# VOLUME C: TOWN CENTRE HEALTH CHECKS & LOCAL CENTRE AUDITS

# APPENDIX C:

# TOWN CENTRE HEALTH CHECKS & LOCAL CENTRE AUDITS

## 1. INTRODUCTION

1.1 This appendix provides the findings of qualitative assessments or health check assessments of the Borough's three main town centres: Chertsey, Addlestone and Egham. It includes a review of edge of centre and out of centre retail provision relating to each of the centres.

1.2 A high-level audit is also provided on the Borough's four Local Centres of Englefield Green, Ottershaw, New Haw/ Woodham, and Virginia Water.

### HEALTH CHECK METHODOLOGY

1.3 This appendix provides an overview of the relative health of the centres of Chertsey, Addlestone and Egham. It examines the centres' current vitality and viability based on the key performance indicators (KPIs) set out in the Planning Practice Guidance[1] (PPG). The PPG states that the following KPIs may be relevant in assessing the health of town centres and planning for their future:

- diversity of uses
- vacancy levels (ground floor)
- customers' experience and behaviour
- retailer representation and intentions to change representation
- commercial rents and yields
- pedestrian flows
- accessibility
- perception of safety and occurrence of crime
- town centre environmental quality
- balance between independent and multiple stores
- evidence of barriers to new businesses opening and existing
- businesses expanding evening and night time economy offer

1.4 The health check assessment was informed by published datasets sourced from a range of providers, including Local Data Company, Experian Goad, Datcha, as well as commercial market data from local property agents. A site visit was undertaken for each town centre to inform our overall assessment.

#### *Stakeholder Consultation*

1.5 A guided tour was carried out for Chertsey town centre with key members of the LSH and Council project team. A nominated town centre stakeholder representative was invited to accompany the tour. Representatives of Chertsey's business community and local Councillors attended the tour for their respective centres. The other two town centres were visited separately.

1.6 Where possible, LSH sought the views from stakeholders and those with knowledge of the town centres from a business perspective. Contact was established with Chertsey and Egham Chambers of Commerce and feedback was received from local agents on the local commercial property market. The feedback from stakeholders has informed commentary on commercial property indicators, barriers to business growth, and summary on each town's Strengths, Weaknesses, Opportunities, and Threats (SWOTs).

[1] Planning Practice Guidance (July 2019). Paragraph: 006 Reference ID: 2b-006-20190722

# 2. ADDLESTONE TOWN CENTRE

2.1 Addlestone is the largest of the Borough's three town centres based on the quantum of floorspace provision, which is mainly due to the presence of a Tesco Extra in the town centre. The town is the administrative centre for the Borough and where Runnymede Borough Council's offices and library are located.

2.2 In recent years, Addlestone has benefited from major regeneration through the development of the Addlestone One scheme. The scheme delivered 213 new residential units, 13,656 sqm of retail and restaurant/cafe floorspace anchored by a Little Waitrose, a Premier Inn hotel, and The Light Cinema.

2.3 The defined town centre is shown in the figure below and runs the length of Station Road including office development close to the junction with Woburn Hill and southwest to the junction of High Street and Brighton Road. The Primary Shopping Area broadly covers commercial areas that make up the southern half of the town centre including commercial floorspace along Station Road from the railway line and down to and including the Addlestone One development.

**Figure 2.1: Addlestone Town Centre Boundary & Primary Shopping Area**


2.4 Further investment is planned for the town centre through the planned development of Addlestone East. The scheme when developed will provide 75 flats homes and 384 sqm gross of flexible commercial space for retail and other town centre uses.

## Diversity of Uses

2.5 A total of 139 (133 not including offices) town centre units were recorded in Addlestone Town Centre in January 2022 of which 11 were vacant (i.e. not occupied). The majority of units are made up of retail (35 outlets which include both comparison and convenience retail), leisure (38), and service (44) uses. The table below shows how the mix of occupied units has changed since 2017. It shows that only comparison outlets have decreased in number since 2017, with convenience unchanged compared to 2017 and both leisure and service showing a modest increase in outlets. This results in an overall decline in occupied commercial outlets by only 3 outlets since 2017.

**Table 2.1: Diversity of Uses by Occupied Outlets**

| Classification | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | Change 2017-2022 |
|---|---|---|---|---|---|---|---|
| Comparison Retail | 30 | 32 | 28 | 28 | 25 | 24 | -6 |
| Convenience Retail | 11 | 11 | 11 | 11 | 14 | 11 | 0 |
| Leisure | 37 | 35 | 35 | 36 | 37 | 38 | +1 |
| Service | 42 | 45 | 44 | 49 | 46 | 44 | +2 |
| Total | 120 | 123 | 118 | 124 | 122 | 117 | -3 |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

### *Comparison Retail*

2.6 Comparison retail was the only classification of commercial uses in Addlestone that experienced an overall decline in the number of outlets. As highlighted in the main report, this reflects trends nationally where demand for physical stores has reduced as online shopping continues to grow. As a result, many high street brands are now consolidating their store portfolios by focusing store presence in stronger, larger shopping locations.

2.7 The table below outlines the mixture of different types of comparison retail outlets in Addlestone and how it has changed over a six-year period.

**Table 2.2: Comparison Goods Categories by Outlet in Egham (2017-2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Books, Arts & Crafts, Stationery, Printers | 2 | 2 | 1 | 1 | 1 | |
| Car & Motorbike Showrooms | 1 | 1 | 1 | 1 | 1 | 1 |
| Charity & Secondhand Shops | 6 | 7 | 5 | 5 | 4 | 4 |
| Chemists, Toiletries & Health | 3 | 4 | 4 | 4 | 4 | 4 |
| Department Stores & Mail Order | | | | | | |
| Discount & Surplus Stores | | | | | | |
| DIY, Hardware, Builder's Merchants & Household Goods | 1 | 1 | 1 | 1 | 1 | 1 |
| Electrical Goods & Home Entertainment | 9 | 9 | 10 | 10 | 9 | 8 |
| Fashion & General Clothing | 2 | 1 | | | | |
| Florists & Garden | | 1 | 1 | 1 | 1 | 1 |
| Furniture, Carpets, Textiles, Bathrooms & Kitchens | 3 | 2 | 1 | 1 | 1 | 2 |
| Gifts, China & Leather Goods | | | | | | |
| Jewellers, Clocks & Watches | | | | | | |
| Pet Shops & Pet Supplies | | | | | | |
| Sports, Toys, Cycle Shops & Hobbies | 3 | 4 | 4 | 4 | 3 | 3 |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

2.8 The table shows that the mix of comparison retail on offer in the centre is relatively restricted. Notably, the most recent data shows that the town centre is over-represented by certain categories such as charity shops (4 outlets) and electrical shops (8), with no representation from five retail categories. It is likely that the demand for unrepresented comparison goods categories is met by comparison offer at the Tesco Extra. It should be noted that the Tesco supports approximately 2,100 sqm gross[2] of comparison retail floorspace and will stock a very broad range of comparison goods – ranging from clothing and electrical goods, to pharmacy products and DIY and garden goods.

[2] Assumption that approximately 50% of the store's net sales floorspace (4,277 sqm) is used for the sale of comparison goods.

### *Convenience Retail*

2.9 Over the six-year period, the convenience retail offer has remained steady with no change in the number of outlets recorded. The 'Groceries, Supermarkets & Food Shops' category is the main representation of convenience retail offer, accounting for almost two-thirds of all convenience provision. Convenience offer is anchored by a Tesco Extra, which the household survey confirms is the key food shopping destination for residents in the Borough. A Little Waitrose in the Addlestone One development provides a second foodstore offer, albeit the household survey shows that the store is mainly serving a top up function. It is noted that the town centre does not have a limited assortment discounter, such as Lidl or Aldi which are typical for a town of this size and catchment reach. An Iceland store is located on Station Road, opposite Tesco. The town has limited offer in traditional convenience retailers. For example, there is only one bakery in the town centre and there are no butchers or fishmongers. This is likely to be influenced by the presence of Tesco Extra, which may limit competition for these types of traditional retailers.

**Table 2.3: Convenience Goods Categories by Outlet in Egham (2017-2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Bakers | 1 | 1 | 1 | 2 | 2 | 1 |
| Butchers & Fishmongers | | | | | | |
| Confectionery, Tobacco, Newsagents | 3 | 2 | 2 | 2 | 3 | 2 |
| Groceries, Supermarkets & Food Shops | 6 | 7 | 7 | 6 | 8 | 7 |
| Petrol Filling Stations | 1 | 1 | 1 | 1 | 1 | 1 |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

### *Service*

2.10 Addlestone has 38 service outlets, which has increased steadily over the past six years. The table below sets out the representation of service offer by the various different categories.

**Table 2.4: Service Categories by Outlet (2017 to 2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Auto & Accessories | | | | | | |
| Auto Services | 1 | 1 | 1 | 1 | 1 | 1 |
| Banks, Financial Services & Building Societies | 2 | 2 | 1 | 1 | 1 | 1 |
| Employment & Post Offices | 1 | 1 | 1 | 1 | 1 | 1 |
| Estate Agents & Auctioneers | 7 | 7 | 7 | 7 | 7 | 6 |
| Hairdressing, Health & Beauty | 19 | 23 | 24 | 29 | 26 | 26 |
| Household & Home | 1 | 1 | 1 | 1 | 1 | |
| Launderettes, Dry Cleaners & Other | 3 | 2 | 2 | 2 | 2 | 2 |
| Locksmiths, Clothing Alterations & Shoe Repairs | 1 | 1 | 1 | 1 | 1 | 1 |
| Pawnbroking & Cheque Cashing | | | | | | |
| Travel Agents & Tour Operators | | | | | | |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

2.11 Most notable is that 'Hairdressing, health and beauty' outlets represent the vast majority of the service offer, accounting for almost 70% of all service outlets. The number of outlets in this category has increased considerably over the past 6 years, with an additional 10 outlets opening between 2016 and 2019 before reducing to 26 outlets in 2022. Estate agents and auctioneers have the second highest representation of service categories with six outlets recorded in 2022. All the other service offers are predominately represented by one outlet. It is noted that the number of retail banks reduced from two outlets in 2018 to one in 2019, which reflects the trend of bank closures occurring in towns nationally.

The data demonstrates that while Addlestone is represented by most service categories, it is strongly weighted towards hair, health and beauty services.

### *Leisure*

2.12 There are 38 leisure outlets in Addlestone, an increase of one outlet since 2017, and both the entertainment and restaurants categories have increased by two outlets over the six-year period. The table below sets out representation in Addlestone by leisure category.

**Table 2.5: Leisure Categories by Outlet (2017 to 2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Accommodation | 1 | 1 | 1 | 1 | 1 | 1 |
| Bars, Pubs & Clubs | 2 | 2 | 2 | 2 | 2 | 2 |
| Cafes & Fast Food | 25 | 23 | 22 | 22 | 22 | 22 |
| Entertainment | 2 | 2 | 4 | 4 | 4 | 4 |
| Restaurants | 7 | 7 | 6 | 7 | 8 | 9 |
| Total | 37 | 35 | 35 | 36 | 37 | 38 |

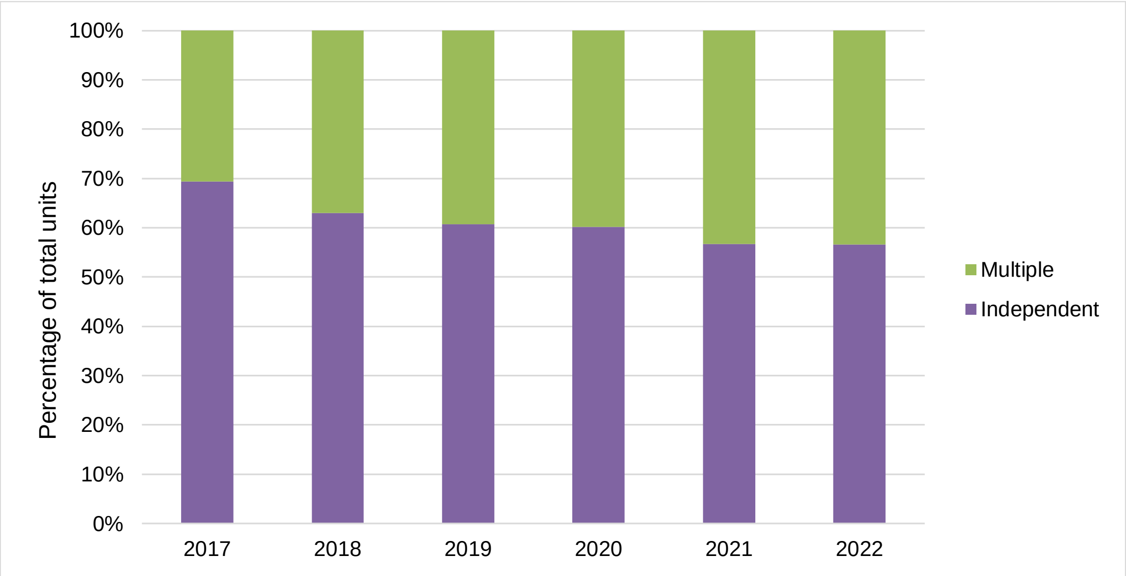
Source: Local Data Company, Surveys undertaken between 2017 and January 2022

2.13 As the table above shows, leisure offer in Addlestone is dominated by cafes and fast food outlets, which account for more than half of all service outlets. When combined with ‘bars, pubs & clubs’ and ‘restaurants’ total food and beverage outlets account for 87% of all service outlets. The town’s remaining leisure offer comprises the Premier Inn hotel and four outlets recorded as entertainment venues, which includes the cinema and three betting offices.

## Retailer Representation, Demand and Requirements

2.14 The independent business type in Addlestone accounts for just over half of the retail outlets (56.6%) which total 69 outlets. There is then less emphasis on independent businesses compared to the other town centres. The figure below illustrates the change of independent and multiple occupied units since 2017, which shows that the percentage of independent businesses has fallen substantially by 12.8% since 2017.

**Figure 2.2: Mix of Independents and Multiples in Addlestone (2017-2022)**




Source: Local Data Company, Surveys undertaken between 2017 and January 2022

2.15 National multiples, in Addlestone as of January 2022, totalled 53 outlets or 43.4% of all retail, service and leisure offer. As the table below shows, representation by national multiples is relatively strong for retail, particularly convenience retail, while representation by comparison multiples is mainly within the charity shop and health and pharmacy related categories. There is a notably high number of leisure multiples in the town centre, which apart from The Light Cinema is mainly represented by fast food brands.

**Table 2.6: Retail Multiple Representation in Addlestone**

| Convenience | Comparison | Service | Leisure |
|---|---|---|---|
| Greggs | Oxfam | Nationwide | The Light |
| Premier Express | Queen Elizabeth's Foundation | Hodders | Premier Inn |
| Subway | Age UK | Timpson | Harris + Hoole |
| Iceland | Princess Alice Hospice | | Costa |
| Tesco Extra | Lloyds Pharmacy | | Esquires Coffee |
| | Savers | | Wimpy |
| Waitrose & Partners | Specsavers | | Dominic's Pizza |
| Holland & Barrett | Vision Express | | KFC |
| | Boots Hearing Care | | Pizza Hut Delivery |
| | | | Papa John's |
| | | | Domino's |
| | | | Nandos |

2.16 As of April 2022, a review of published operator requirements identified only two recorded requirements from retail and leisure operators since January 2021, seeking a combined floorspace of up to 2,415sqm. This includes a requirement from Lidl who are seeking a store size of up to 2,415 sqm gross. German Donor Kebab (GDK), which is a national hot food takeaway franchise is also seeking representation in the town centre (up to 232 sqm unit)..

**Table 2.7: Retail and Leisure Requirements – April 2022**

| Recorded Date | Operator | Type | Floorspace Requirements (sqm) | |
|---|---|---|---|---|
| | | | Minimum | Maximum |
| Mar-22 | GDK | Donor Kebabs and burger | 47 | 232 |
| Mar-22 | Lidl | Supermarket | 1,672 | 2,415 |
| **Total** | | | **1,719** | **2,647** |

Source: The Requirements List, April 2022.

2.17 The quality of retail offer in the town centre can be categorised into three different groups: mass market, premium, and value. The table below shows how the quality of retail offer has changed over a six-year period.

2.18 Like Egham, Addlestone's premium offering is thanks to the presence of a Waitrose, which opened in 2018. Otherwise, the town's retail offering is balanced towards mass-market brands such as Lloyds Pharmacy, Specsavers, Tesco, Holland & Barrett, etc. The figure below shows that mass-market offer has reduced slightly in recent years, while value retail offer, which is represented by Iceland and other value brands, has remained broadly stable over the past six years.

**Figure 2.3: Quality of Retail Offer in Addlestone Town Centre**

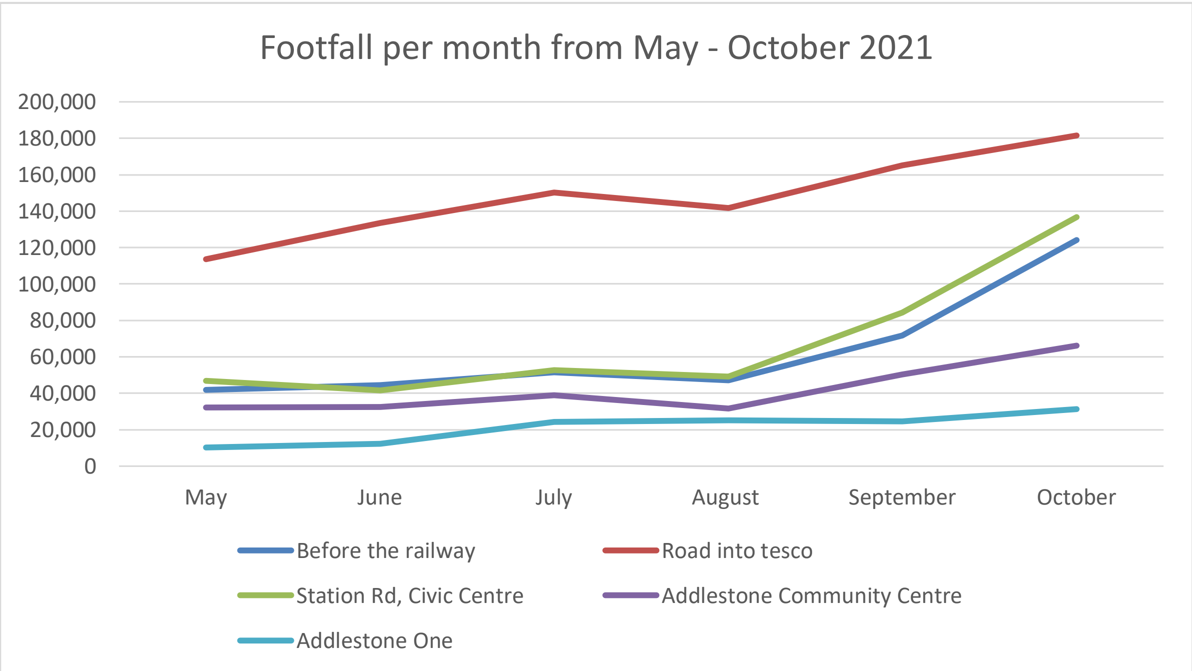

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

## Pedestrian Flows

2.19 Footfall data has been gathered from Datscha, who collect data from over 10 million mobile devices. This data is provided by Fetch Analytics who access 80+ sources including mobile apps, wifi hotspots and telecom providers (anonymised and GDPR compliant).

2.20 In total, five locations were monitored across the town centre, which were mostly located in and around the high street area. The figure below records the number of footfall counts across the five monitoring locations from May 2021 to October 2021.

**Figure 2.4: Footfall Counts in Addlestone between May – October 2021**

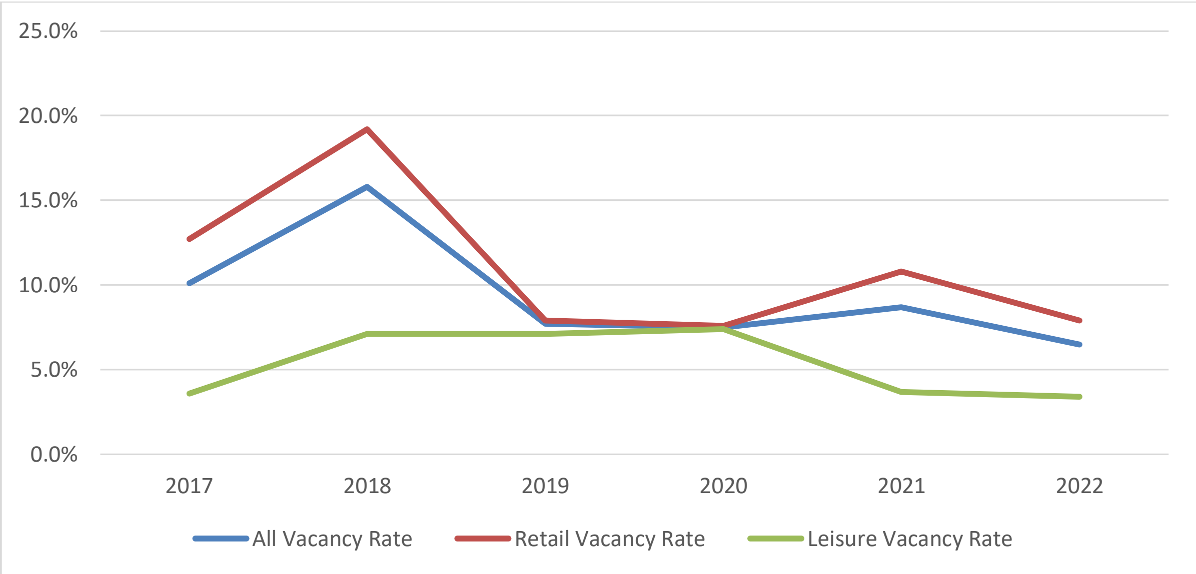



2.21 The graph shows that footfall is highest on the road, which leads into the Tesco Superstore. The latest data for October 2021 recorded 181,537 counts compared to 117,771 in October 2018; pre-pandemic. The rest of the locations had a similar level of footfall with similar trends, although the lower footfall count was in and around the new regeneration project at Addlestone One, possibly due to the current residential and retail vacancies.

