefinition of primary and secondary retail frontages with the town centre.

5.4 In doing so we have had regard to the definition of Primary and Secondary Frontages found in Annex B of PPS4 – namely as follows:

- **Primary Shopping Frontage** – likely to include a high proportion of retail uses.
- **Secondary Shopping Frontage** – provide greater opportunities for a diversity of uses.

5.5 Our latest survey of the town centre suggests that some amendments to existing frontages in Camberley Town Centre should now be considered. These reflect development that has taken place since the Local Plan was adopted (particularly The Atrium) as well as the concentration of existing retail and town centre uses, and the relationship between certain frontages and adjoining uses.

5.6 Our recommendations on the designation of primary and secondary frontages are shown in **Appendix 5.** In addition to identifying existing Primary and Secondary frontages, Chase & Partners have also identified on this plan certain 'transitional' frontages (all of which are currently secondary) that may, in due course, become primary frontages were the Council's development aspirations for specific development sites identified in the AAP were to be realised.

6. Conclusions

6.1 This report has provided an updated quantitative assessment of potential comparison floorspace need in Camberley town centre to inform the Camberley Town Centre AAP. It is based on the results of the Surrey Heath Retail Study Update but has been updated to take into account the latest expenditure growth projections; the end date has also been extended to 2028 to reflect the timescale of the AAP.

6.2 It demonstrates that there is potential need to accommodate an additional 19,220 sq metres gross/13,460 sq metres net of new comparison floorspace in the period to 2020, and a further 30,320 sq metres gross/21,220 sq metres net of new comparison floorspace in the period to the AAP end date of 2028. On the basis that this does not envisaged any expansion of the town centre's existing - relatively modest - market share, this would simply sustain Camberley's existing position in the local hierarchy and not lead to demonstrable harm to surrounding town centres nearby.

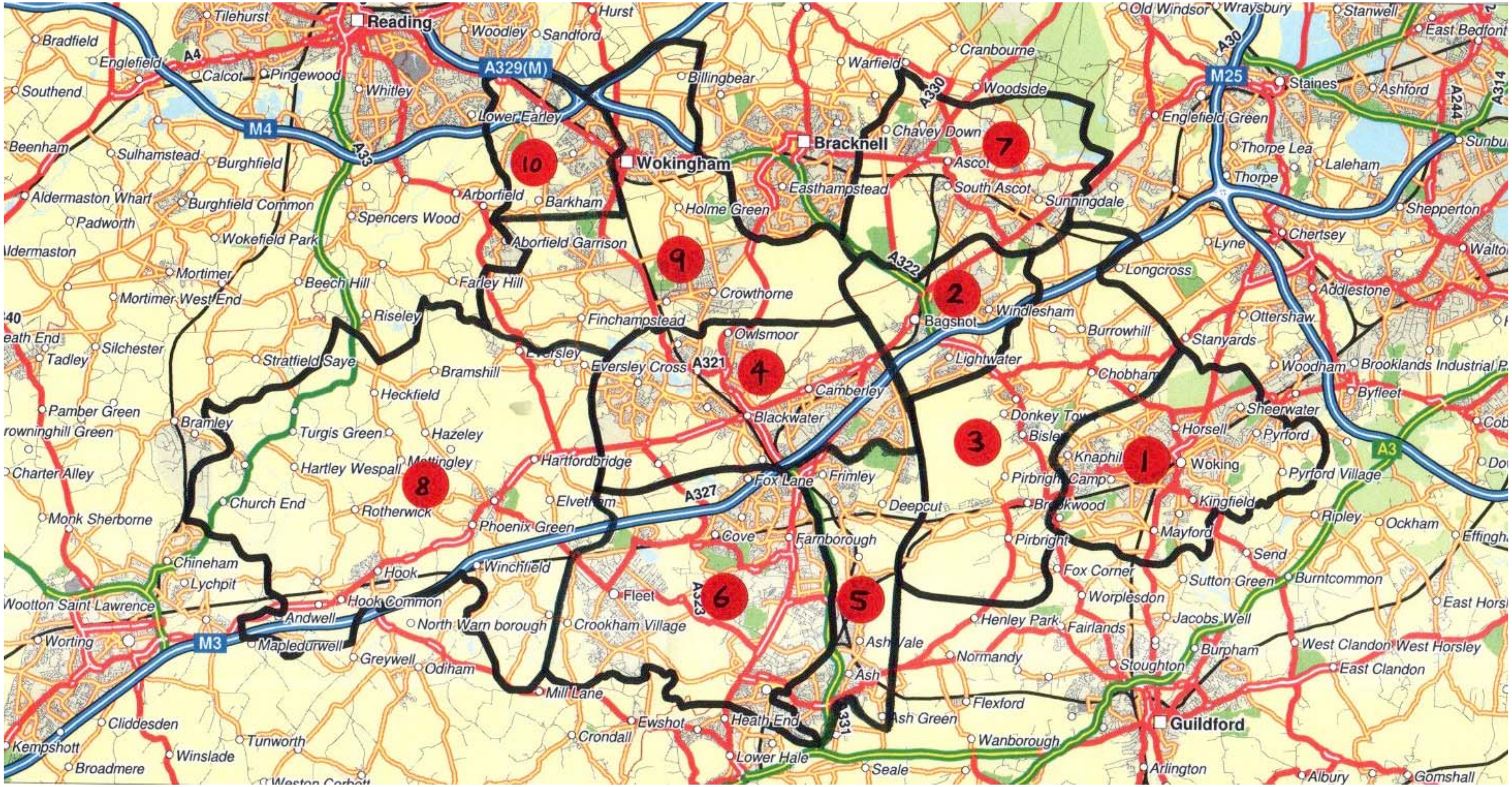
6.3 The Report also contains a revised and updated Town Centre 'Health Check'. This concludes that while Camberley has not entirely escaped the effects of the current economic downturn, it remains a vital, viable shopping destination. The completion of the Atrium development has added a major leisure offer and created a new leisure hub around which restaurants and bars have now clustered. There are some areas within the centre that would benefit from investment such as the northern quarter of the High Street and the frontage along London Road and this provides an a major redevelopment opportunity within the Area Action Plan.

