

**SURREY HEATH RETAIL STUDY UPDATE
EXECUTIVE SUMMARY**

JUNE 2010

PREPARED AT THE OFFICES OF

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Executive Summary

1. Chase & Partners have been instructed by Surrey Heath Borough Council to undertake an assessment of future retail requirements for the Borough covering the development plan period up to 2026. The study assesses the retail health of Camberley, Bagshot, Frimley, Lightwater and Frimley Green, advising on an appropriate retail hierarchy, the need for further floorspace and measures to maintain and enhance the town centres.

Camberley

2. Camberley has recently seen the addition of a major new retail and leisure scheme (The Atrium) which is shifting the town's retailing "centre of gravity" toward Park Street and away from the High Street. Although most of the retail units on Park Street remain unlet, we are confident that demand for these will materialise as the economy recovers and Park Street will become a vibrant, highly attractive retailing area. The existing retail offer has not fully escaped the recession, with the important fashion offer diminishing since the last retail study was undertaken in 2006. Nevertheless, key anchor stores such as Sainsbury's, House of Fraser and Primark remain, along with a host of other strong brands and Camberley town centre remains vital and viable. The town centre has considerable potential for growth, should sufficient occupier demand be identified. The existing shopping centre makes inefficient use of the available land and redevelopment of this site – taking in the land to the north up to London Road – would allow for a significant expansion of the retail offer, including new anchors such as a department store or variety store.
3. In addition to this site, there is the potential for further development at Knoll Road, provided the existing uses there can be relocated and traffic issues can be resolved. Retail development in this location could potentially assist in preserving the vitality of High Street.
4. Although Camberley is both vital and viable it is experiencing significant change, the implications of which must be managed. The future of High Street depends upon preventing the important uses there relocating to the new heart of the town centre at Park Street. The current dislocation of the two sides of the town centre - which occurs after the shopping centre closes in the evening - must be addressed, either by keeping access through the shopping centre open or by improving other links.

District and Local Centres

5. The town centre of **Frimley** clearly meets the PPS4 definition of a district centre. The town centre is anchored by a Waitrose foodstore and provides a range of other services. Vacancies are rare and the town is fulfilling its role in the local retail hierarchy. There is very limited potential for growth and the town centre appears to have reached its level.
6. The major weakness in the town centre is its reliance upon a single foodstore as a generator of footfall. The loss of this store would undermine the centre's well being and pose a threat to its future. Surrey Heath Borough Council should therefore prioritise the protection and enhancement of this store in future policy.
7. **Bagshot** appears to be suffering from a lack of vibrancy which in our view is due to the low intensity uses now occupying space in the town centre. There are few generators of significant footfall aside from the Somerfield/Co-op store and like Frimley, the town centre's future well-being is inextricably linked to this store. Despite the good environmental quality the town centre is not as vital nor viable as it could be and Surrey Heath Borough Council should address this in future policy. Although mainstream comparison retailers are unlikely to seek space in Bagshot, others such as the coffee chains might and this could, potentially, create interest from which independent retailers could benefit. We therefore recommend a pragmatic and realistic approach to development control decisions in Bagshot where policy does not dogmatically defend use class A1 floorspace at the expense of potentially more beneficial A2 or A3 uses.
8. **Lightwater** is a clear local centre, focused on a small foodstore with a number of services clustered around it. The centre has few vacancies and appears to be functioning very well. The only anomaly is the location of the Post Office outside the town centre and the relocation of this to the town centre would be of mutual benefit. The centre fulfils a valuable role in the local community and it should be afforded the protection planning policy offers designated local centres.
9. **Frimley Green**, similarly to Lightwater, fulfils a valuable role in its local community and is deserving of local centre designation and the policy protection that comes with it. Although the uses are spread out, they do include the convenience retail and service uses PPS4 requires of local centres. Some limited expansion of this retail and service offer should be encouraged to stimulate the town's vitality and existing uses should be defended against changes of use or out of town competition.

Quantitative Need for Further Floorspace

10. As part of this study, Chase & Partners have undertaken an assessment of future floorspace needs for Camberley over the planned period. This expenditure modelling is based upon the results of a household survey of shopping patterns in Surrey Heath and the wider area, together with population and expenditure data supplied by Pitney Bowes MapInfo. The exercise examines quantitative need assuming constant market share, and 10% and 20% increases in market share. The floorspace requirements are summarised below:

Table 1: Floorspace Requirement for Camberley 2010-26 (assuming constant market share)

	2010-2015		2016-2020		2021-2026		Total	
	Net	Gross	Net	Gross	Net	Gross	Net	Gross
Sqm	4,538	6,483	8,373	11,961	14,218	20,311	27,129	38,756
Sq ft	48,847	69,781	90,126	128,752	153,041	218,626	292,014	417,166

Table 2: Floorspace Requirement for Camberley 2010-26 (assuming 10% increase in market share)

	2010-2015		2016-2020		2021-2026		Total	
	Net	Gross	Net	Gross	Net	Gross	Net	Gross
Sqm	8,163	11,661	9,365	13,379	15,640	22,343	33,168	47,383
Sq ft	87,866	125,523	100,804	144,006	168,348	240,497	357,017	499,362

Table 3: Floorspace Requirement for Camberley 2010-26 (assuming 20% increase in market share)

	2010-2015		2016-2020		2021-2026		Total	
	Net	Gross	Net	Gross	Net	Gross	Net	Gross
Sqm	11,788	16,840	10,356	14,794	17,062	24,374	39,207	56,010
Sq ft	126,885	181,264	111,471	159,241	183,654	262,359	422,021	602,887

11. Camberley is therefore in the rare position of possessing both a considerable need for further floorspace and sites with the potential to accommodate it or a large part of it in the town centre.

Recommendations

12. In terms of Surrey Heath Borough Council's future policy, we recommend the following:

Camberley

- Designation as "Primary Town Centre";
- Identification of potential development sites at Knoll Road and the existing shopping centre (taking in land to the north up to London Road) and production of planning briefs for these sites;
- Action to prevent the dislocation of High Street from The Atrium and Park Street;
- Protection of existing uses on High Street but realism in the defence of A1 floorspace, with priority given to uses which generate interest and activity;
- Make the provision of a high quality shopping environment a policy objective in the interests of competing with other centres and with online retailing;
- Protection of the core retail area from a change of use away from A1 – with flexibility if the proposed use would generate significant interest and footfall.

Bagshot

- Retain district centre designation;
- Be realistic in development control policies, recognising that A1 floorspace is not always the best generator of footfall and vitality;
- Support and protect the anchoring foodstore, encouraging its expansion and resist any proposal not in the town centre which might bring its viability into question.

Frimley

- Retain district centre designation;
- Encourage long term redevelopment of existing blocks with a view to improving the town centre's appearance;
- Prioritise improvement of the shopping environment including traffic calming measures and cosmetic improvements;

- Support and protect the anchoring foodstore, encourage its expansion and resist any proposal not in the town centre which might bring its viability into question.

Lightwater

- Designate as local centre;
- Apply policies which protect the town's existing role, particularly key services and the anchoring foodstore from out of town competition;
- Encourage relocation of the Post Office to the town centre;
- Support any suitable new proposals which are consistent with a local centre role.

Frimley Green

- Designate as local centre;
- Apply policies which protect the town's existing role particularly key services and the anchoring foodstore from out of town competition;
- Support any suitable new proposals which are consistent with a local centre's role.

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June 2010