## Vacancies

2.22 The LDC survey found 11 vacant units in Addlestone Town Centre in January 2022, which results in the lowest retail vacancy rate of the town centres considered in this report at 7.9%. This is lower that the GB vacancy rate of 14.3% identified by LDC. The vacancy rates in Addlestone in 2018 (over the six-year survey period) dropped off again in 2019, and have remained relatively stable since (see figure below). Leisure vacancies have improved slightly more than retail, with levels dropping to 3.4% in 2022. This may reflect greater efficiency in the sector to respond to challenging trading conditions from COVID-19, with the fast food market largely unaffected, particularly in relation to takeaways, which were able to trade during lockdown periods.

**Figure 2.5: Vacancy rate for retail and leisure units in Addlestone between 2017 and January 2022**




Source: Local Data Company, Surveys undertaken between 2017 and January 2022

## Opening times and Evening Economy

2.23 Sixteen retailers were sampled in Addlestone to include convenience, comparison food & beverage (F&B) providers, amongst others. The majority of the samples were taken along Station Road.

2.24 The majority of comparison retailers open around 9am and close around 6pm during midweek days and Saturdays, with the majority of retailers also trading on Sundays. The town’s three foodstores have more varying opening hours. Tesco Extra is open between 6am and midnight on midweek days and Saturdays, while Iceland and Little Waitrose trade between 8am and 6pm and 8am to 9pm, respectively. The three foodstores trade within Sunday trading hours.

2.25 The F&B providers have similar trading hours relative to their category and target market. For example, the coffee shops are open in the morning but close in the afternoon, while restaurants are open from late lunch until evening time. The town’s fast food and takeaway outlets typically open from lunchtime until late evening.

**Table 2.8: Sample of Business Opening Hours in Addlestone**

| | Open | Close | Sunday | Type |
|---|---|---|---|---|
| Addlestone One | 7am | 10pm | 12pm-6pm | comparison |
| Bamboo flowers | 8am | 6pm | closed | comparison |
| Savers Health & Beauty | 9am | 6pm | 10am-4pm | comparison |
| Fudges Cycles Addlestone | 9pm | 6pm | 10am-4pm | comparison |
| Oxfam | 9pm | 5pm | closed | comparison |
| Addlestone Model Centre | 9:30pm | 5:30pm | 11am-2pm | comparison |
| Tesco extra | 6am | 12am | 11am-4:30pm | convenience |
| Iceland | 8am | 6pm | 10am-4pm | convenience |
| Waitrose | 8am | 9pm | 12pm-6pm | convenience |
| Mooboo Addlestone | 10:30am | 7pm | same | F&B |
| Terra brazil | 12pm | 11:30pm | same | F&B |
| Nandos | 11:30am | 9pm | same | F&B |
| The Marlin | 11:30am | 10pm | closed | F&B |
| Wimpy | 9am | 9pm | 10am-9pm | F&B |
| Costa | 8am | 4pm | Same | F&B |
| Esquires | 8am | 5pm | 9am-4pm | F&B |

## Barriers to Business

2.26 The economic climate is uncertain due to COVID-19 and Brexit. This uncertainty results in a more cautious market with many businesses putting expansion plans on hold and taking fewer risks. This coincides with the burden of business rates, which is a cause for real concern when they return once the government halts this assistance.

2.27 LSH were not able to obtain feedback from stakeholder consultees to obtain a local perspective on barriers to business. However, it is likely that common issues that impede business growth for town centres will apply for Addlestone, such as rising start up and operating costs, unfavourable rents, and also business rates. Addlestone has a number of vacant units in the Addlestone One scheme which offer modern commercial space, but it is likely that premiums attached to these units and their lease structures will limit the appeal and affordability to independents. For the rest of the town centre, available accommodation to support new businesses and business growth may not be suitable or unaffordable.

## Accessibility and Pedestrian Mobility

2.28 The town centre is located along Station Road and is very walkable, the distance from the station (east of the town centre) to Addlestone One (west of the town centre) being less than a ten-minute walk. Station road is a two-way road with no obvious signage relating to speed restrictions (so presumably 30mph) and has several pedestrian crossings along it. Some of the crossings are by way of traffic lighting systems while others are focused at speed ramps and metal barriers for pedestrian safety and tactile paving located at both.

2.29 There doesn't appear to be any narrow walkways, alleyways or desire lanes to consider with most key areas easily accessed along main pedestrian pathways. Addlestone One, which contains a mixture of retail and residential units, is pedestrian only and is accessed to the west of the town centre, perpendicular to Station Road.

2.30 Although a relatively busy road runs through the town centre, the pedestrian experience feels safe due to the pedestrian paving being wide and open. Throughout the centre, the pedestrian environment is wider than the road at parts and gives a feeling of a sense of place. Further consideration of pedestrian environment is considered later in the assessment ('Environmental Quality').

## Parking Provision

2.31 On street parking is reasonably restricted in the town centre with on-street spaces limited along Station Road, where Blue Badge parking spaces are also provided. However, the town is served by two large car parks located in the stretch of Station Road between High Street and Garfield Road,. They include:

- Addlestone One Multi-Storey Car Park - 300+ parking spaces – (Up to 30 mins free and long stay available)
- Tesco Customer Car Park - 450 spaces for Tesco customers only (maximum stay – 3 hours)

2.32 Parking is also available at Addlestone Train Station but is limited to only five car spaces.

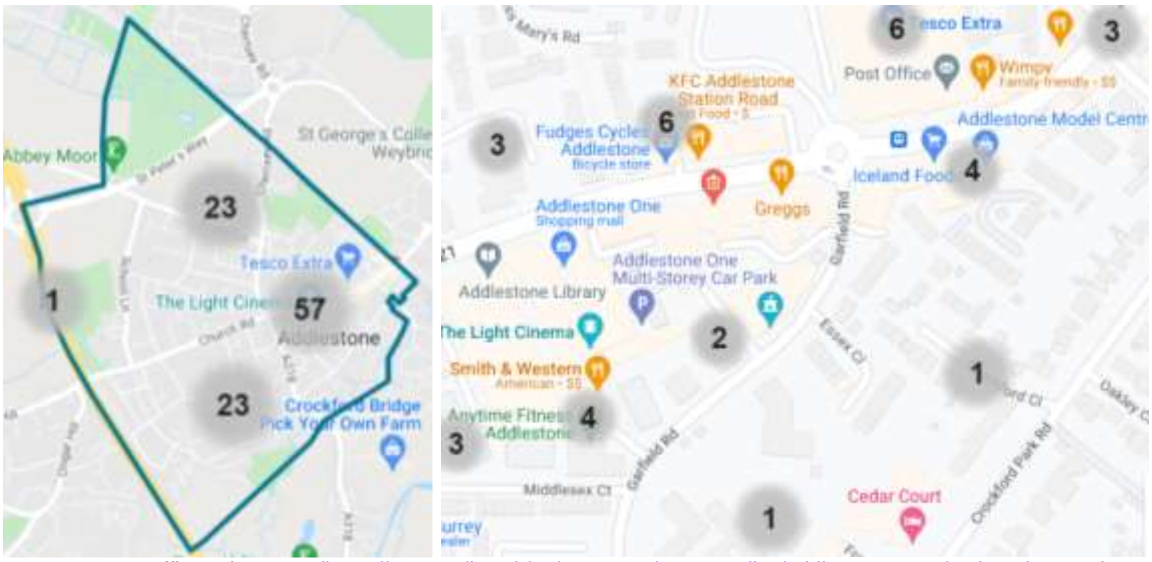
## Crime and Safety

2.33 Crime data recorded by Surrey Police found that in the month of February 2022, 104 crimes were reported across settlement area for Addlestone. The most common reported crimes were:

- Violence and sexual offences: 43
- Anti-social behaviour: 16
- Public Order: 6
- Criminal damage and arson: 5

2.34 The settlement boundary as defined by Surrey Police and the more local hotspots are identified in the images below and shows that the majority of crime is located in the town centre, on Station Road (57). The crime map for Station Road shows a comparatively even spread of crime figures.

**Figure 2.6: Hotspots for reported crime in Addlestone's wider settlement (left) and the town centre (right)**




Source: Home Office Crime Map ([https://www.police.uk/pu/your-area/surrey-police/addlestone-town/?tab=CrimeMap](https://www.police.uk/pu/your-area/surrey-police/addlestone-town/?tab=CrimeMap))

## Environmental Quality

2.35 The buildings within the town centre are mostly in good condition and in particular, the Addlestone One scheme is in very good condition, with new buildings and pedestrian paving that appears to be well maintained.

2.36 The environmental quality noticeably deteriorates farther away from this scheme, to the east. At the railway crossing, the buildings are tired, and some in poor condition. The paintwork, on what appears a relatively modern apartment block is fading, now darkened and dirty around the fenestration.  The paving also deteriorates closer to the station as it becomes more patchwork and uneven.

2.37 Hoarding installed around the Addlestone East site detracts from the streetscape on this section of Station Road. However, once developed, the scheme will have a very positive impact on the environmental quality of this area of Station Road and may encourage landowners and tenants in adjoining frontages to invest in their buildings.

2.38 There are benches and bins along Station Road and they are in reasonable condition, likely due to being made of stainless steel as opposed to wood.  Although the pedestrian paving is wide and very accessible in places, it appears to lack active frontages and would benefit from the introduction of pavement dining for existing food and beverage outlets.

2.39 There may be opportunity to introduce greenspaces into the town centre, albeit acknowledging that there is limited space to do so. However, there are greenspace solutions such as parklets that have been introduced into town centres where there is limited space. These can be used to break up areas of hard landscaping and there are many examples where on-street parking spaces are converted into a parklet. This could be explored on Station Road. A more radical approach to introducing greenspace would be to create a pocket park or public open space from an existing brownfield site.

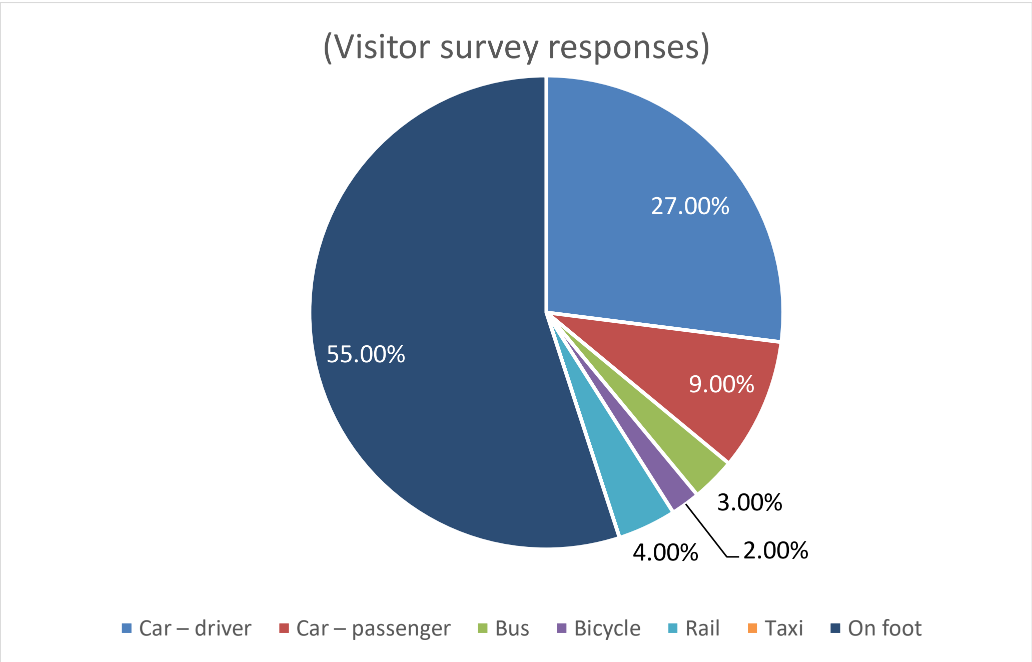
## Customer Perception of Addlestone Town Centre

2.40 The perception of the town centre from a customer viewpoint was obtained from the household telephone interview survey (HTIS), described in more detail in Section 5 of the main report, and also an in-centre shopper survey conducted in January 2022.  The surveys focused on what people like and dislike about Addlestone Town Centre and improvements which would likely encourage them to frequent the town more.  The full results of both surveys can be viewed in Volume C.

2.41 The following provides a summary of the key findings on the overall perception of Addlestone Town Centre based on all responses from the in-centre survey and total study area responses from the household survey.

2.42 **Preferred travel mode** – the majority of visitor survey respondents visited the town centre by foot (55%) and car travel (drivers) being the second most popular mode of travel (27%).

**Figure 2.7: How did you travel to Addlestone today?**



2.43 **Length of stay** – most people who visited Addlestone town centre did not intend to stay for more than an hour, which highlights the opportunity to increase dwell time.

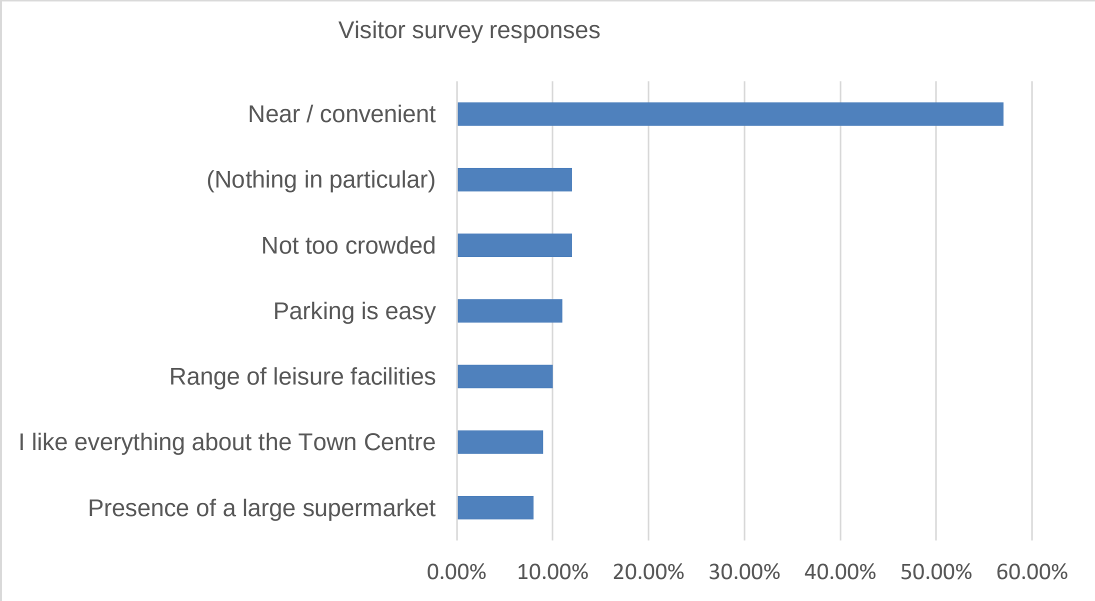
**Figure 2.8: How long do you intend to stay in Addlestone today?**

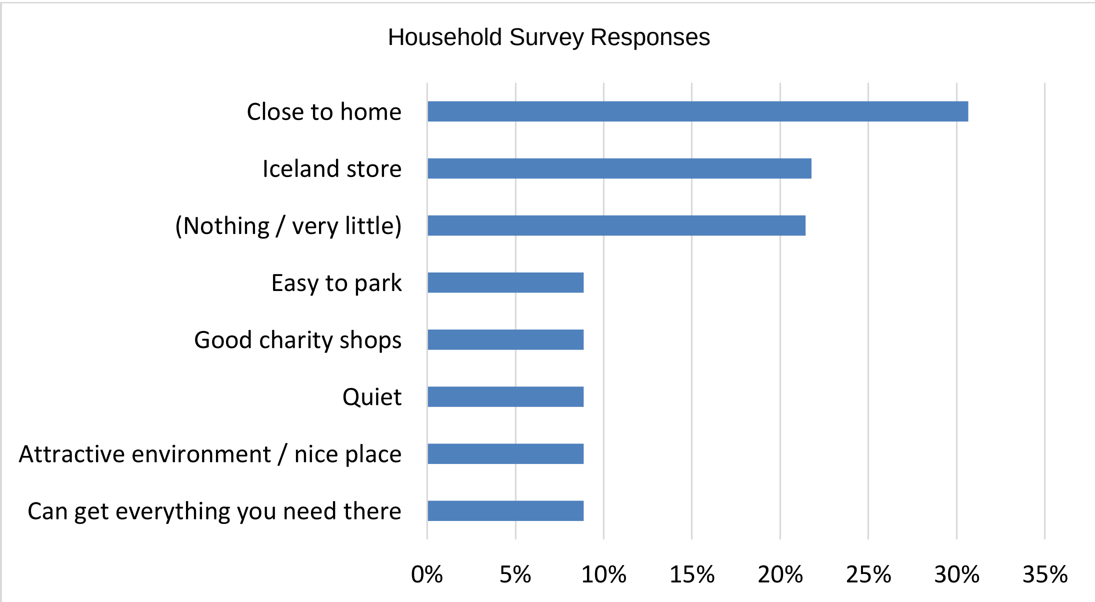

2.44 **Reason** for visit – the main reason respondents gave to why they are visiting Addlestone was more varied and evenly spread compared to other town centres. No specific response dominated the results with a mix of buying food and non-food items, for services, work, meeting people and eating out.

**Figure 2.9: What is your main reason for visiting Addlestone today?**


2.45 **What is liked most about Addlestone:** Respondents for 'In Centre' surveys overwhelming stated that they liked Addlestone because it is convenient. The remaining responses were very evenly spread, perhaps demonstrating no clear or obvious attractions of the town centre. Responses to the household survey were somewhat similar except that over 20% of respondents highlighted the Iceland store as the attribute they liked most about the town centre. While this is surprising given the presence of a large Tesco store, it may be indicative of the catchment profile, which relies on more affordable convenience goods, which Iceland offers.