6.4 Finally, in the light of this analysis we have also set out our recommendations on the definition of primary and secondary retail frontages in the town centre that the Council may wish to carry forward in the AAP.

Chase & Partners

January 2012

Study Area



Reading
Tilehurst
Bradfield
Englefield
Southend
Calcot
Pingewood
Whitley
Woodley
Sandford
Hurst
A329(M)
M4
A4
A33
Lower Earley
Beenham
Sulhamstead
Burghfield
Aldermaston Wharf
Burghfield Common
Padworth
Wokefield Park
Spencers Wood
Arborfield
Barkham
Aborfield Garrison
Wokingham
Billingbear
Holme Green
Warfield
Cranbourne
Woodside
A330
Bracknell
Chavey Down
Ascot
South Ascot
Easthampstead
Sunningdale
Old Windsor
Wraysbury
Stanwell
East Bedfont
Staines
Ashford
M25
A30
A244
A314
Englefield Green
Thorpe Lea
Thorpe
Laleham
Sunbury
Shepperton
Chertsey
Lyne
Longcross
Addlestone
Walton
Ottershaw
Aldermaston
Mortimer
Mortimer West End
Beech Hill
Farley Hill
Riseley
Finchampstead
Crowthorne
A322
Bagshot
Windlesham
Burrowhill
Stanyards
Woodham
Brooklands Industrial Park
Tadley
Silchester
Stratfield Saye
Bramshill
Eversley
Eversley Cross
A321
Owlsmoor
Camberley
Lightwater
Chobham
Byfleet
Pamber Green
Heckfield
Blackwater
Sheerwater
Pyrford
Horsell
Bramley
Turgis Green
Hazeley
Donkey Town
Bisley
Knaphill
Woking
Pyrford Village
Charter Alley
Hartley Wespall
Mattingley
Hartfordbridge
Fox Lane
Frimley
Pirbright Camp
Kingfield
Church End
Rotherwick
Elvetham
A327
Deepcut
Brookwood
Ripley
Ockham
Monk Sherborne
Phoenix Green
Cove
Farnborough
Pirbright
Mayford
Chineham
Lychpit
Hook
Winchfield
Fox Corner
Send
Sutton Green
Burntcommon
Wootton Saint Lawrence
Hook Common
Fleet
A323
Worplesdon
East Horsley
Andwell
North Warnborough
Crookham Village
Ash Vale
Henley Park
Fairlands
Jacobs Well
Worting
M3
Mapledurwell
Greywell
Odiham
Normandy
Burpham
West Clandon
West Horsley
Stoughton
East Clandon
Ash
Mill Lane
Flexford
Cliddesden
Ewshot
Heath End
Ash Green
A331
Guildford
Kempshott
Tunworth
Crondall
Wanborough
Winslade
Lower Hale
Broadmere
Seale
Arlington
Albury
Gomshall
Effingham
A3
1
2
3
4
5
6
7
8
9
10