**Figure 2.10: What do you like most about Addlestone Town Centre?**

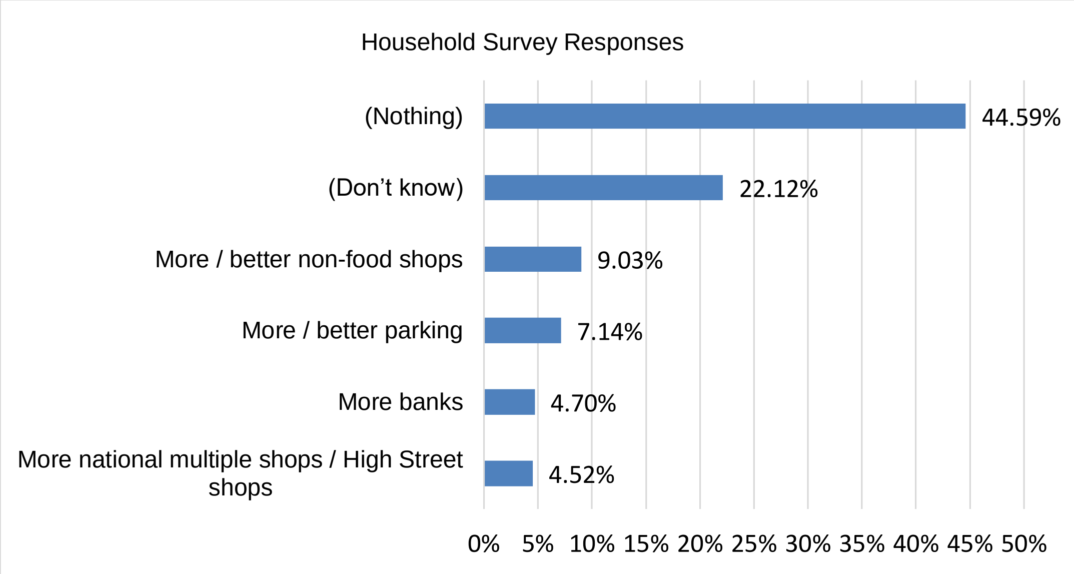



Note: Responses from respondents living in Zones 1

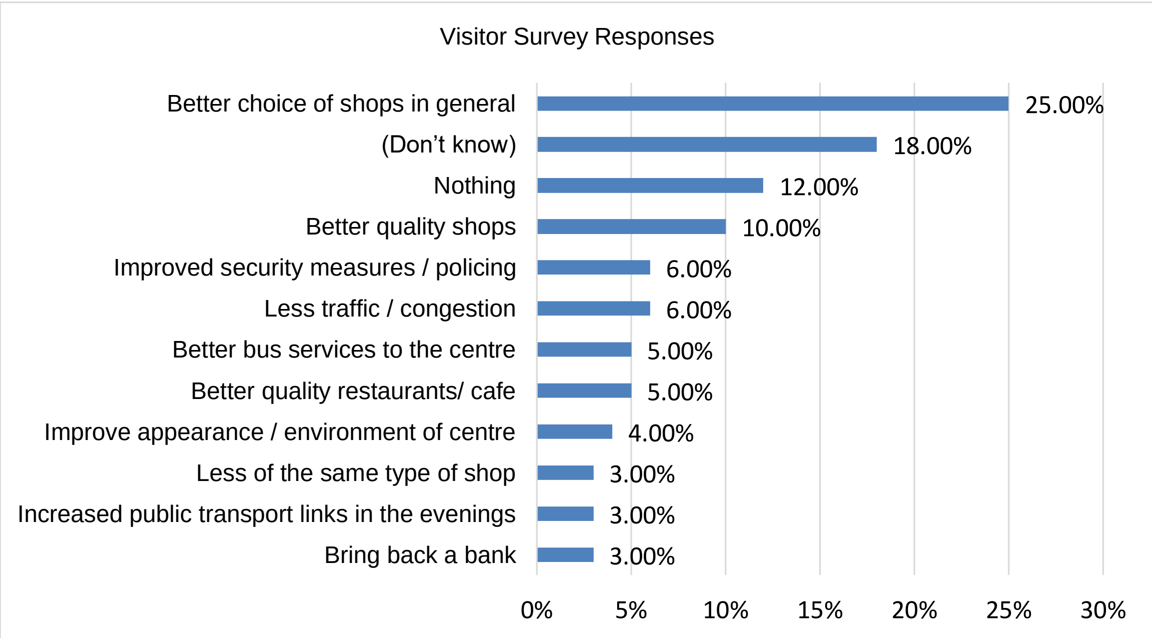
2.46 **What improvements are needed to encourage more trips**? Responses to the household survey and visitor survey differed in respect to what improvements need to be prioritised. Firstly, some 46% of respondents to the household survey stated that no improvements would encourage more visits to Addlestone, compared to 12% of visitor survey respondents. Respondents to the visitor survey overwhelmingly highlighted the need to improve the choice of retail offer generally, while improvements to the quality of shopping were also frequently highlighted. Respondents to the household survey were more specific and were more likely to highlight the need for more/ better non-food shops followed by better parking provision. -

**Figure 2.11: What improvements would encourage you to visit Addlestone more often?**



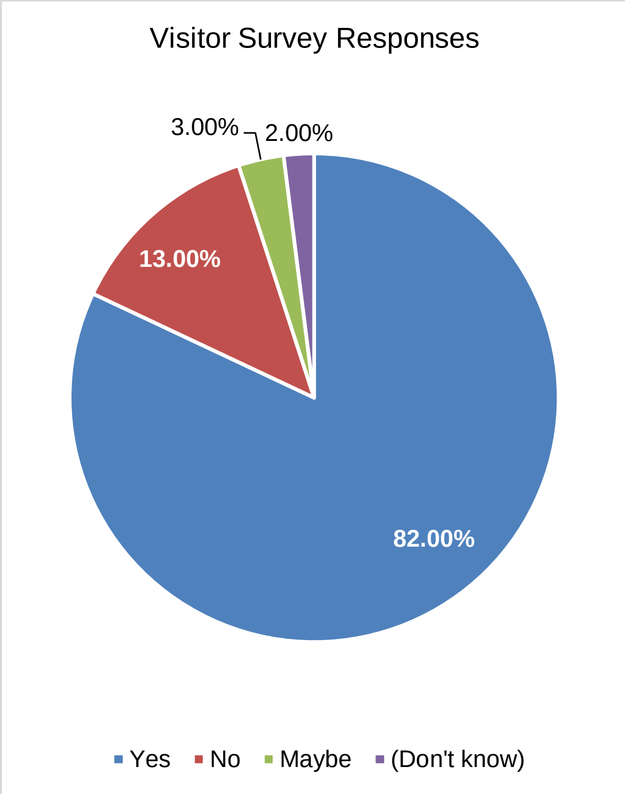

Note: Responses from respondents living in Zone 1 (Addlestone).

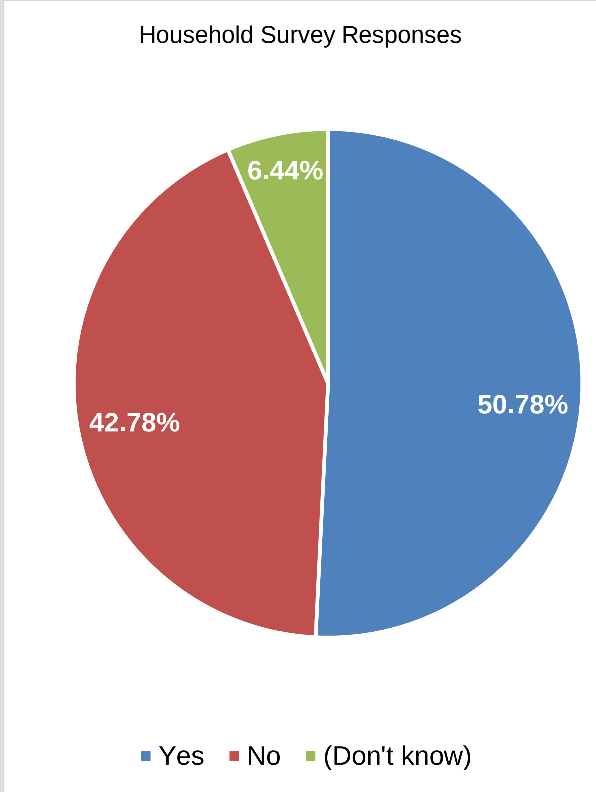
**Figure 2.12: What does Addlestone need to make it a better town centre for everyone?**




2.47 **Markets** – respondents to the household and visitor surveys were asked whether a regular street market would encourage respondents to visit the town centre more often. Respondents to both surveys overwhelmingly stated yes, with respondents to the visitor survey stating that they would like more food producers and a better range of stall holders within a new regular market. The responses from the two surveys clearly indicate strong support for a regular street market.

**Figure 2.13: Would the introduction of an improved and regular street market encourage you to visit Addlestone more often?**



## Summary

2.48 In summary, we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Addlestone Town Centre below:

| **Strengths** |
|---|
| Addlestone is the second largest town in the borough in terms of quantum of commercial floorspace and is also the administrative centre for the Council. |
| The Tesco Extra is a key anchor and located right in the middle of the town centre making it very accessible. |
| The large-scale regeneration scheme 'Addlestone One' contributes to an attractive and clean built environment that has helped to attract new anchor uses and brands to the town, including Waitrose, The Light Cinema, and Nandos. |
| The town is well connected with a railway station within the heart of the town centre and provides connections to London. The town is also well served by road access and is close to the M25. |
| The presence of Tesco Extra will draw many shoppers to the town centre and the household survey has found that the store's catchment reach extends across the Borough. |
| Addlestone has the lowest vacancy rate (under 8%) of the three town centres. |
| The town centre is walkable and is largely accommodating in terms of accessibility and mobility, with wide paving on parts of Station Road providing a safe and open pedestrian environment. |
| There is demand from the foodstore market with Lidl actively seeking a site in the town centre. |
| The town centre is new and therefore not as constrained in planning terms compared to the Borough's other two town centres (i.e. not located in a Conservation Area). |
| Investor interest in the town centre will be boosted by the development of the Addlestone East scheme. |

| **Weaknesses** |
|---|
| The town does not have much heritage or historical links and lacks the character and atmosphere found in the Borough's other two towns. |
| The town is overly saturated with Hairdressing, Health and Beauty services, which account for a significant proportion of total service uses. |
| A lot of the same category of comparison outlets (Electrical Goods & Home Entertainment). |
| The town centre is also over-represented by fast food outlets, which account for the majority of food and beverage outlets and are concentrated in one area of Station Road. This can lead to dead frontage during daytime hours and attract anti-social behaviour in the evening time. |
| The surveys found that there is currently a lack of dwell time in the town centre with most visitors visiting the town centre for an hour or less |
| The town centre's built environment deteriorates in condition and quality the further east, which means that visitors entering the town centre from the station do not have a strong 'sense of arrival'. |
| The comparison retail offering will likely never be as strong as the surrounding towns/cities and there has been a steady decrease in comparison retail outlets since 2017. |
| Whilst Tesco Extra is major generator of shoppers to the town centre, its one-stop-shop nature is unlikely to encourage linked trips with other town centre businesses. |
| Addlestone One appears to have several vacancies in both commercial and residential units, which raises questions on the viability of new commercial uses in the town centre. |
| The town lacks a good mix of convenience retail, including traditional convenience retailers, which is likely attributed to Tesco Extra dominating local convenience goods expenditure. The town would benefit from another supermarket, particularly a limited assortment discounter that would provide greater choice and affordability for residents. |

**Opportunities**

There may be opportunities to diversify the commercial offer of Addlestone One to encourage greater update in vacant commercial units. This could include supporting leisure uses within vacant units or pop up businesses to help generate more footfall during the daytime, which in turn will create the prospects of securing longer-term tenants.

The wide paving along Station Road means that cafes and restaurants could provide more outside dining / café culture, this would contribute to active frontages and add to the vibrancy of the high street.

Investment in public realm and building frontages will create a more attractive environment. This will require buy-in from freeholders and leaseholders to invest and maintain their property.

Creating more greenspace in the heart of the town centre will encourage more people to visit the town centre and promote linked trips to commercial facilities. This could come in the form of traditional soft landscaping or more innovative urban solutions such as pop up trees and 'parklets'. A more radical approach would be to create a green space or public open space from developed land, which could also be used for public events, such as a street market and seasonal events.

Market research found demand from respondents to the household and visitor survey for better retail offer in the town centre. Whilst opportunities to improve retail offer will be limited for Addlestone, there could be opportunities to promote independent retail, which is more likely to thrive, but subject to affordable rents and rates.

The household and visitor surveys also showed strong support for the introduction of a regular street market in the town centre, with 82% of visitor survey respondents stating that a new market would encourage more visits to the town centre.

Office to residential PDR conversions could result in an increase in the town's resident population and in turn the availability of retail and leisure expenditure. There is an opportunity for existing and new town centre businesses to attract this expenditure, but it will be dependent on meeting the needs and aspirations of new residents.

**Threats**

The town is competing with larger towns including those in the Borough, such as Egham, and in particular concerning comparison retail which is mainly limited to provision available in Tesco. This would draw people out of the town to look for better retail offering and potentially have a knock on effect for other retailing classes.

Market research found that town centre users and catchment residents are not satisfied with current retail provision and will continue to shop elsewhere for these goods. However, this also presents an opportunity to improve retail offer (see 'Opportunities').

Online shopping presents the biggest threat to the town centre and represents stronger competition than competing centres outside of the Borough for non-food goods in particular. At the same time, Addlestone will also be competing for retail and leisure custom with other centres, including Egham.

The introduction of use Class E could lead to the loss of the town's occupied retail and leisure units, which could have a significant impact on the town's ability to attract shoppers. This is some concern that certain personal service operators may proliferate street frontages (e.g. nail bars, tanning salons) which would affect the investment potential of the town centre, particularly the ability to attract better quality commercial operators.

PDR office to residential conversions are a threat to town centre day time trade, such as the recent conversion of Aviator Park to residential. Whilst new residential communities will bring expenditure this is unlikely to replace day time weekday trade that benefitted from officer worker expenditure. As such.

# 3. CHERTSEY TOWN CENTRE

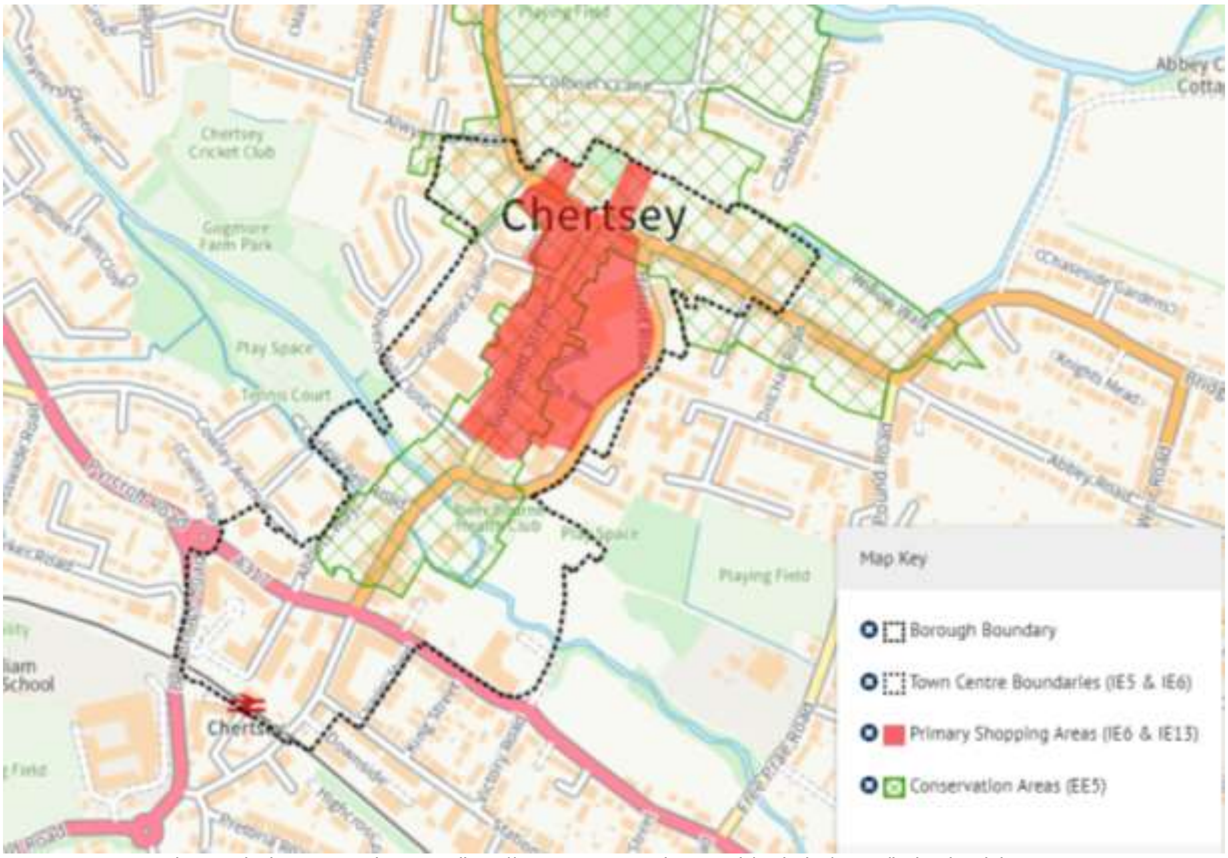
3.1 Chertsey is one of the three designated Town Centres as defined in Policy IE5 (Centre Hierarchy, sequential approach and impact assessment) of the adopted Runnymede 2030 Local Plan.

3.2 Of the Borough's three towns, Chertsey is the smallest and is located to the south of the Borough where it is situated between the M25, M3 and A3.

3.3 The town is a settlement that is steeped in history, as evident through its medieval and 18th Century architecture. As a result, the majority of the town centre is designated within a defined Conservation Area.

3.4 The figure below sets out the defined town centre boundary, as identified in the adopted Local Plan, along with the town's Primary Shopping Area (PSA).

**Figure 3.1: Chertsey Town Centre Boundary & Primary Shopping Area**




Source: Runnymede Local Plan Interactive Map (http://maps.runnymede.gov.uk/website/maps/index.html#)

3.5 The defined town centre comprises both commercial areas and residential streets; extending from the north of the town at London Street (B375) and southwards along Guildford Street to the railway station. The town centre boundary extends west to include residential and commercial areas off Gogmore Lane, Pycroft Road (A317), Curfew Bell Road and Abbots Lane.

3.6 The south end of the town centre along and south of Eastworth Road has evolved over the years to become an employment hub with a number of large office developments. The rail station is south of Eastworth Road and sits at the edge of the town centre boundary. This creates a distinct disconnect between the town centre. The main high street area is located further north along Guildford Street. The defined Primary Shopping Area (PSA) sits within the town centre boundary and includes core shopping streets, but also secondary shopping locations where retail is less prevalent.

3.7 Commercial activity is focused around the northern section of Guildford Street (north from the junction with Heriot Road). The shopping street is populated with a broad mix of commercial town centre uses, with two foodstores located either end. The largest is Sainsbury's which links to Guildford Street via the

Sainsbury's Centre. An Aldi foodstore opened in 2017 and is located off Gogmore Lane, but with pedestrian access via the store car park to Guildford Road (opposite the Royal Mail Delivery Office).

3.8 London Street serves a more secondary shopping location in the town centre and is situated perpendicular to Guildford Street. Commercial offer mainly comprises food and beverage, and service uses.

3.9 Looking south of Guildford Street from the junction of Heriot Road commercial uses become more fragmented. This is mainly due to physical constraints that break up the street's form, such as the river crossing and parkland, as well as developments that no longer support commercial uses. In this southern section of Guildford Street, the main commercial area comprises frontages between nos. 38 and 60, which mainly support food and beverage outlets. These uses are likely to generate daytime trade from office developments in the immediate area and along Pycroft Road. Some further food and beverage uses are located further south along Guildford Street (between Pycroft Road and the rail station) and will similarly serve the surrounding office worker market.

## Diversity of Uses

3.10 A total of 129 town centre units were recorded in Chertsey Town Centre in January 2022 of which 113 are in active use (i.e. occupied). The composition of occupied units is dominated by retail (36 outlets, including comparison and convenience retail) leisure (36), and service (36) uses. The table below shows how the mix of occupied units has changed since 2017. It shows that the number of occupied outlets has decreased in all categories, with decline greatest for service uses (13 outlets). Overall, the number of occupied commercial outlets has fallen by 25 outlets since 2017.

**Table 3.1: Diversity of Uses by Occupied Outlets**

| Classification | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | Change 2017-2022 |
|---|---|---|---|---|---|---|---|
| Comparison Retail | 30 | 26 | 27 | 25 | 26 | 25 | -5 |
| Convenience Retail | 10 | 10 | 11 | 11 | 11 | 11 | 1 |
| Leisure | 44 | 42 | 43 | 39 | 39 | 36 | -8 |
| Service | 49 | 42 | 41 | 38 | 41 | 36 | -13 |
| **Total** | 133 | 120 | 122 | 113 | 117 | 108 | -25 |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

### *Comparison Retail*

3.11 There has been a steady decline in comparison retail in the town centre over the past six years. This reflects trends occurring in most centres in the UK where demand for physical stores has declined as brands consolidate in stronger and larger shopping centres. Comparison retail offer is made up of a varying mix of retailers, with no one dominant category. Overall, the type and range of comparison retailers on offer is typical for a town of Chertsey's size and position in the hierarchy, but particularly influenced by the proximity of higher order centres where comparison retail offer will be stronger and where investment in high street brands will be focused.

3.12 The table below shows how the mix of comparison outlets has changed between 2017 and 2022.

**Table 3.2: Comparison Goods Categories by Outlet in Chertsey (2017-2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Books, Arts & Crafts, Stationery, Printers | 4 | 4 | 4 | 4 | 4 | 3 |
| Car & Motorbike Showrooms | 1 | 1 | 1 | 1 | 1 | 1 |
| Charity & Secondhand Shops | 5 | 5 | 5 | 5 | 6 | 4 |
| Chemists, Toiletries & Health | 1 | 1 | 2 | 2 | 2 | 1 |
| Department Stores & Mail Order | | 1 | 1 | 1 | 1 | 1 |
| Discount & Surplus Stores | 3 | 3 | 2 | 1 | 1 | 1 |
| DIY, Hardware, Builder's Merchants & Household Goods | 1 | 1 | 1 | 1 | 1 | 2 |
| Electrical Goods & Home Entertainment | 3 | 2 | 3 | 3 | 3 | 4 |
| Fashion & General Clothing | 3 | 2 | 2 | 2 | 2 | 2 |
| Florists & Garden | 1 | 1 | 1 | 1 | 1 | 1 |
| Furniture, Carpets, Textiles, Bathrooms & Kitchens | 3 | 2 | 1 | 1 | 1 | 2 |
| Gifts, China & Leather Goods | 2 | 1 | 1 | 1 | 1 | 1 |
| Jewellers, Clocks & Watches | - | - | - | - | - | - |
| Pet Shops & Pet Supplies | 1 | 1 | 1 | 1 | 1 | 1 |
| Sports, Toys, Cycle Shops & Hobbies | 2 | 1 | 2 | 1 | 1 | 1 |
| Total | 30 | 26 | 27 | 25 | 26 | 25 |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

3.13 As the table shows, there has been a reduction in outlets for most comparison goods categories and for one category there is no representation at all (i.e. ‘jewellers, clocks & watches’). In the past year, there has been an increase in representation in a small number of categories. This is mainly within categories that represent bulky goods retail (DIY, electrical goods, furniture/carpets, etc.). This includes the opening of a new rug shop on Guildford Street.

3.14 The potential for further openings is likely to be focused on these niche comparison retail types as opposed to mainstream high street offer. The exception being some value comparison retail brands, which may seek to co-locate next to existing brands (e.g. discount non-food goods retailers similar to Poundstretcher).

### *Convenience Retail*

3.15 The convenience sector has performed better with the number of convenience goods retail outlets increasing marginally in the six-year period to January 2022. The town is anchored by two foodstores, Aldi and Sainsbury’s. The findings of the household survey and retail market share analysis show that these two foodstores are key generators of town centre retail turnover and are likely to support footfall for many town centre businesses through linked trips with grocery shopping.

3.16 The town centre has a small mix of other convenience retailers such as day-to-day grocers and food shops, CTN (confectionists/ tobacconists/ newsagents), and a bakery. The table below shows that convenience offer has remained largely unchanged since the opening of a new foodstore. It is noted that the town centre does not support a butchers or fishmongers. These convenience goods categories are generally available in centres of Chertsey’s size. It is noted that in 2017 a butcher was trading in the town centre but closed the following year. This may be linked to competition for butchery goods associated with the opening of a second foodstore in the town centre.

**Table 3.3: Convenience Goods Categories by Outlet in Chertsey (2017-2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Bakers | 1 | 1 | 1 | 1 | 1 | 1 |
| Butchers & Fishmongers | 1 | - | - | - | - | - |
| Confectionery, Tobacco, Newsagents | 2 | 3 | 3 | 3 | 3 | 3 |
| Groceries, Supermarkets & Food Shops | 5 | 5 | 6 | 6 | 6 | 6 |
| Petrol filling stations | 1 | 1 | 1 | 1 | 1 | 1 |
| Total | 10 | 10 | 11 | 11 | 11 | 11 |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

### *Service*

3.17 The town centre has 36 outlets occupied by service operators, which include a mix of personal and professional services. The table below shows the type of categories of service outlets trading in the town centre since 2017.

**Table 3.4: Service Categories by Outlet (2017 to 2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Auto & Accessories | 1 | 1 | 1 | 1 | 1 | 1 |
| Auto Services | - | - | - | - | - | - |
| Banks, Financial Services & Building Societies | 3 | 3 | 3 | 3 | 2 | - |
| Employment & Post Offices | 4 | 4 | 4 | 4 | 4 | 3 |
| Estate Agents & Auctioneers | 4 | 3 | 3 | 2 | 3 | 3 |
| Hairdressing, Health & Beauty | 3 | 26 | 26 | 25 | 28 | 26 |
| Household & Home | - | - | - | - | - | - |
| Miscellaneous | 4 | 3 | 2 | 2 | 2 | 2 |
| Pawnbroking & Cheque Cashing | 1 | 1 | 1 | - | - | - |
| Travel Agents & Tour Operators | 1 | - | - | - | - | - |
| Total | 22 | 42 | 41 | 38 | 41 | 36 |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

3.18 As the table shows, the town's service offer is mainly supported by hairdressing, health and beauty services. It is notable that there now is no representation in financial services, particularly retail banks, which followed a number of closures over the past four years.

### *Leisure*

3.19 The town centre has 36 outlets occupied by leisure operators, which follows a year on year decline in overall occupied leisure outlets since 2019. This likely relates to the impact of the pandemic on the leisure sector, which is still in recovery as lockdown measures have been removed. The table below shows that the town centre's leisure offer based on occupied outlets is mainly supported by food and beverage offer, such as bars, pubs, restaurants, cafes and fast food.

**Table 3.5: Leisure Categories by Outlet (2017 to 2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Accommodation | 2 | 2 | 2 | 2 | 2 | 2 |
| Bars, Pubs & Clubs | 6 | 6 | 6 | 6 | 6 | 6 |
| Cafes & Fast Food | 23 | 22 | 22 | 2 | 21 | 18 |
| Entertainment | 3 | 3 | 3 | 3 | 2 | 2 |
| Restaurants | 1 | 9 | 1 | 8 | 8 | 8 |
| Total | 35 | 42 | 34 | 21 | 39 | 36 |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

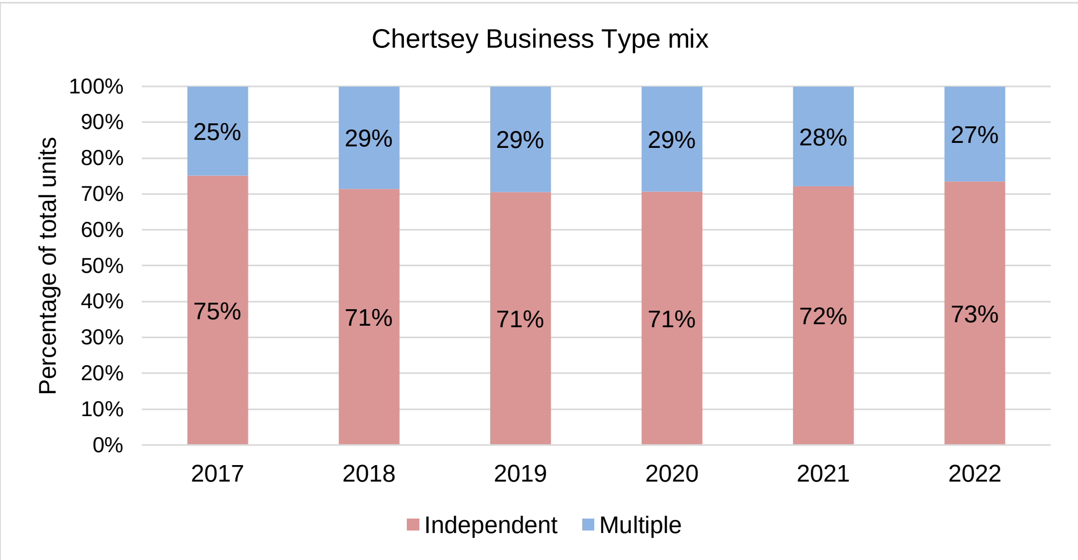
3.20 Aside from food and beverage offer, the town benefits from a sports centre, which based on the findings of the household survey is popular with residents in the surrounding catchment (market shares for leisure gym visits from Zone 2).

3.21 Other leisure offer includes the Chertsey Museum, also identified from the household survey as a popular cultural venue for residents in the Borough area.

## Retailer Representation, Demand & Requirements

3.22 Looking at independent offer first, the vast majority (57.8%) of retail outlets are non-multiples, which highlights the important role of independents in supporting shopping expenditure for the town centre. There are 83 independent retailers trading in Chertsey Town Centre, which accounts for 73% of all occupied retail units. The figure below shows how the balance of independents and multiples has changed over a six-year period to January 2022, which shows that representation from multiples has fallen in recent years.

**Figure 3.2: Mix of Independents and Multiples in Chertsey (2017-2022)**




Source: Local Data Company, Surveys undertaken between 2017 and January 2022

3.23 Chertsey has a relatively small representation of national multiples (30 outlets in January 2022), which is value led in respect to price point. Aldi and Sainsbury's serve as the town's key retail anchors. Comparison retail multiples are more limited, with the most popular high street retailers being Poundstretcher and an Argos Collect concession (in the Sainsbury's store). A list of all retail multiples recorded in the town centre is set out in the table below.

**Table 3.6: Retail Multiple Representation in Chertsey**

| Convenience | Comparison | |
|---|---|---|
| Aldi | Woking & Sam Beare Hospice | The Children's Trust |
| Holland & Barrett | The Pet Hut | Barnardo's |
| Londis | Poundstretcher | Queen Elizabeth's Foundation |
| Martin's | Argos Collect | Princess Alice Hospice Shop |
| One Stop | C. J. Smith | |
| Sainsbury's (Incl PFS | Pound Deals | |

3.24 The town centre has a very limited offer of leisure multiples, with provision mainly supported by food outlets such as Pizza Express, Costa, and Young's (public house). Other leisure multiples are present in the form of betting outlets (Coral x 2, and William Hill) and a hotel (Travelodge).

3.25 The centre has five service sector multiples, which are mainly represented by local and regional brands relating to estate agency and funeral care.

3.26 As of April 2022, a review of published operator requirements identified 7 recorded requirements from retail and leisure operators in the last 18 months and combined seeking up to approximately 8,919 sqm of town centre accommodation. Interest from the retail sector is largely from value retailers, such as Lidl, Savers, and The Range. We can confirm that Lidl are actively seeking a suitable site in Chertsey Town Centre. It is noted that M&S Food are seeking representation in the town centre.

3.27 The full list of recorded retail and leisure operator requirements is listed in the table below.

**Table 3.7: Retail and Leisure Requirements – April 2022**

| Recorded Date | Operator | Type | Floorspace Requirements (sqm) | |
|---|---|---|---|---|
| | | | Minimum | Maximum |
| Mar 2022 | Savers | Retailer | 186 | 325 |
| Mar 2022 | Lidl | Foodstore | 1,672 | 2,415 |
| Jan 2022 | McMullen | Pub & Brewery | 232 | 465 |
| Nov 2021 | The Range | Retailer | 1,394 | 2,787 |
| Oct 2021 | Windsor & Eton Brewery | Pub & Brewery | 139 | 465 |
| Sept 2021 | The Hilt House | Boutique Fitness Studio | 93 | 139 |
| Mar 2021 | M&S Food | Foodstore | 1,161 | 2,323 |
| **Total** | | | **4,877** | **8,919** |

Source: The Requirements List, April 2022.

3.28 Feedback from agents' report that demand for retail and leisure space in Chertsey is limited and where market interest does emerge it will mainly be supported by interest from independents.

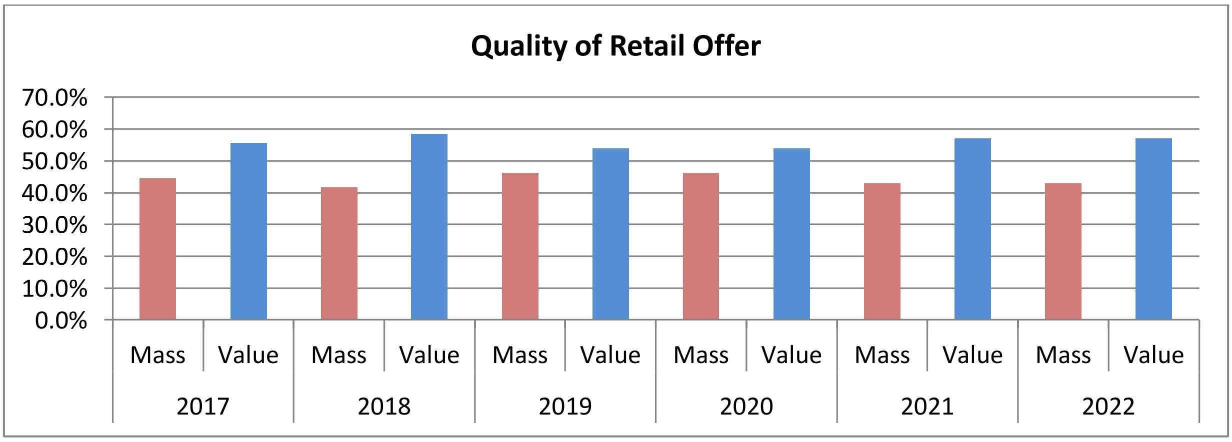
3.29 The quality of retail offer in the town centre can be categorised into three different groups: mass market, premium, and value.

3.30 No premium retail offer is identified in Chertsey Town Centre. Instead, the majority of the town's retail offer falls within the mass-market category and reflects brands and the types of retail that appeal to many.

3.31 As the Figure below shows, over a five-year period there has been a shift within the mass and value market categories, which has seen the proportion of mass-market retailers falling while value retail offer has increased.

3.32 These trends are indicative of demand for more affordable retail offer and reflect the type of retailers that have registered retailer requirements in the town centre (discussed above).

**Figure 3.3: Quality of Retail Offer in Chertsey Town Centre**

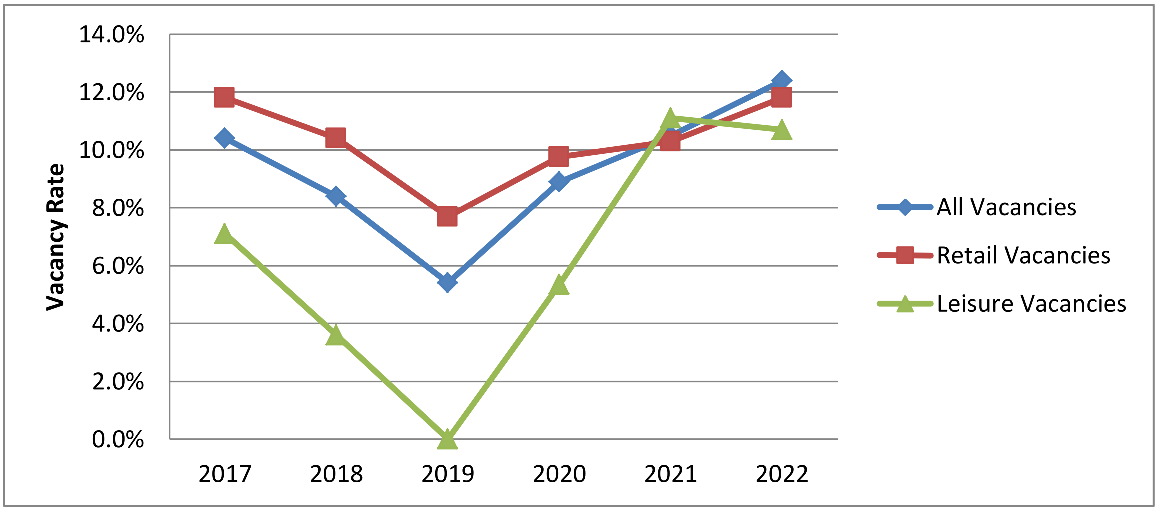



Source: Local Data Company, Surveys undertaken between 2017 and January 2022

## Vacancies

3.33 LDC identified 16 vacant units in Chertsey Town Centre in January 2022, which equates to a vacancy rate of 12.4%, which is below the GB vacancy rate of 14.3% identified by LDC. It is noted that the vacancy rate has steadily increased since 2019 where at that point vacancies were at their lowest in the town centre (following a year on year improvement from 2017). Although, at sector level there has been a small improvement in leisure vacancies over the year to January 2022.

**Figure 3.4: Vacancy rate for retail and leisure units in Chertsey between 2017 and January 2022**




Source: Local Data Company, Surveys undertaken between 2017 and January 2022

## Commercial Property Indicators

3.34 Information on prime rents and shop yields is not readily available for towns the size of Chertsey. This information was then gathered from local agents who have retail units available in Chertsey. It was found that in Chertsey, the retail rental market is not performing well.

3.35 The agent had one retail unit on their portfolio, located on Guildford Street, for 1.5 years, which had four enquiries. These enquires included a prominent kitchen manufacturing company who stated, subsequent to the viewing, that they did not like Guildford Street itself, and wouldn't be interested in progressing a tenancy. The property was eventually let to a start-up company at a rate 50% lower than previously let. The overall average retail rent was calculated at approximately £15 per sq ft.

3.36 Another retail unit had so little interest that a planning application was submitted for a change of use, removing walls and making it Sui Generis to attract additional interest. Only one potential occupier was found.

3.37 We understand that Starbucks has shown initial interest in a property in the town, but concluded that Chertsey was "too down market". The view from commercial agents is that there are too many shops in Chertsey, which add very little value to the town, and too many local traders, which limit the appeal to high street brands, which is not helped by the closure of retail banks. High business rates are also cited by agents as a major constraint in attracting tenants. Other concerns which were noted from potential tenants included parking times, which do not encourage people to stay in the town for long periods

3.38 Overall, there appears to be limited demand for retail units in Chertsey and, similar to offices, this has resulted in property owners considering changing commercial units to residential use to achieve better return on their investments.

## Opening Hours & Evening Economy

3.39 A mix of approximately twenty retailers was sampled to include convenience, comparison and food & beverage providers, amongst others. The majority of the samples were taken from the Guildford Street area.

3.40 This identified that the majority of comparison retailers open at around 9am and are closed by 6pm, being mostly closed on Sundays.

3.41 Convenience retailers open earlier and stay open later, closing from around 7pm to 10pm. Convenience retailers also open on Sundays, although usually closing earlier. Stores such as Aldi and Sainsbury's are included here, and would be considered key anchor stores for the area.

3.42 F&B retailers do not appear to have any similar opening schedules, opening and closing at different times, some closing on Sundays. This is a result of the various types of F&B providers, such as a café and a fast food outlet, the former type preferring to close on Sundays.

3.43 It is apparent that Chertsey's high street does not have a large night time economy in addition to many retailers also choosing to close over the weekend.

**Table 3.8: Sample of Business Opening Hours in Chertsey**

| | Open | Close | Sunday | Type |
|---|---|---|---|---|
| William Hill | 8:30am | 9:30pm | 10-8pm | betting |
| Honeycomb pharmacy | 9am | 6pm | closed | comparison |
| PhoneFix4U Chertsey | 9am | 6pm | closed | comparison |
| Melcom Electronics Ltd | 9am | 5:30pm | closed | comparison |
| house of flowers | 9am | 5pm | closed | comparison |
| Blue Mushroom | 9am | 5pm | closed | comparison |
| Barnardo's | 10am | 4pm | same | comparison |
| Londis | 6am | 9pm | same | convenience |
| Sainsbury | 7am | 9pm | 10am-4pm | convenience |
| Aldi | 8am | 10pm | 10am-4pm | convenience |
| Moldova news agents | 10am | 7pm | 11am-5pm | convenience |
| Sam's News | 6am | 7pm | 6am-1pm | convenience |
| Poundstretcher | 9am | 6pm | 10am-4pm | Discount |
| Revive Coffee Shop. | 10am | 3pm | closed | F&B |
| Flaming grill | 12pm | 10pm | 3pm-10pm | F&B |
| Carlo Delicatessen | 8am | 5pm | 10am-2pm | F&B |
| Tia Maria Cafe | 8am | 5pm | closed | F&B |
| Ohana Café Bistro | 9am | 4am | closed | F&B |
| Simpsons chicken | 11am | 11pm | same | F&B |
| Runnymede catering | 8am | 9:30pm | same | F&B |
| joes café | 6am | 2pm | 8am-1pm | F&B |

## Barriers to Business

3.44 Currently, the economic climate it uncertain due to COVID-19 and Brexit. This uncertainty results in a more cautious market with many businesses putting expansion plans on hold and taking fewer risks. This coincides with the burden of business rates, which is a cause for real concern when they return once the government halts this assistance.

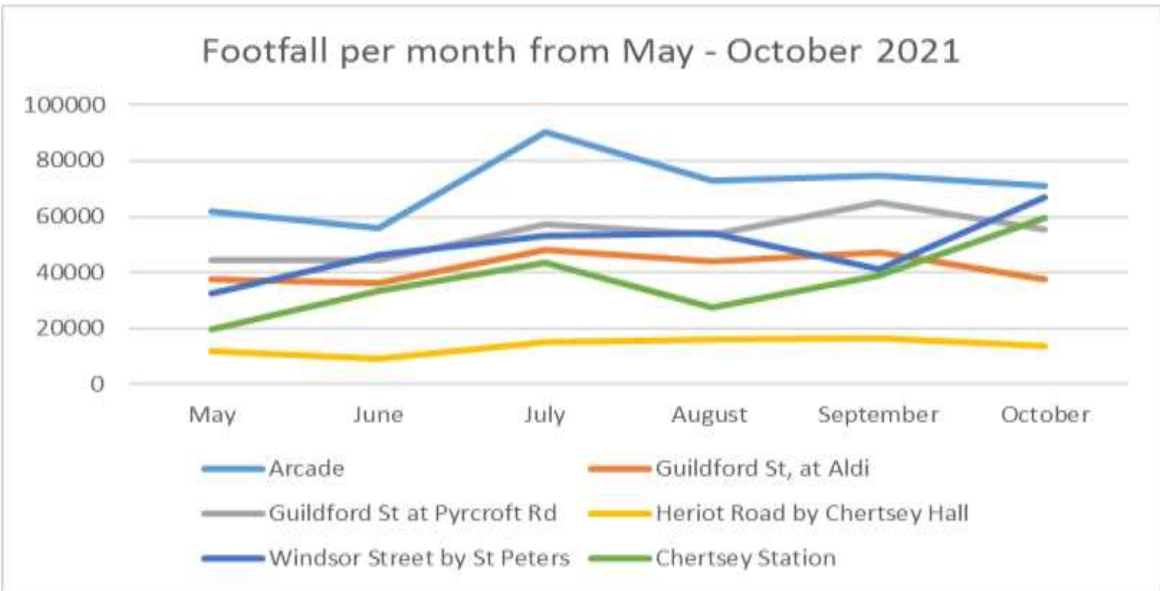
3.45 The retail market has been changing dramatically over the last decade and the recent challenges highlighted above have exacerbated this shift. The retail market in other places still thrives which implies that Chertsey currently is not attractive enough for new investors.