Table 19: Camberley Town Centre Floorspace Statistics

	Gross Floorspace		Net Floorspace
	Sq Feet	Sq Metres	Sq metres
Convenience	39,700	3,688	2,213
Comparison	359,300	33,380	23,366
Service	133,700	12,421	8,695
Vacant	93,100	8,649	6,054

Source: Goad Centre Reports and Chase & Partners Street Surveys

Table 20: Projected Floorspace Requirements 2010-2026 (constant market share)

	Turnover 2010	Floorspace sq metres	Turnover:sq m	Turnover 2015	Turnover absorbed by increased efficiency in existing floorspace	Projected increase based on constant market shares	Floorspace Requirement 2010-2015
Camberley	**£278,930,746**	33,380	£8,356	**£335,882,714**	£14,228,271	£42,723,697	**5,113**
mkt share	14.2%			14.2%			

Turnover 2020	Turnover absorbed by increased efficiency in existing floorspace	Projected increase based on constant market shares	Floorspace Requirement 2015-2020
£419,865,851	£14,264,555	£69,718,582	**8,343**
14.2%			

Turnover 2026	Turnover absorbed by increased efficiency in existing floorspace	Projected increase based on constant market shares	Floorspace Requirement 2020-2026
£546,182,444	£0	£126,316,593	**15,116**
14.2%			

Turnover 2028	Turnover absorbed by increased efficiency in existing floorspace	Projected increase based on constant market shares	Floorspace Requirement 2026-2028
£597,205,141	£0	£51,022,697	**6,106**
14.2%			

Total Floorspace Requirement 2010-2026	**sq m**	**34,679**
	sq ft	**373,277**

Camberley

Chase and Partners
20/12/2011

95 metres

CHASE & PARTNERS C&P

MULTIPLE RETAILER REPRESENTATION – CAMBERLEY TOWN CENTRE:

CATEGORIES	A1 OPERATORS	
Department Stores	BHS	House of Fraser
Variety Stores	Wilkinson	Argos
	Bags Etc	Hawkin's Bazaar
	Past Times	Poundland
	MacDonalds Gifts	The Entertainer
Fashion & Accessories	Moss	Clare's Accessories
	Accessorize	Blue Inc
	Westone	New Look
	Monsoon	La Senza
	Primark	Topshop & Topman
	River Island	H&M
	Esprit	Next
	United Colours of Benetton	Laura Ashley
Footwear & Repairs	Shoe Zone	Clarks
	Barratts	Shoon
Childrenswear & Accessories	Mothercare	Early Learning Centre
Jewellers, Watchmakers & Engravers	F Hinds	Ernest Jones
	H Samuel	
TV, Electrical, Radio & Records, Telephone	Bang & Olufsen	Game
	HMV	Carphone Warehouse
	Jessops	Sevenoaks Sound & Vision
	3 Store	O2
	Sony Centre	Panasonic
	Currys	Phones 4 U

	Vodafone	Orange
Pharmaceutical; Health and Beauty	Boots Superdrug	The Body Shop The Perfume Shop
Opticians	Specsavers Vision Express	Boots Optician
Books, Art, Stationery, Cards, Printing & Photo	WHSmith Clinton Cards Waterstones Birthdays	Post Office Ryman Card Factory
Furniture, Furnishings, Carpet Outlets, DIY & Household	Bensons for Beds YMCA Furniture Robert Dyas Moben	Dreams Linens direct British Heart Foundation Furniture Cargo Homewares
Sports, Camping & Outdoor	Blacks Allsports	J D Sports JJB Sports
Travel Agencies	Thomas Cook	
Charity Shops	British Heart foundation YMCA x 2 Phyllis Tuckwell Hospice	Cancer Research UK Sue Ryder
Miscellaneous	Supercuts Tony & Guy Holland & Barrett	Halfords Thornton's Coop Undertakers
Foodstores, Off-Licences & CNT	Premier Majestic Wines	Sainsbury's Lidl

A2 OPERATORS		**A3 OPERATORS**	
Barclays	Santander x 2	McDonalds	Que Pasa
HSBC	A-Plan Insurance	Costa Coffee	Burger King

Martin's & Co Estate Agents	Betfred	KFC	Zizzi
Abbey	Cheltenham & Gloucester	Starbucks	Frankie & Benny's
Nationwide	Chancellor Estate Agent	Chiquito	Pizza Express
Halifax	Swinton Insurance Office	Belle Italia	Nando's
Lloyds	Reed Employment Agency	Estilo Tapas	Wagamama
Ladbrokes	Natwest	Prezzo	Café Nero
Euro Exchange			
A4 OPERATORS		**A5 OPERATORS**	
Wetherspoon	Yates	Subway	

Camberley

Chase and Partners
12/1/2012

95 metres