## Pedestrian Flows

3.46 Footfall data has been gathered from Datscha, who harvest data from over 10 million mobile devices. This data is provided by Fetch Analytics who access 80+ sources including mobile apps, wifi hotspots and telecom providers (anonymised and GDPR compliant).

3.47 Six locations were considered across the town centre, including on Windsor Street, the Sainsbury's Centre, Guildford Street (adjacent to Aldi car park), Heriot Road, junction of Pycroft Road and Guildford Street, and Chertsey Station. Figure 3.5 below sets out the footfall counts of these locations from May 2021 to October 2021.

**Figure 3.5: Footfall Counts in Chertsey between May – October 2021**




3.48 Looking at the individual count locations, the Sainsbury's Centre attracts the largest footfall count with 70,888 counts recorded in October 2021 This will reflect the location of the Sainsbury's store and public carpark, and indicates that the arcade is a busy and important link to the rest of the town centre. It is noted that the October 2021 reading is approximately 16% below pre-pandemic levels recorded in October 2018 (84,786).

3.49 Turning to other locations in the town centre, footfall counts were not as high further south on Guildford Street where there is pedestrian access to the Aldi car park. It is likely that counts will be lower here as Aldi customers have limited parking time and recorded counts may reflect customers who have travelled by foot or are using the foodstore and parking in other locations in the town centre.

3.50 Footfall count recordings are lowest at Heriot Road, which is expected as this secondary area where there is no commercial activity, with counts likely to be based on pedestrians travelling to and from the surface car park or visiting Chertsey Hall. It is noted that foot counts vary widely at Chertsey Station and this will reflect activity related to train arrivals and departure, and the time of day that foot counts were taken.

3.51 Datscha also identified that footfall is much higher in the town centre during weekdays, from which the highest recordings are during lunch hours. In contrast, footfall recordings at night time are negligible; supporting the findings of Chertsey is mainly supporting a daytime economy.

## Accessibility and Pedestrian Mobility

3.52 The town centre is walkable and can be traversed from north to south in approximately 10-15 minutes. However, pedestrian movement is disrupted by the A317 and the series of mini roundabouts, which results in a series of road crossings and detours that interfere with pedestrian flow.

3.53 The speed limit also appears to be 20mph in some areas along Guildford Street, which contributes to pedestrian safety and a more pleasant environment, yet other locations in the town centre are not posted at this speed and would benefit from a 20mph zone / limit.

3.54 Tactile paving and dropped kerbs were observed at most crossing points and a number of pedestrian crossing areas were noted along Guildford Street. However, it was noted that the north-south crossing of the A317 is difficult and indirect for pedestrians and cyclists and could be greatly improved.

3.55 Gogmore Lane is particularly narrow at parts (at Guildford Street and Windsor Street entrances) and the entrances would not be considered pedestrian friendly. There may be potential to use Gogmore Lane as a "desire line" to access Windsor Street.

3.56 Access to the library and the river is limited or inhibited by way of design and overall management, and wayfinding for cyclists using the river path is not clear, which could lead to conflict with pedestrians.

3.57 The town centre is well connected by public transport modes, albeit with more frequent services to local destinations. The train station at the southern edge of the town has connections to Weybridge, as well as London Waterloo via Staines and Hounslow. Local bus services are accessed from stops along the A317, Heriot Road and Windsor Street.

## Parking Provision

3.58 On-street parking is provided on Guildford Street and includes disabled parking provision. There are also a number of car parks within the town centre of Chertsey:

- Chertsey Beomonds (Heriot Road) - 55 spaces (maximum stay - 5 hours).
- Chertsey Gogmore Farm Park – 53 spaces. (maximum stay – 5 hours).
- Chertsey Library car park – 168 spaces. (maximum stay – 17 hours).
- Chertsey Sainsbury's Car Park – 182 spaces. (maximum stay - 2 hours, charges apply beyond 30 minutes and refunds available for Sainsbury's customers)
- Chertsey Station Car Park – 20 spaces (maximum stay unconfirmed).

3.59 Customer parking is also available at Travelodge and Aldi for customers only. On-street parking is also provided throughout the town including on Guildford Street and London Road.

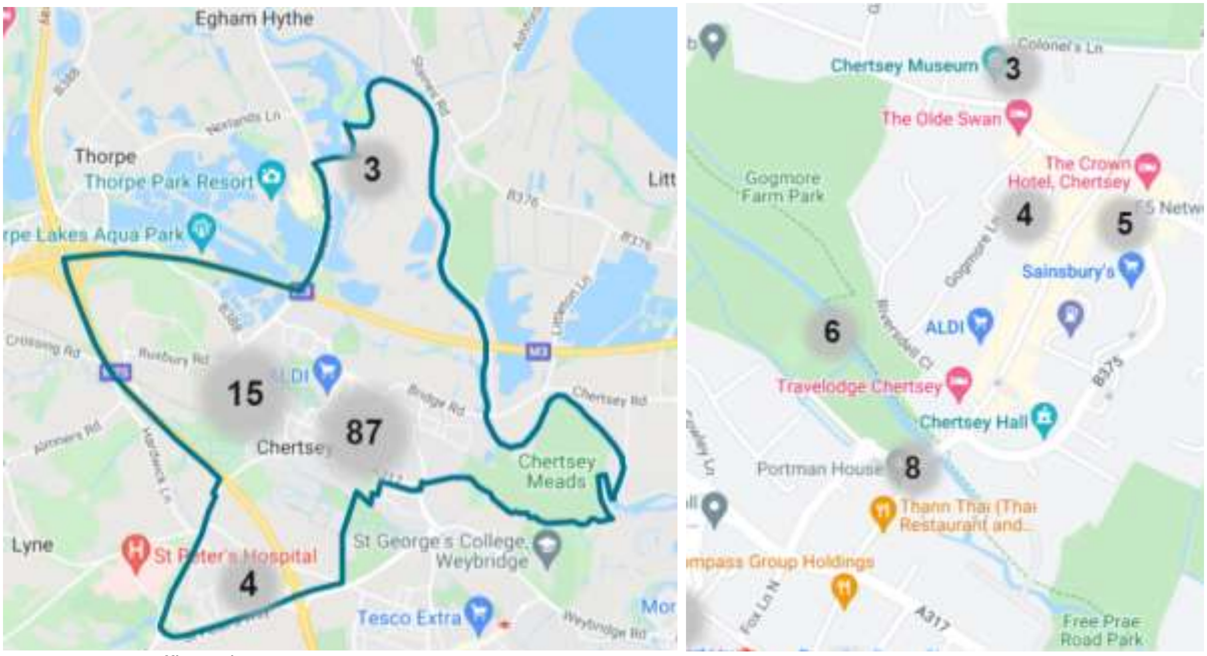
## Crime and Safety

3.60 Crime data recorded by Surrey Police found that in the month of February 2022, 109 crimes were reported across the settlement boundary for Chertsey as defined by Surrey Police and shown in the Figure below. The most common reported crimes were:

- Violence and sexual offences: 38
- Anti-social behaviour: 21
- Criminal damage and arson: 11
- Other theft: 10
- Vehicle crime: 9
- All other crime: 50

3.61 The majority of reports of crime are located in the town centre area, particularly around Guildford Street and Gogmore Park.

**Figure 3.6: Hotspots for reported crime in Chertsey's wider settlement (left) and town centre (right)**




Source: Home Office Crime Map

## Environmental Quality

3.62 A Conservation Area washes over the northern portion of the town centre, including northern Guildford Street and the Windsor and London Street area, as this area has a large amount of listed buildings, including the Grade II* listed Church of St Peter. Due to their listed status, the buildings have original sash windows and bring a heritage feel to the high street. However, the fenestration and paintwork on the buildings could be enhanced / repaired.

3.63 Some F&B providers have brought their dining out to streets, which adds to a pleasant al fresco-eating environment.

3.64 The public street furniture is not well located with only a few benches located towards the south side of Guildford Street where it was observed that some of the benches were damaged and the street paving started to lift up, presumably due to tree roots. Generally, however, the paving throughout the town centre is in relatively good condition and offers dropped curbs all along Guildford Street.

3.65 There are hard barriers along the southern end of Guildford Street, which are unsightly and take away from the environmental quality of the street scene. There are also bollards and hard barriers scattered throughout the town centre, presumably to prevent illegal parking.

3.66 Some cycling infrastructure is provided in terms of some road paintings and signage, but could be improved.

3.67 The high street also lacks greenery, has very little, if any, trees or hanging baskets, which results in a "hard" public realm experience, and would benefit from softening.

3.68 There are some heritage features, which were observed during the site visit, which could be improved/enhanced, such as the war memorial, old street signs, the water pump and even the old faded painting advertisements on several gable walls throughout Chertsey.

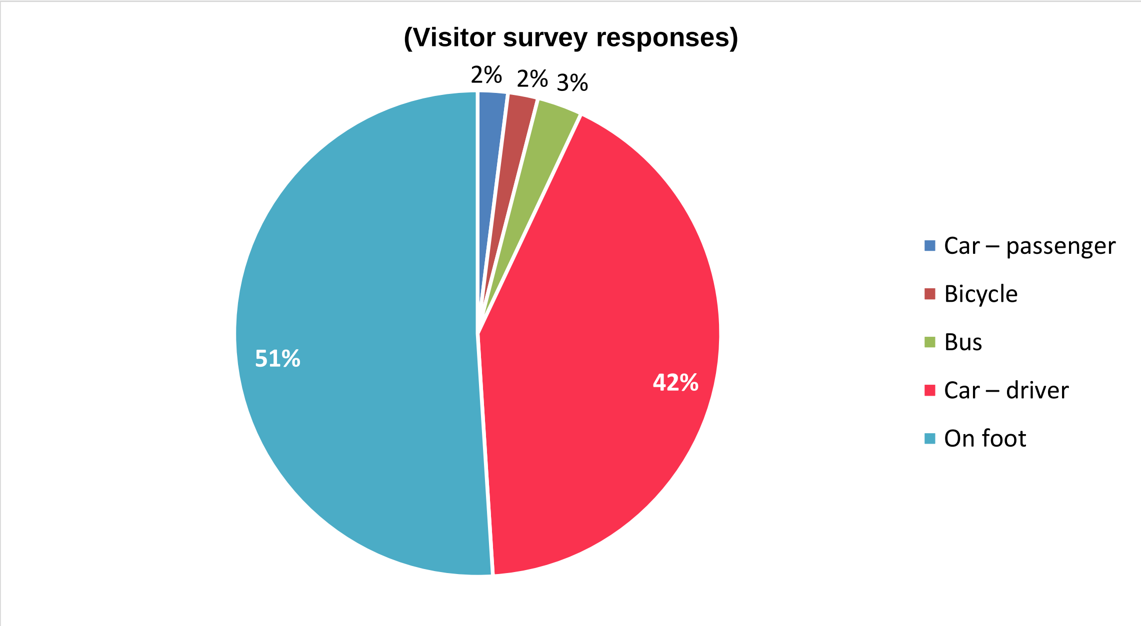
## Customer Perception of Chertsey Town Centre

3.69 The perception of the town centre from a customer viewpoint was obtained from the household telephone interview survey (HTIS), which is described in more detail in Section 5 of the main report, and an in-centre shopper survey conducted in December 2021. The two surveys provide a good indication of what people *"like"* and *"dislike"* about Chertsey Town Centre, and what improvements could persuade them to visit the town more frequently than they do at present. The full results of the survey are contained in Volume D.

3.70 The following provides a summary of the key findings on the overall perception of Chertsey Town Centre based on all responses from the in-centre survey and total study area responses from the household survey.

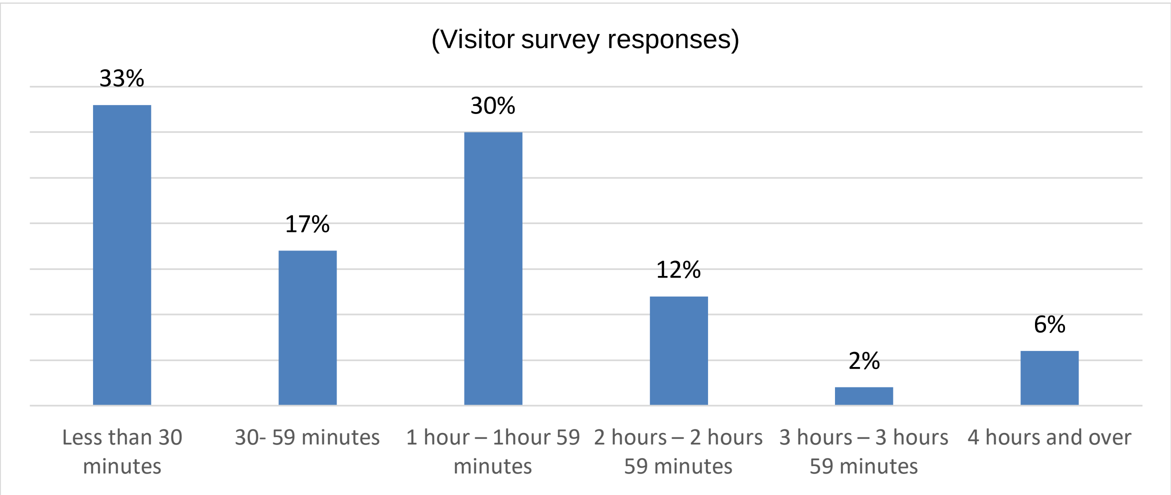
3.71 **Preferred travel mode** – the majority (51%) of visitor survey respondents to the town centre travelled there on foot with car travel being the second most popular mode of travel (42%).

**Figure 3.7: How did you travel to Chertsey today?**



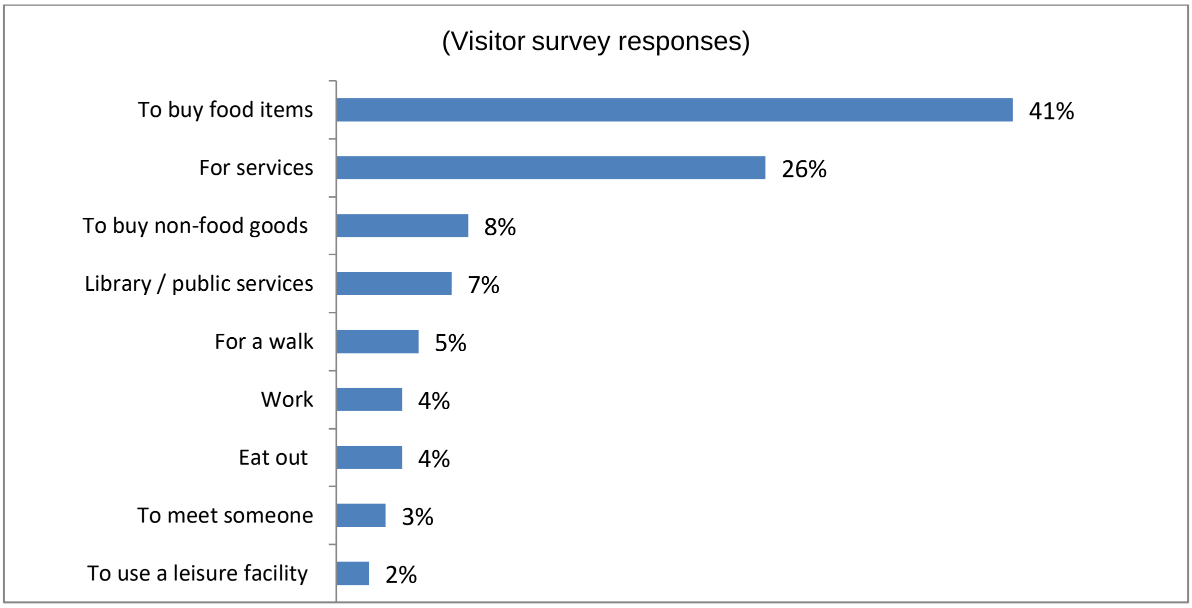

3.72 **Length of stay** - the vast majority of in-centre survey respondents stated that they visit the town centre for one hour or less, which highlights the opportunity to increase dwell time.

**Figure 3.8 How long do you intend to stay in Chertsey today?**



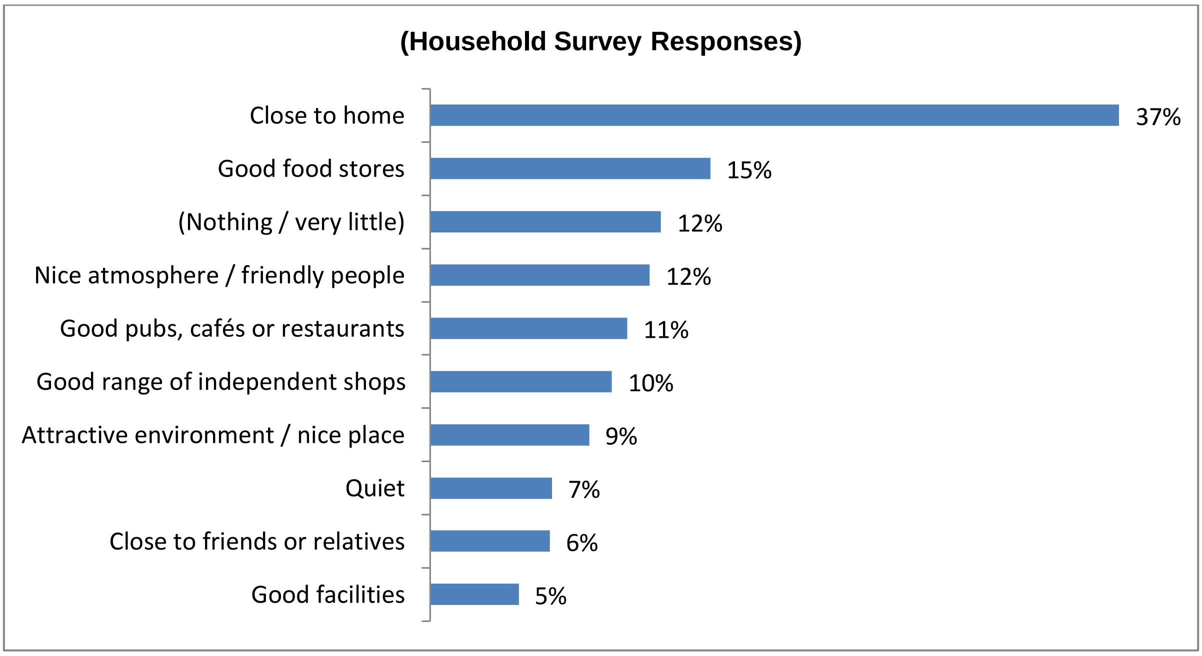
3.73 **Reason for visit** – respondents are mainly visiting the town centre to carry out food shopping (46%), while over a quarter are accessing services (i.e. personal and financial services). Only 8% of respondents stated their main reason for visiting was to visit non-food shops. The results confirm that the town centre is mainly serving a food shopping and service role.

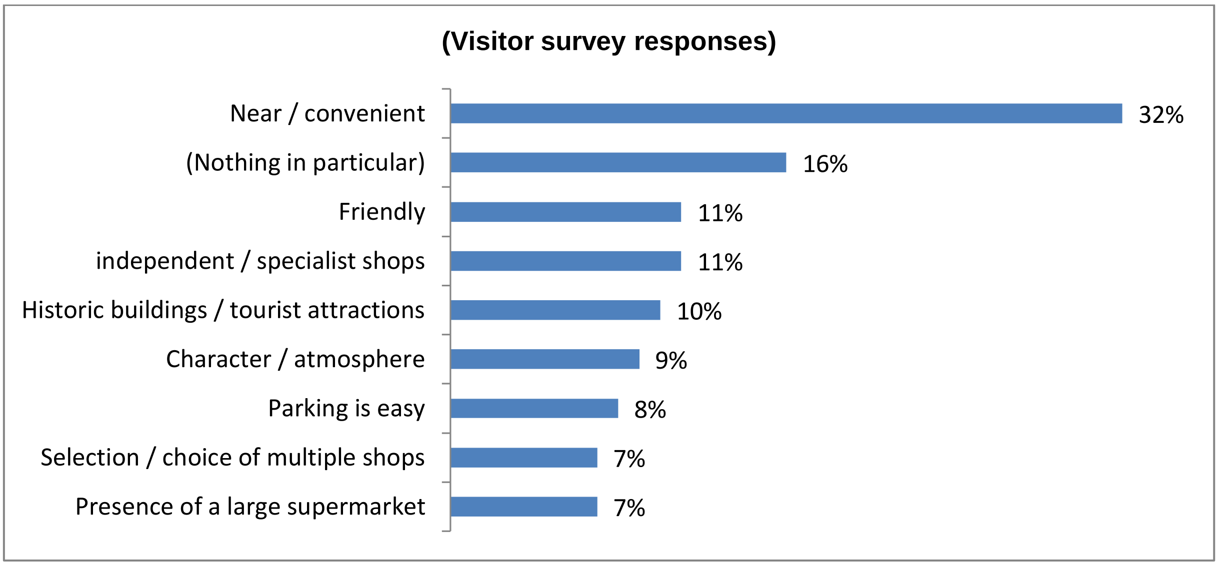
**Figure 3.9: What is your main reason for visiting Chertsey today?**




3.74 **What is liked most about Chertsey** – apart from being near and convenient to home, what respondents to the visitor survey liked most about the town related to its character and feel, rather than what the town physically offered in terms of town centre uses. Conversely, aside from the town's proximity to home, respondents to the household survey were more likely to highlight the town's foodstore provision as a factor they liked most about Chertsey, followed by the town's independent shops and food and beverage outlets.

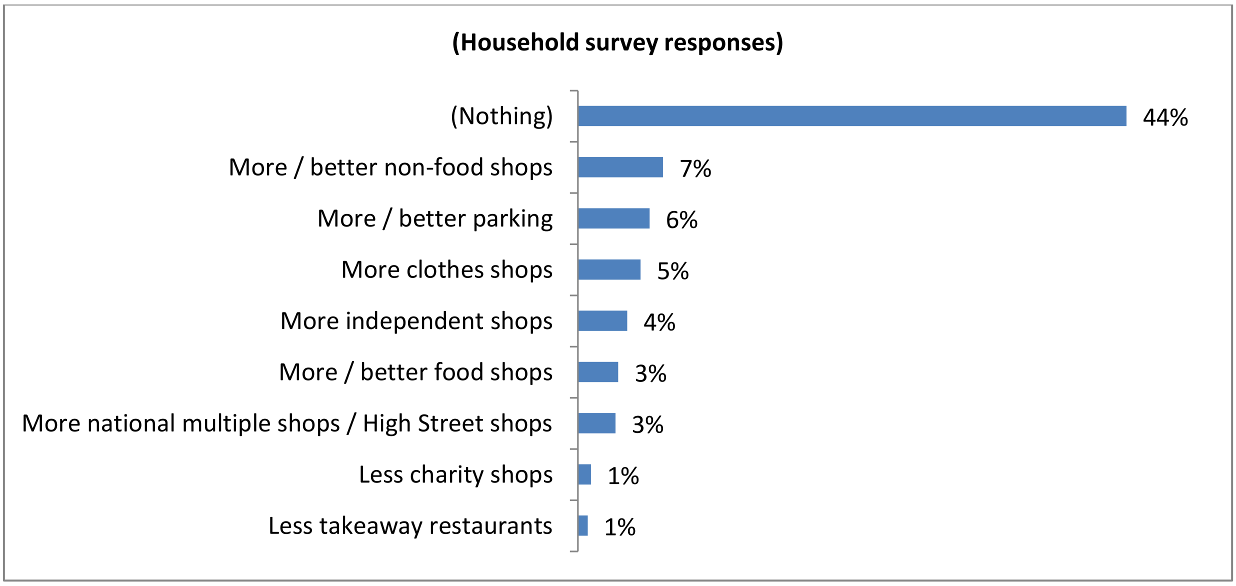
**Figure 3.10: What do you like most about Chertsey?**





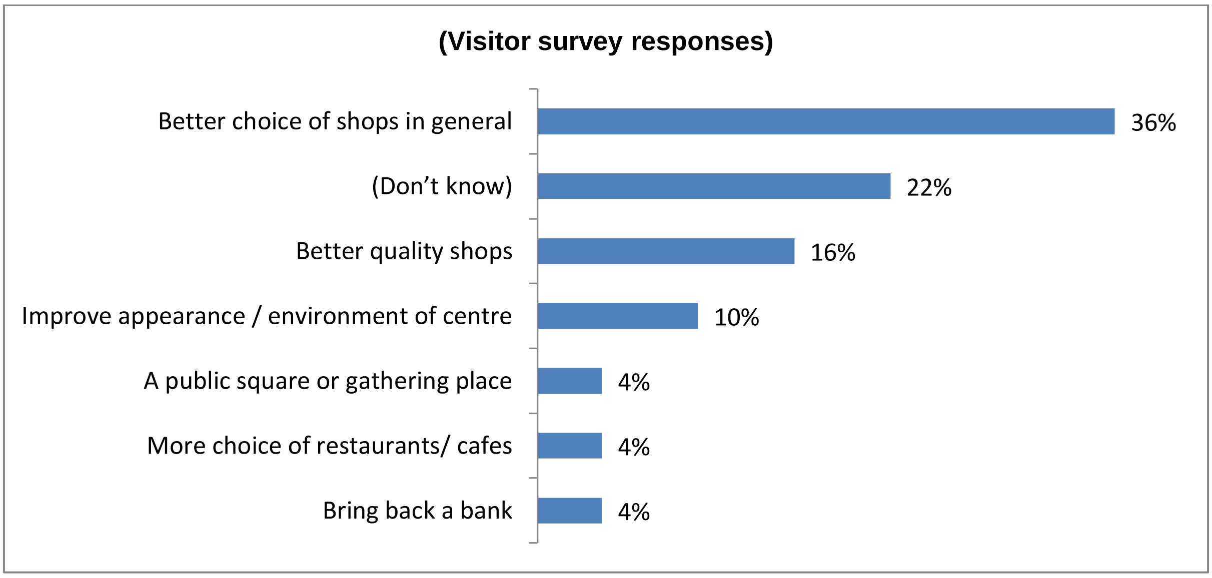

3.75 **What improvements are needed to encourage more trips** – respondents to the visitor and household survey both were more likely to highlight the need to improve the choice of shops in the town centre, particularly in respect to non-food shopping offer (such as clothing) and the quality of shops. Respondents were less concerned about parking and the physical environment, although it is noted that respondents to the visitor survey were more concerned about improving the town centre environment than respondents to the household survey.

**Figure 3.11: What improvements would encourage you to visit Chertsey more often?**



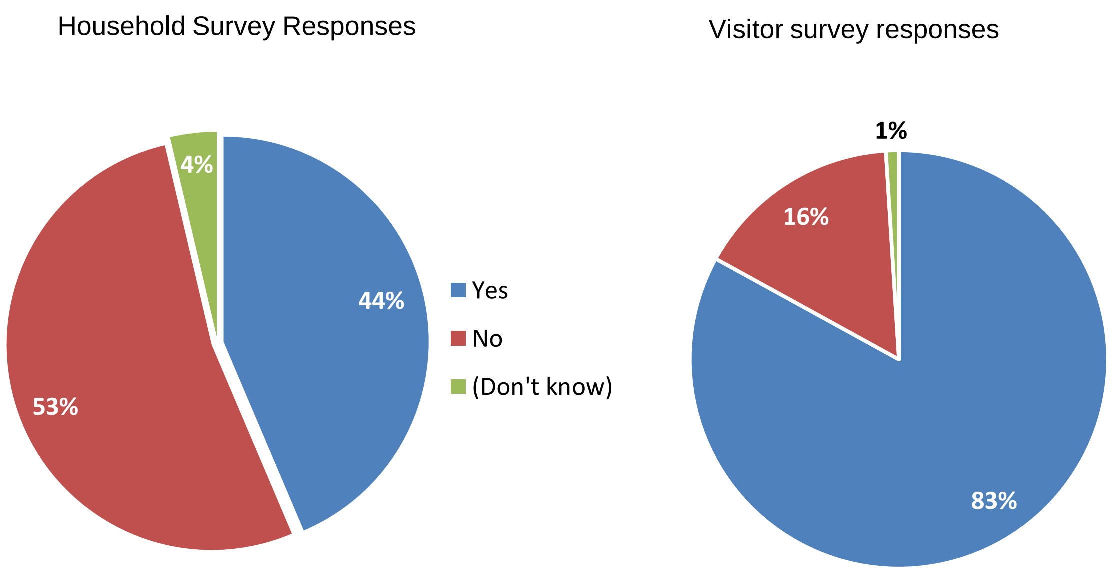

Note: Responses from respondents living in Zones 1 to 6

**Figure 3.12: What does Chertsey need to make it a better town centre for everyone?**




3.76 **Events and markets** – respondents to the visitor survey were asked what kind of events would encourage them to visit the town more often with almost all respondents stating a market. When asked whether a regular street market would encourage respondents to visit the town centre more often, respondents to both surveys overwhelmingly stated yes, with respondents to the visitor survey stating that they would like to see more food producers and a better range of stall holders within a new regular market. The responses from the two surveys clearly indicate strong support for a regular street market.

**Figure 3.13: Would the introduction of an improved and regular street market encourage you to visit Chertsey more often?**



## Summary

3.77 In summary, we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Chertsey Town Centre below:

| **Strengths** |
|---|
| Strong foodstore offer that includes Sainsbury's and Aldi. The opening of Aldi in 2017 has helped to boost convenience goods expenditure in the town centre, particularly from residents living beyond the town's surrounding catchment. |
| There is further demand from the foodstore market with Lidl actively seeking a site in the town centre. |
| Historic connections and architecture adds character to the town's environment and sets it apart from other towns in the Borough. The town's environment is highlighted by town centre visitors as the feature they liked most about the centre. |
| Opening of new independent retailers on Guildford Street may encourage other independents to open in the town centre. |
| The presence of office workers helps to support daytime trade, but this sector is vulnerable (see 'Weaknesses'). |
| Chertsey has a good supply of car parking and within easy walking distance of shopping streets. |
| The Chertsey Museum is a particularly popular leisure attraction with residents in the Borough. |
| The Goose Fair is a popular annual event that attracts many visitors to the centre and highlights the popularity of outdoor community events (see 'Opportunities'). |

| **Weaknesses** |
|---|
| The elongated nature of the town centre, particularly the length of Guildford Street has led to areas of inactivity. The consequence of which is that the town centre is fragmented with and has created a divide between commercial activity to northern end of the town centre (London Road and the northern end of Guildford Street) and the southern end of the town centre. |
| The town's retail function has diminished over the years, which is in line with national trends. However, this has led to many vacant shops on Guildford Street. This has limited the town's role to that of a food retail and service centre. |
| The absence of a regular street market is notable, particularly given the growing popularity of markets; demand for which has been influenced by the pandemic where shoppers have sought out environments that are perceived to be more COVID safe (see 'Opportunities'). |
| Historic buildings in commercial use will limit their potential for modernisation to suit the requirements of many commercial tenants. This will in turn limit the potential to attract commercial brands. |
| The vacancy rate improved between 2017 and 2019, but since then the vacancy rate has been on the rise. However, it is noted vacant units in Chertsey are less likely to be vacant in the long term based on recordings of vacancies over the past five years. |
| The town's daytime economy is supported to an extent by trade from office workers as evident from in-centre survey, footfall counts, and presence of offices. However, many offices surrounding the town centre have been converted to residential use or are earmarked for conversion, which will impact on daytime trade for retail and service operators. However, this also presents an opportunity to attract new residential expenditure (see 'Opportunities'). |

| **Opportunities** |
|---|
| Build on independent offer, which is popular with town centre users and residents. This will help to differentiate the town from Addlestone and Egham, and competitors beyond the Borough. |
| Potential to make more parts of the town centre more pedestrian friendly and encourage café culture and events. This could apply along parts of Guildford Street by removing parking spaces to |

allow outdoor seating for cafes and restaurants, and create a safer pedestrian environment in general.

Investment in public realm and building frontages will create a more attractive environment. This particularly applies to building frontages along Guildford Street and High Street where ad hoc alterations and poor maintenance have had an impact on the streetscape. This will require buy-in from freeholders and leaseholders to invest and maintain their property.

Work with asset owners to create more favourable lease structures and rents to support independents and to diversify away from retail offer, particularly along Guildford Street where vacancies are more prevalent.

Potential to bring back into use or repurpose the Kings Head public house on Guildford Street. The building could be repurposed as a multi-use venue that supports daytime and evening time trade.

Creating more greenspace in the heart of the town centre will encourage more people to visit the town centre and promote linked trips to commercial facilities. The library site presents a good opportunity to create an urban green space that would link the two ends of the town centre.

Market research (including the findings of the household survey and visitor survey) show very strong support for a regular street market, particularly one that supports a broad range of stallholders and aimed at food produce.

Office to residential PDR conversions will result in an increase in the town's resident population and in turn the availability of retail and leisure expenditure. There is an opportunity for existing and new town centre businesses to attract this expenditure, but it will be dependent on meeting the needs and aspirations of new residents.

**Threats**

The town will always compete with Addlestone for convenience goods market share where Tesco Extra is drawing custom from Chertsey's shopping catchment and centres beyond the Borough for non-food shopping purchases (e.g. Staines-upon-Thames).

Whilst the town benefits from two foodstores, these stores are relatively small and as highlighted above, many catchment residents are travelling to Addlestone to carry out food shopping where they have access to a larger foodstore.

Market research found that town centre users and catchment residents are not satisfied with current retail provision and will continue to shop elsewhere for these goods. However, this also presents an opportunity to improve retail offer (see 'Opportunities').

Online shopping presents the biggest threat to the town centres and represents stronger competition than competing centres outside of the Borough for non-food goods in particular.

The introduction of use Class E could lead to the loss of the town's occupied retail and leisure units, which could have a significant impact on the town's ability to attract shoppers. This is some concern that certain personal service operators may proliferate street frontages (e.g. nail bars, tanning salons) which would impact on the investment potential of the town centre, particularly the ability to attract better quality commercial operators.

The potential impact of new Permitted Development Rights (PDR) allowing changes from use Class E (including shops and offices) to residential (Class C3) outside of planning controls. The loss of office space could be a weakness, particularly where conversions have resulted in viable office space being repurposed for higher value residential use.

3.78 Overall, the town centre's economy is driven by the presence of two foodstores and supporting service uses. The town is performing reasonably well against Key Performance Indicators, but would benefit from a new focus on drawing new daytime trade and opportunities to develop the evening economy. Market research indicates a desire from town centre users for a better retail offer, which could be delivered by supporting independent retail businesses. There is also overwhelming support to reintroduce a regular street market, particular where it improves the range of stallholders and food produce.

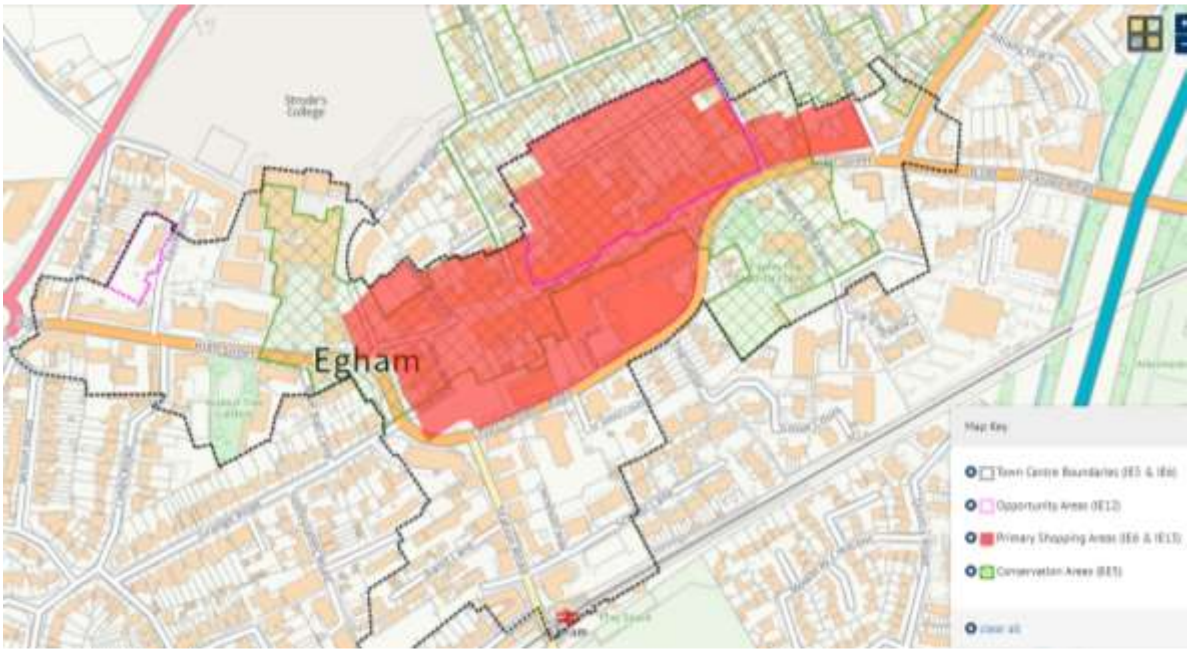
# 4. EGHAM TOWN CENTRE

4.1 Egham is a university town in Runnymede, with the Royal Holloway located to the south west of the town centre. Strode's College is located adjacent to the town centre and this student population contributes to the town's daytime vibrancy.

4.2 The town has historical significance with the Magna Carter sealed to the north of Egham. The town centre itself is part of a Conservation Area, the majority of which is focused along, and north of, the High Street.

4.3 As the figure below shows, the town centre boundary for Egham extends the entire length of High Street from the Egham By Pass to the west to The Avenue to the east. The Primary Shopping Area is focused on the length of High Street between the junctions with Church Road and Denham Road, and comprises most of the town's retail and leisure businesses.

**Figure 4.1: Egham Town Centre Boundary & Primary Shopping Area**




Source: Runnymede Local Plan Interactive Map (http://maps.runnymede.gov.uk/website/maps/index.html#)

4.4 The town has been the focus of new investment in recent years. A large-scale mixed-use scheme is currently underway in the town centre. Known as Egham Gateway West, the scheme will deliver 100 new homes, 1,300 sqm of flexible commercial/ retail space, a boutique cinema, and new, high quality public realm.

4.5 There is further opportunity for investment in the town centre through the High Street North Opportunity Area, which is allocated in Policy IE12, which we consider further in Section 9, Volume A. Here policy supports a comprehensive redevelopment of the 2.5 ha opportunity site, which would utilise dead space taken by service yards, consolidation of existing car parks, and the redevelopment of the existing Tesco store.

## Diversity of Uses

4.6 A total of 143 town centre units were recorded in Egham Town Centre in January 2022 of which 123 are in active use (i.e. 86% occupied). The majority of units are made up of retail (43 outlets which include both comparison and convenience retail), leisure (33), and service (40) uses. The table below shows how the mix of occupied units has changed since 2017. It shows that all outlets have decreased in number since

2017, with the decline greatest for service uses (-14 outlets). Overall, the number of occupied commercial outlets has fallen by 28 outlets since 2017.

**Table 4.1: Diversity of Uses by Occupied Outlets**

| Classification | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | Change 2017-2022 |
|---|---|---|---|---|---|---|---|
| Comparison Retail | 37 | 34 | 32 | 35 | 32 | 29 | -8 |
| Convenience Retail | 16 | 16 | 14 | 15 | 13 | 14 | -2 |
| Leisure | 34 | 37 | 38 | 35 | 37 | 33 | -1 |
| Service | 54 | 54 | 55 | 51 | 46 | 40 | -14 |
| Total | 151 | 150 | 149 | 144 | 136 | 123 | -28 |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

### *Comparison Retail*

4.7 Overall, there has been a steady decline of 2-3 units per year in comparison retail in the town centre, with the exception being 2020, which had an increase in 3 units. This generally reflects the UK trends in most centres because of the demand dropping for physical stores, high street brands consolidating in stronger and larger shopping areas. Comparison retail offer is made up of a varying mix of retailers, with 'DIY, Hardware, Builder's Merchants & Household Goods' standing out as being consistently higher in number than the comparison categories.

4.8 The table below shows how the mix of comparison outlets has changed between 2017 and 2022.

**Table 4.2: Comparison Goods Categories by Outlet in Egham (2017-2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Books, Arts & Crafts, Stationery, Printers | 3 | 3 | 3 | 3 | 3 | 3 |
| Car & Motorbike Showrooms | | | | | | |
| Charity & Secondhand Shops | 9 | 7 | 7 | 8 | 6 | 5 |
| Chemists, Toiletries & Health | 6 | 6 | 5 | 6 | 5 | 4 |
| Department Stores & Mail Order | | | | | | |
| Discount & Surplus Stores | | | | | | |
| DIY, Hardware, Builder's Merchants & Household Goods | 7 | 7 | 7 | 7 | 7 | 7 |
| Electrical Goods & Home Entertainment | 4 | 4 | 3 | 3 | 3 | 4 |
| Fashion & General Clothing | 1 | 1 | 1 | 1 | 1 | 1 |
| Florists & Garden | | | | | | |
| Furniture, Carpets, Textiles, Bathrooms & Kitchens | 4 | 4 | 4 | 4 | 4 | 3 |
| Gifts, China & Leather Goods | | | | | | |
| Jewellers, Clocks & Watches | 1 | 1 | 1 | 1 | 1 | 1 |
| Pet Shops & Pet Supplies | 1 | 1 | 1 | 2 | 2 | 1 |
| Sports, Toys, Cycle Shops & Hobbies | 1 | | | | | |
| Total | 37 | 34 | 32 | 35 | 32 | 29 |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

4.9 The table shows that the comparison retail climate has remained steady since 2017, with charity shops and second hand shops being the only category to decline substantially, from nine outlets to five. Six categories have no representation at all and no category has an increase in representation in 2022, compared to 2017.

4.10 As the majority of the comparison categories in Egham are reasonably well represented, with many of the categories above having 3+ outlets each, the potential for further openings may be focussed in the areas that are not represented at all, and which may align with the student population, discount stores and sports stores for example.

### *Convenience Retail*

4.11 The convenience retail sector has remained relatively steady in the six-year period to January 2022. 'Groceries, Supermarkets & Food Shops' experienced a significant increase in representation from one to nine outlets. The town also lost its only bakery in that time period.

4.12 The town is anchored by Tesco and Iceland, and a Waitrose. Tesco and Iceland both have entrances on the High Street, which would automatically attract footfall, although Waitrose would also likely support footfall and be a key generator of town centre retail turnover. The table below shows that the town centre only has a small mix of convenience retailers comprising day-to-day grocers and food shops (9), CTN (confectionists/ tobacconists/ newsagents) (4), and a petrol station.

4.13 The table below shows how the mix of convenience outlets has changed between 2017 and 2022.

**Table 4.3: Convenience Goods Categories by Outlet in Egham (2017-2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Bakers | 1 | 1 | 1 | 1 | | |
| Butchers & Fishmongers | | | | | | |
| Confectionery, Tobacco, Newsagents | 4 | 5 | 3 | 3 | 4 | 4 |
| Groceries, Supermarkets & Food Shops | 1 | 9 | 9 | 9 | 8 | 9 |
| Petrol Filling Stations | 1 | 1 | 1 | 2 | 1 | 1 |
| Total | 7 | 16 | 14 | 15 | 13 | 14 |

## Service

4.14 Egham has 40 service outlets, which include a mix of personal and professional services, which is a reduction from 54 recorded in 2017. This is an interesting trend as it contradicts trends nationally which have found service outlets increasing in town centres. The table below shows the type of categories of service outlets trading in the town centre since 2017

**Table 4.4: Service Categories by Outlet (2017 to 2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Auto & Accessories | 1 | 1 | 1 | 1 | 1 | 1 |
| Auto Services | 1 | 1 | 1 | 1 | 1 | 1 |
| Banks, Financial Services & Building Societies | 5 | 5 | 5 | 4 | 4 | 2 |
| Employment & Post Offices | 2 | 3 | 2 | 2 | 2 | 1 |
| Estate Agents & Auctioneers | 8 | 6 | 5 | 5 | 6 | 5 |
| Hairdressing, Health & Beauty | 26 | 27 | 3 | 27 | 24 | 24 |
| Household & Home | 1 | 1 | 1 | 1 | | |
| Launderettes, Dry Cleaners & Other | 3 | 4 | 4 | 4 | 4 | 2 |
| Locksmiths, Clothing Alterations & Shoe Repairs | 1 | 1 | 1 | 1 | 1 | 1 |
| Pawnbroking & Cheque Cashing | 1 | 1 | 1 | 1 | | |
| Travel Agents & Tour Operators | 1 | 1 | 1 | 1 | | |
| Total | 54 | 54 | 28 | 51 | 46 | 40 |

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

4.15 Of the town's service provision, the vast majority relates to 'Hairdressing, health and beauty' (24). The categories with no representation include Household and Home, Pawnbrokers and cheque cashing, travel agents and tour operators.

### *Leisure*

4.16 There are 33 leisure outlets in Egham, which is consistent with the amount in 2017, a decrease of only one. The overall representation has also remained steady, highlighted in the table below.

**Table 4.5: Leisure Categories by Outlet (2017 to 2022)**

| Category | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|
| Accommodation | 1 | 1 | 1 | 1 | 1 | 1 |
| Bars, Pubs & Clubs | 5 | 5 | 6 | 6 | 7 | 6 |
| Cafes & Fast Food | 14 | 16 | 16 | 16 | 17 | 14 |
| Entertainment | 3 | 3 | 3 | 3 | 3 | 3 |
| Restaurants | 11 | 12 | 12 | 9 | 9 | 9 |
| Total | 34 | 37 | 38 | 35 | 37 | 33 |

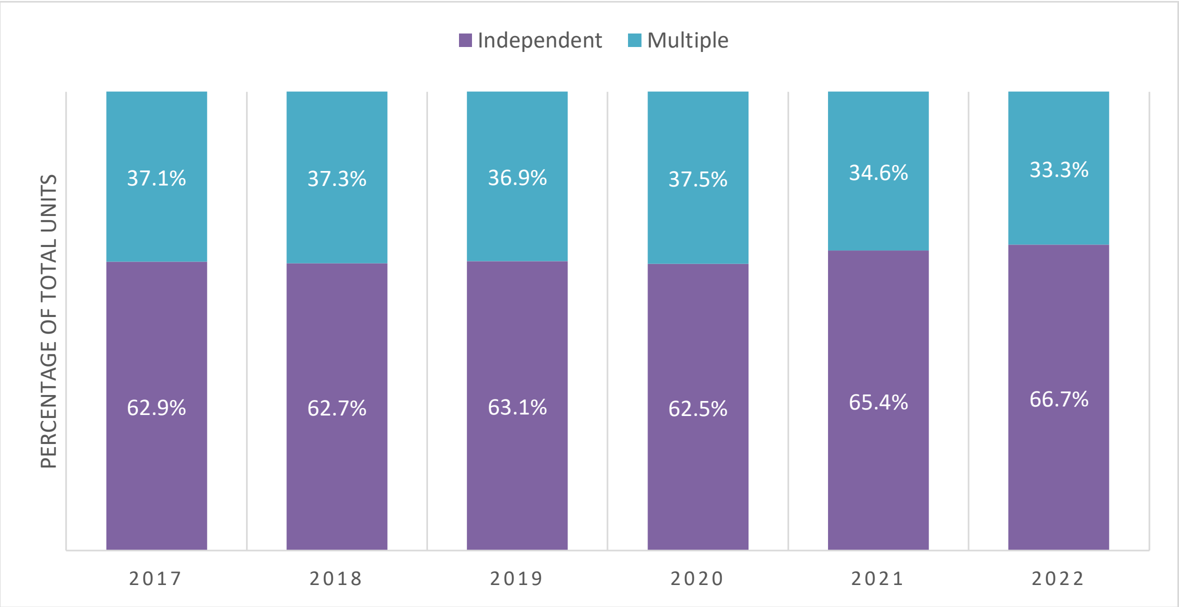
Source: Local Data Company, Surveys undertaken between 2017 and January 2022

4.17 As the table shows, almost half of the leisure outlets include cafes and fast food (14). Restaurants also have a large presence (9) although declining slightly since 2017 this demonstrates that Egham is well supported by F&B retail. The non-F&B retail account for just over approximately 12% of the leisure on offer.

## Retailer Representation, Demand and Requirements

4.18 The independent business types in Egham account for two thirds of the retail outlets (66.7%), which totals 82 outlets. This emphasises how important independents are in supporting shopping expenditure in the town centre. The figure below illustrates the change of independent and multiple occupied units since 2017, which shows that the percentage of multiples has fallen by almost 4% since 2017.

**Figure 4.2: Mix of Independents and Multiples in Chertsey (2017-2022)**




Source: Local Data Company, Surveys undertaken between 2017 and January 2022

4.19 The representation of national multiples outlets, in January 2022, totalled 41, which is 33.3% of retail outlets in Egham. Although there are fewer multiples retailing outlets, the key retail anchors serving the town are Waitrose and Tesco with Iceland acting as a supporting store. Well-known comparison retailers are relatively limited, with the most popular high street retailers being Boots and Holland and Barrett. A list of all retail multiples recorded in the town centre is set out in the table below.

**Table 4.6: Retail Multiple Representation**

| Convenience | Comparison | Service | Leisure |
|---|---|---|---|
| Caffe Nero | Woking & Sam Beare Hospice | Johnsons | Travelodge |
| Costa | Princess Alice Hospice | Natwest | The Red Lion |
| Wild Bean Café | British Heart Foundation | Timpson | The White Lion |
| Best-One | Boots | Nationwide | The Crown |
| Marks & Spencer | M&CO | | The Kings Arms |
| Domino's | Magnet | | |
| Subway | Card Factory | | |
| Iceland | Holland & Barrett | | |
| Prezzo | Specsavers | | |
| Waitrose | Specsavers HearCare | | |
| Tesco | Superdrug | | |

4.20 The town centre has a unique service offer, in relation to Chertsey and Addlestone, having a bank, the other centres having no representation in this category (although Addlestone has a Nationwide building society). There are the same number of convenience and comparison outlets, albeit the comparison multiples are not the most popular. Egham also offers a modest range of public house multiples several of which are franchises of The Greene King, and budget hotel multiple in Travelodge

4.21 As of April 2022, a review of published operator requirements identified 8 recorded requirements from retail and leisure operators in the last 18 months, some of which are recorded as confidential and others more appropriately for out of town locations. Combined, the retailers most suitable for town centre accommodation are seeking up to approximately 9,383 sqm.

4.22 Of the Borough's three town centres, Egham has attracted greater interest from retail and leisure brands. This will be influenced by existing offer and significant investment that is occurring in the town centre. The full list of recorded retail and leisure operator requirements is listed in the table below.

**Table 4.7: Retail and Leisure Requirements – April 2022**

| Recorded Date | Operator | Type | Floorspace Requirements (sqm) | |
|---|---|---|---|---|
| | | | Minimum | Maximum |
| Mar-22 | Lidl | Supermarket | 1,672 | 2,415 |
| Feb-22 | David Lloyd Leisure | Health and Fitness | 3,716 | 0 |
| Jan-22 | Aldi | Supermarket | 1,672 | 2,044 |
| Nov-21 | The Range | Retailer | 1,394 | 2,787 |
| Oct-21 | Windsor and Eton Brewery | Bar and Brewery | 139 | 465 |
| Apr-21 | Camile Thai | Food Retailer | 84 | 139 |
| Mar-22 | Age UK | Charity | 279 | 1,394 |
| Jan-22 | VPZ | Electronic Cigarettes | 46 | 139 |
| **Total** | | | **9,002** | **9,383** |

Source: The Requirements List, April 2022.

4.23 Of note, both Aldi and Lidl are seeking representation in the town centre, the addition of one or both would plug the current gap in discount foodstore offer. The Range is also seeking accommodation. Of particular interest is that David Lloyd Leisure has a requirement for a new site in Egham; a quality leisure brand that would be boost to the town's gym offer.

4.24 Agents within the Egham area have reported that the retail market is buoyant, not falling away too much during the pandemic, and rents remaining steady and is mainly supported by interest from independents.

4.25 The quality of retail offer in the town centre can be categorised into three different groups: mass market, premium, and value. The figure below shows that the town's offer is mainly supported by mass market retail, with a higher representation compared to Addlestone and Chertsey. It also supports feedback from commercial agents that retail has remained steady over the six-year period. Egham is the only town centre in the Borough where a premium offering is identified, which is due to the presence of Waitrose.

**Figure 4.3: Quality of Retail Offer in Egham Town Centre**

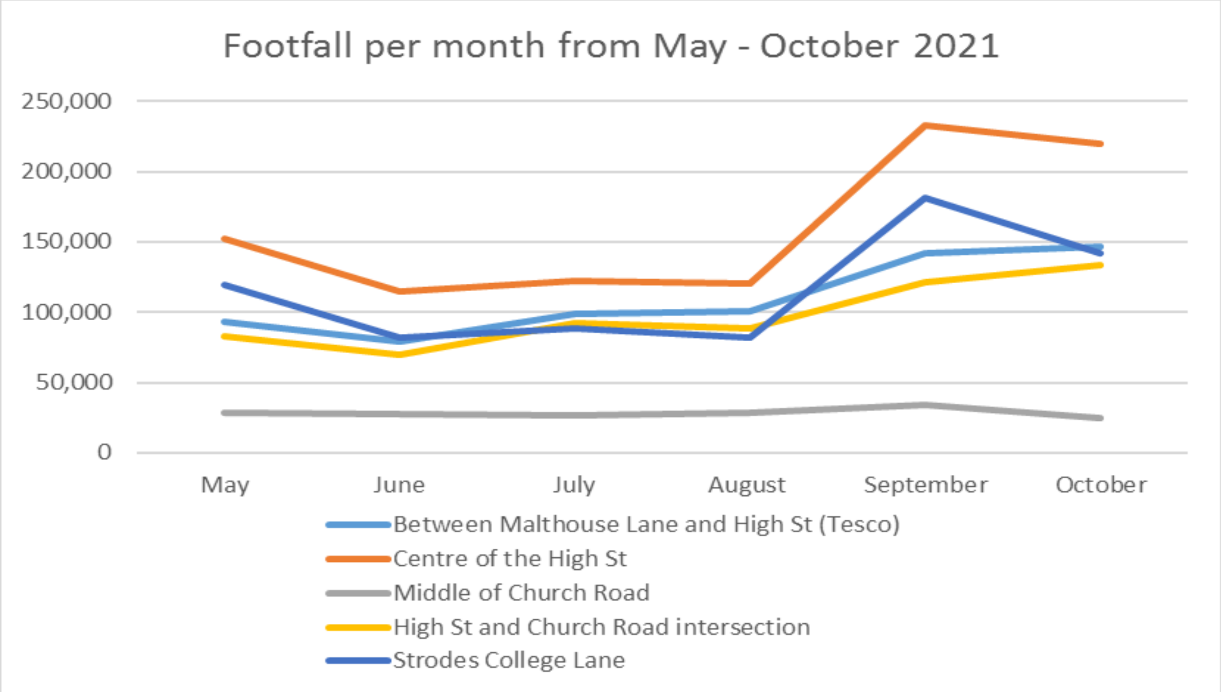

Source: Local Data Company, Surveys undertaken between 2017 and January 2022

## Pedestrian Flows

4.26 Footfall data has been gathered from Datscha, who harvest data from over 10 million mobile devices. This data is provided by Fetch Analytics who access 80+ sources including mobile apps, wifi hotspots and telecom providers (anonymised and GDPR compliant).

4.27 Five locations were considered across the town centre, mostly located in and around the High Street area. The figure below sets out the footfall counts of the locations from May 2021 to October 2021.

**Figure 4.4: Footfall Counts in Egham between May – October 2021**




4.28 Looking at the individual count locations, the centre of the high street attracts the largest amount of footfall. This is a good representation of the high street being the main attraction of footfall. Interesting, foot counts recorded in this area in October 2021 are higher than pre-pandemic levels recorded in October 2018 (206,614). The lowest footfall sample location recorded in Chertsey was in Church Road, near the Waitrose car park. This is likely due to a lack of services and amenities here, and which may encourage customers to park and move towards the Waitrose and the High Street.

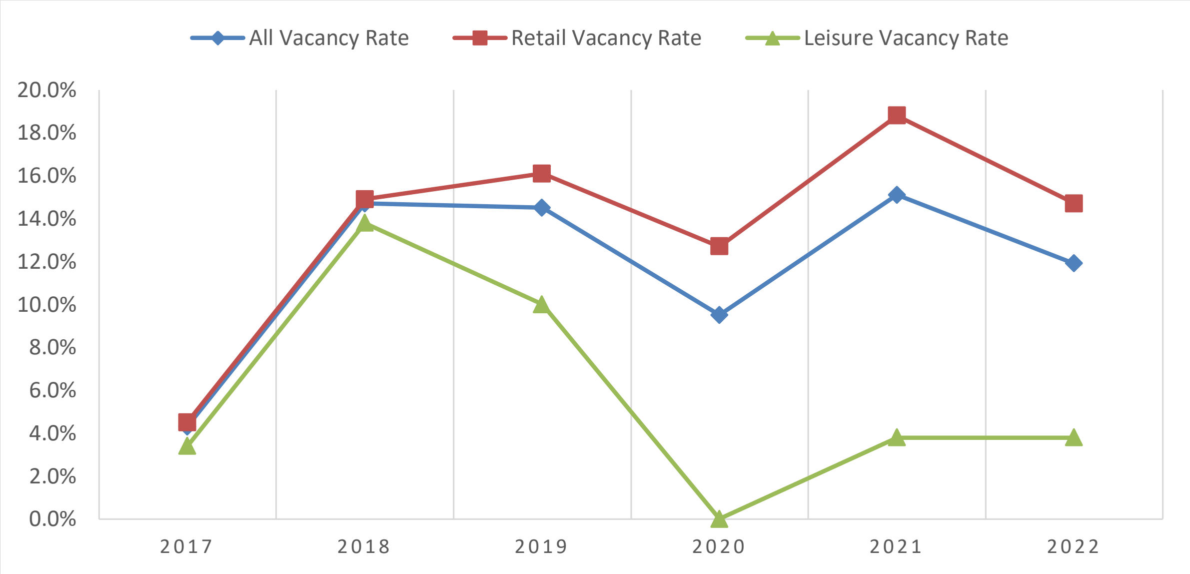
4.29 The other locations have similar levels of footfall. The College Lane footfall increasing significantly between August and September presumably as the students are back. About the High Street and Church Road intersection, footfall is also relatively high, we presume that many of the local residents to the south of the High Street will access the town via Station Road and head towards this intersection, again highlighting why footfall would be lower on Church Road towards the Waitrose.

4.30 Datscha also identified that weekday footfall is only slightly higher than the weekend average and that daytime footfall levels peak at lunchtime. This is likely to be influenced by foodstore customers and students.

## Vacancies

4.31 The LDC survey found 20 vacant units in Egham Town Centre in January 2022, which equates to a vacancy rate of 14.7%, which is higher that the GB vacancy rate of 14.3% identified by LDC. The vacancy rates in Egham have peaked and troughed, with very low rates during 2017, peaking during 2018, dropping again in 2020 before rising and falling again over the course of 2021 and 2022 (see Figure 4.5 below). Leisure has improved most noticeably, with levels remaining low since 2019.

**Figure 4.5: Vacancy rate for retail and leisure units in Egham between 2017 and January 2022**




Source: Local Data Company, Surveys undertaken between 2017 and January 2022

## Commercial Property Indicators

4.32 Feedback from commercial property agents operating in the town centre indicated that retail rents are performing reasonably well and currently sit at around £65 per sqft for prime retail pitches on the High Street. In more secondary retail pitches rents are achieving values of circa £56 per sqft.

4.33 Egham is viewed by prospective commercial tenants as a vibrant town that benefits from an affluent population and student presence. As such, there is strong interest from the market, which has increased since the town centre footfall has returned following the lifting of Government lockdown measures relating to the pandemic. Of note, the return of students is seen as a positive feature for the town, which highlights how valued the student pound is to investors.

4.34 Retail units are gaining multiple offers, which mean that there is competition, and units are being let with relative ease.

4.35 The new Magna Square development has 85% of its Student Accommodation let, and the retail units are currently being built, or just recently completed, with more potential to support the commercial market in Egham. A Nando's has recently been let in the development.

4.36 The Precinct, which lies south of the High Street, is mostly owned by the Council and would be considered slightly trickier to rent due to a lack of rear loading. These units tend to go for £20 per square foot, but the Council are considering redeveloping most of the area through the Egham Gateway East allocation (Policy IE9).

4.37 With large existing companies such as Belron International Ltd, Enterprise Holdings, Gartner and others, Egham is considered by local agents as an attractive location for investment.

## Opening times and Evening Economy

4.38 Over twenty retailers were sampled in Egham to include convenience, comparison food & beverage (F&B) providers, amongst others. The majority of the samples were taken from the High Street area.

4.39 This identified that the majority of comparison retailers open around 9:30am and close between 5pm and 6pm. On Sundays, the comparison retail is also available, usually between the hours 10am-4pm.

4.40 The key convenience retailers open earlier from 7:30am and close later, the latest closing at 10pm. They also open on Sundays, although opening later and closing earlier. These stores include Tesco and Waitrose and would be considered key anchor stores for the area.

4.41 F&B providers do appear to have unrelated opening schedules, opening and closing at different times, some closing on Sundays. This is a result of the various types of F&B providers, such as a café and a fast food outlet, the former type preferring to close on Sundays, and bars and pubs, which close later.

4.42 The bars and pubs add to a modest night-time economy, and in addition, with the majority of retailers opening on a Sunday, Egham appears to have a reasonable economy.

**Table 4.8: Sample of Business Opening Hours in Egham**

| | Open | Close | Sunday | Type |
|---|---|---|---|---|
| William Hill | 8 | 10pm | 10-9pm | betting |
| Boots | 8:30 | 6 | 10-4 | comparison |
| Card Factory | 9 | 5:30 | 10-4 | comparison |
| Egham essentials | 9:30 | 6 | 10:30-5 | comparison |
| Princess Alice Hospice | 9:30 | 5 | 10-4 | comparison |
| Superdrug | 9 | 6 | 10-5 | comparison |
| M&CO | 9:30 | 5 | 11-4 | comparison |
| Holland and Barret | 9:30 | 5 | 10-4 | comparison |
| Post Office | 8 | 5:30 | closed | convenience |
| Tesco | 7:30 | 10pm | 11-5 | convenience |
| Waitrose | 8 | 8pm | 11-5 | convenience |
| Iceland | 8 | 6 | 10-4 | convenience |
| Natwest | 9:30 | 4 | closed | Bank |
| Egham Charcoal Grill | 12 | 12:30am | same | F&B |
| The Cups | 11 | 6pm | closed | F&B |
| Eggham on Toast | 8 | 3pm | same | F&B |
| Villa Rosa | 12, 6 | 2:30pm, | 1-9pm | F&B |
| Runnymede chicken and ribs | 12 | 12 | Same | F&B |
| Bar 163 | 11 | 11 | closed | F&B |
| Constitutional club | 10 | 11 | 12-7 | F&B |
| The Red Lion | 11:30 | 11 | 12-10:30 | F&B |
| Crown Egham | 10 | 11 | same | F&B |
| Café Nero | 6:45 | 5:30 | 8-5 | F&B |

## Barriers to Business

4.43 Currently, the economic climate is uncertain due to COVID-19 and Brexit. This uncertainty results in a more cautious market with many businesses putting expansion plans on hold and taking fewer risks. This coincides with the burden of business rates, which is a cause for real concern when they return once the government halts this assistance.

4.44 The retail market has been changing dramatically over the last decade and the recent challenges highlighted above have exacerbated this shift. However, the retail market in Egham has remained steady, which implies that Egham is attractive to new investors, demonstrated by recent lettings and relatively strong requirements from the retail and leisure sectors.

4.45 Feedback from local stakeholders suggested that a significant barrier to business growth was due to the unsuitability of the accommodation for business use. This related mostly to the high street having little to no rear access which makes deliveries difficult and the accommodation limiting the diversity of business types as a result.

4.46 Other barriers to businesses gathered through stakeholder feedback included the loss of short stay parking and that the two biggest car parks are associated with anchor stores, Tesco and Waitrose, which were suggested to discourage shoppers from using the high street.

4.47 In relation to the recovery after the Pandemic, stakeholders stated that they did not see clear signs of recovery and that there was not a noticeable bounce back. Furthermore, although business rates were brought up as an ongoing problem, the issue was considered unresolvable and therefore stakeholders are bringing this up less and less.

## Accessibility and Pedestrian Mobility

4.48 The town centre is located along High Street, which is very walkable and can be traversed from east to west in under 10 minutes. The majority of the High Street is also clearly signed as a Pedestrian Zone with a speed limit of 20mph, where vehicles are restricted from entering at certain times (Mon-Sat 11am-4pm) and there are automatic bollards in operation. Within the pedestrian zone, there is a one-way traffic system in place. Upon leaving the pedestrian zone of the town centre, a 30mph speed limit applies.

4.49 The pedestrian zone, speed limit, and one-way system all contribute to a safer pedestrian environment and a high street that tried to cater for a more pedestrian feel. There are no major crossings over busy, fast trafficked roads and the pedestrian paving, although having various widths, are mostly wide and open. Where crossings are located, the road has been raised to the same level as the pedestrian footpaths; this also applies to two longer sections of the road along High Street, again giving a more shared surface feel to the high street. Bollards are also in place at these locations, which do create some separation, and limit a complete feeling of openness (along the Tesco for example) but this is obviously for pedestrian safety. It is recommend that this area opened up to create a more usable open space. This could also include the introduction of greenspace, such as a 'parklet'.

4.50 From the High Street, Waitrose is accessed via a pedestrian tunnel, which was relatively dark during observations, however it is wide, there are roof lights (which presumably come on at night), and there is artwork along the walls, which contribute to a more pleasant experience. With regards to wider accessibility, the Egham train station is located approximately a 5 minute walk from the centre of the High Street.

## Parking Provision

4.51 The High Street provides some on street parking, although there are a number of car parks within the town, which make up the majority of available parking. These include:

- Tesco Car Park Hummer Road Car Park - 84 spaces (Maximum stay 3 hours)
- Waspe Farm Car Park – 120 spaces (Max stay 2 hours)
- Egham Station Car Park - 57 spaces (Max stay 2 hours)

4.52 The Waitrose on Church Road also provides 140 spaces and up to 2 hours free parking for costumers.

## Crime and Safety

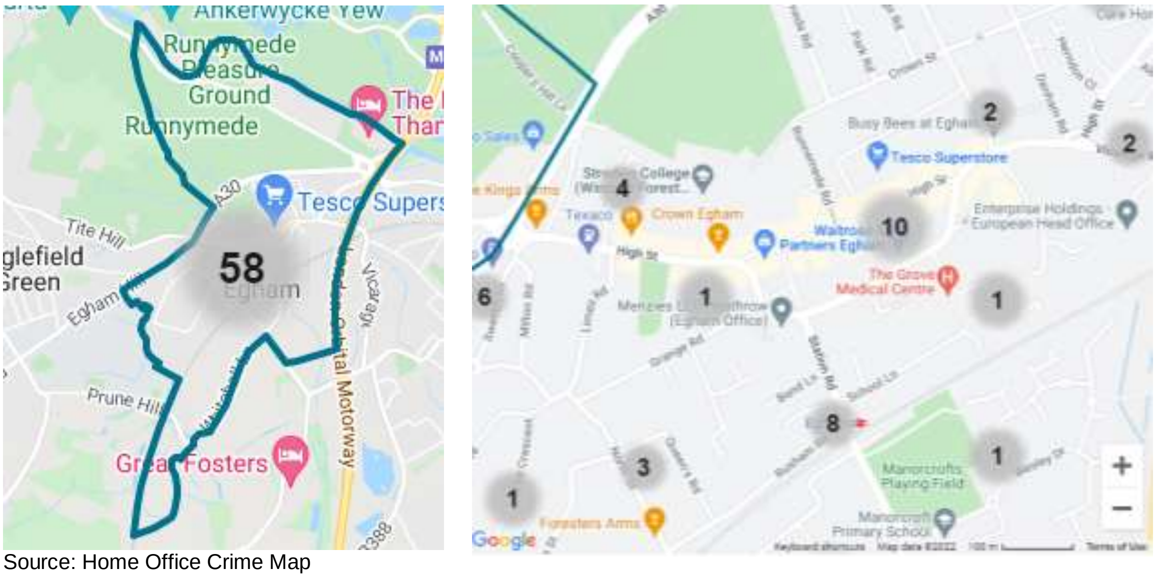
4.53 Crime data recorded by Surrey Police found that in the month of February 2022, 58 crimes were reported across Egham. The most common reported crimes were:

- Violence and sexual offences: 16

- Anti-social behaviour: 14
- Vehicle Crime: 6
- Other theft: 5

4.54 The settlement boundary as defined by Surrey Police and the more local hotspots are identified in the images below and shows that the majority of crime is located in the town centre, around Waitrose.

**Figure 4.6: Crime Map Settlement Boundary (left) and Hotspots for reported crime in Egham's town centre (right)**




Source: Home Office Crime Map

## Environmental Quality

4.55 The majority of Egham's town centre is washed over by a Conservation Area and has a rich historic and varied townscape with buildings from a number of periods, which are sought to be preserved and enhanced. There are also many listed buildings along High Street, which are predominantly listed as Grade II.

4.56 From observations, the buildings themselves are in good condition although some vacant shop fronts and 1st floor of Iceland are unsightly. Although some of the buildings have somewhat of an outdated art deco look other buildings have beautiful brickwork and architecture.

4.57 There are bins and benches located throughout the High Street, however many of these were not well maintained and some had been damaged without repair, but most looking tired and in need of a clean.

4.58 The condition of the roads and paving were good and it was noticeable that a lot of the paving was new, particularly around the Waitrose and towards the new Magna Square regeneration site, although the older paving was also in good condition.

4.59 The bollard barriers have a hard feel causing a separation from vehicles and pedestrians even though there is a shared surface feel to it with the road being raised to same level as pedestrian paving. Some areas of the town centre are greener than others, and there are clearly younger trees that have been planted which will grow given time. Still, the town centre may benefit from more greenery.

4.60 Lastly, the heritage elements of the town centre contribute to the historic feel, with old sign posts, mosaic in the pavement, the Literary Institute and coat of arms, and the crests in the pavement all providing interesting and important characteristics to the town centre. There is a monument in the middle of the town, which celebrates Egham as the historic site where the Magna Carta was sealed in 1215.

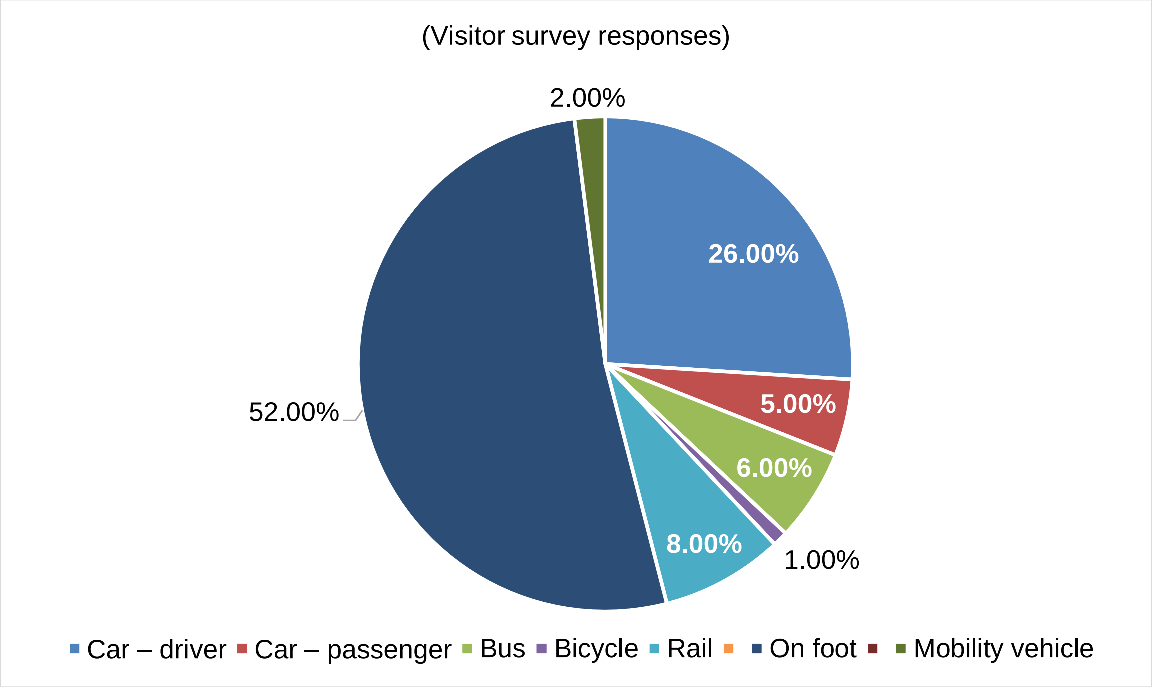
## Customer Perception of Egham Town Centre

4.61 The perception of the town centre from a customer viewpoint was obtained from the household telephone interview survey (HTIS), described in more detail in Section 5, and also an in-centre shopper survey conducted in January 2022. The surveys focused on what people like and dislike about Egham Town Centre and improvements that would likely encourage them to frequent the town more. The full results can be viewed in Appendix D.

4.62 The following provides a summary of the key findings on the overall perception of Egham Town Centre based on all responses from the in-centre survey and total study area responses from the household survey.

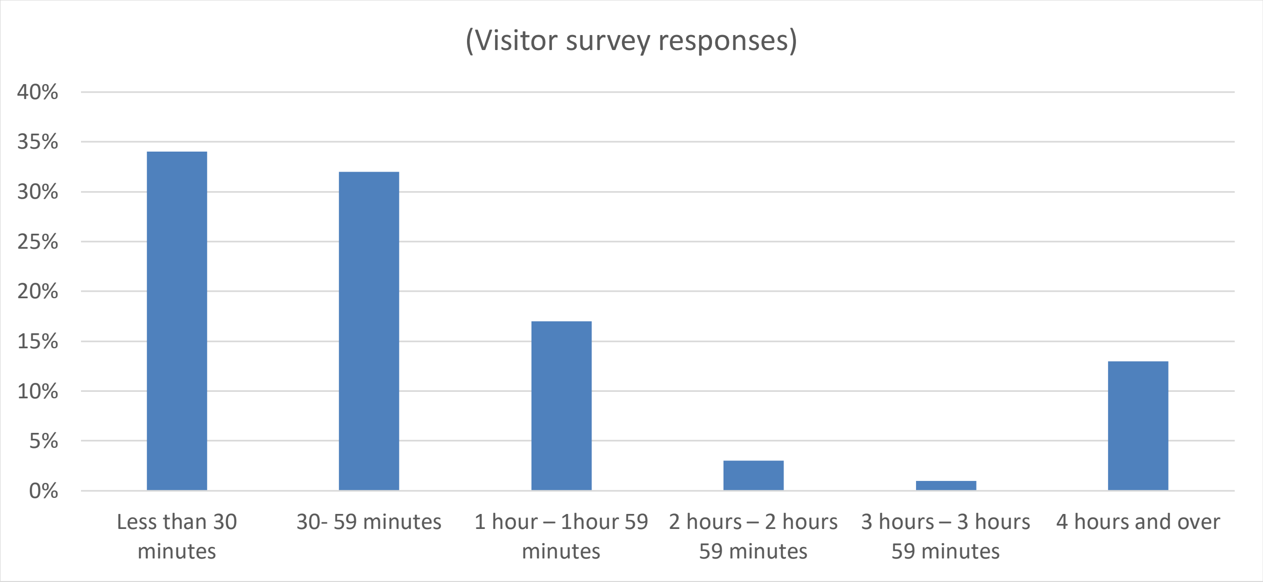
4.63 **Preferred travel mode** – the majority of visitor survey respondents visited the town centre by foot (52%) and car travel (drivers) being the second most popular mode of travel (26%).

**Figure 4.7: How did you travel to Egham today?**



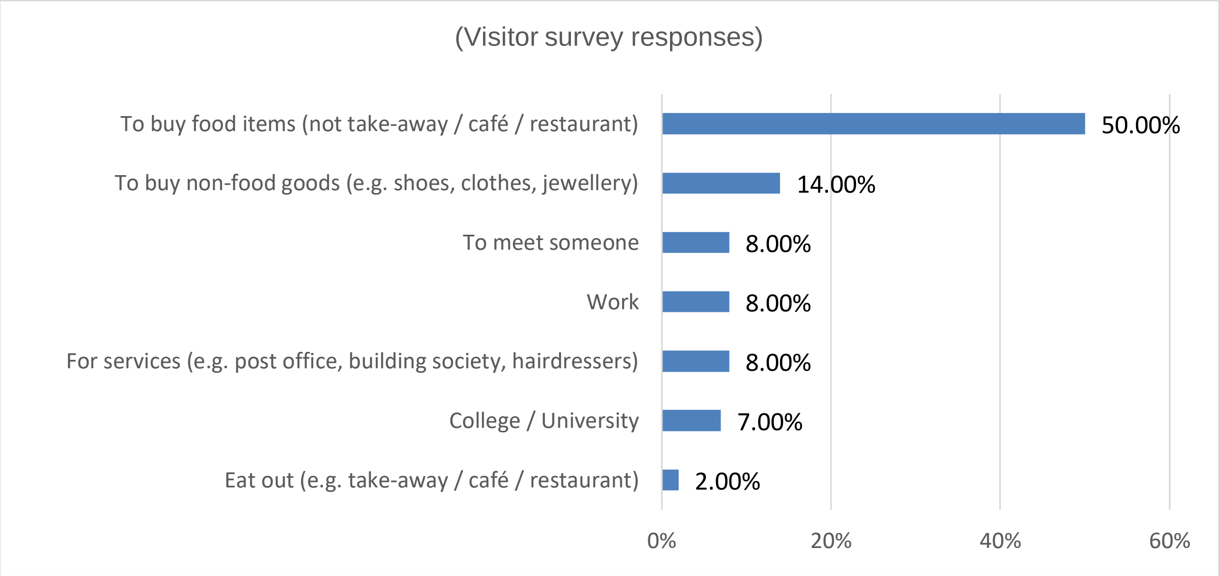

4.64 **Length of stay** – most people who visited Egham town centre did not intend to stay for more than an hour, which highlights the opportunity to increase dwell time.

**Figure 4.8: How long do you intend to stay in Egham today?**



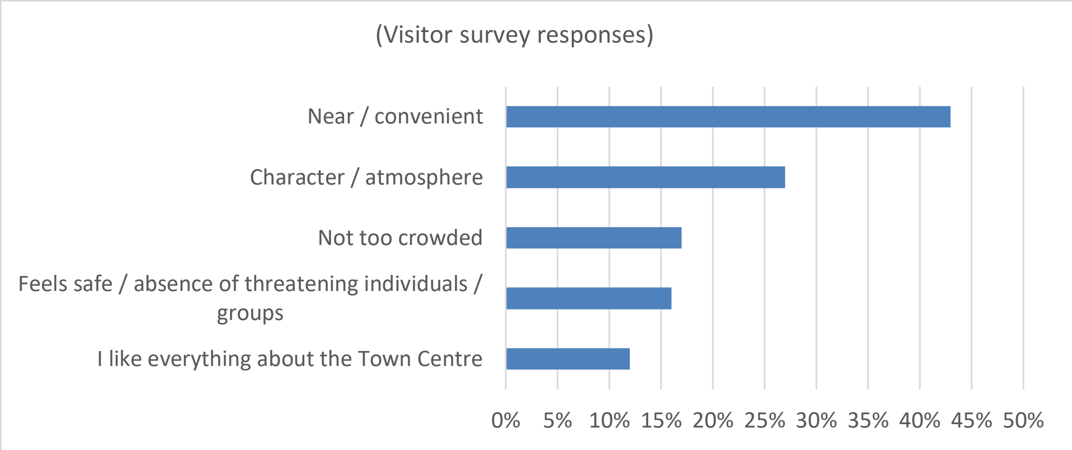

4.65 **Reason for visit** – half of all respondent's main reason to visit the town centre was to purchase food items (groceries), and purchasing non-food items the second reason, although representing less than 15%. This emphasises how the Tesco and Waitrose stores are the key retail anchors and attract the majority of local visitors.

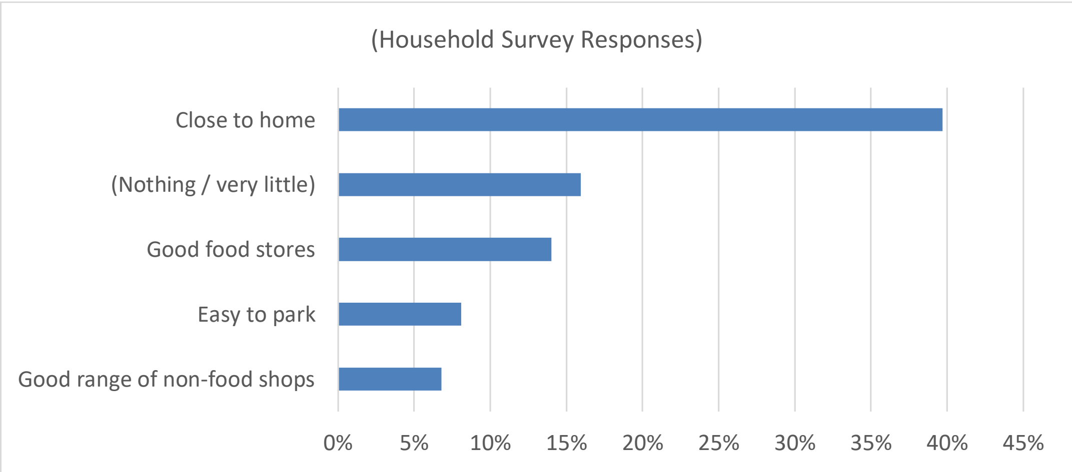
**Figure 4.9: What is your main reason for visiting Egham today?**




4.66 **What is liked most about Egham** – Respondents felt strongly about liking the town centre because it is near and convenient. Although, the other responses were also very positive, with respondents liking the character, feeling safe and over 10% liking everything about the town centre. However, the householder surveys reflected that over 15% of respondents liked "very little" about the town centre. With the town being so steeped in heritage and elements being tangible throughout the town centre, the survey emphasises that visitors feel is important and appreciated.

**Figure 4.10: What do you like most about Egham Town Centre?**

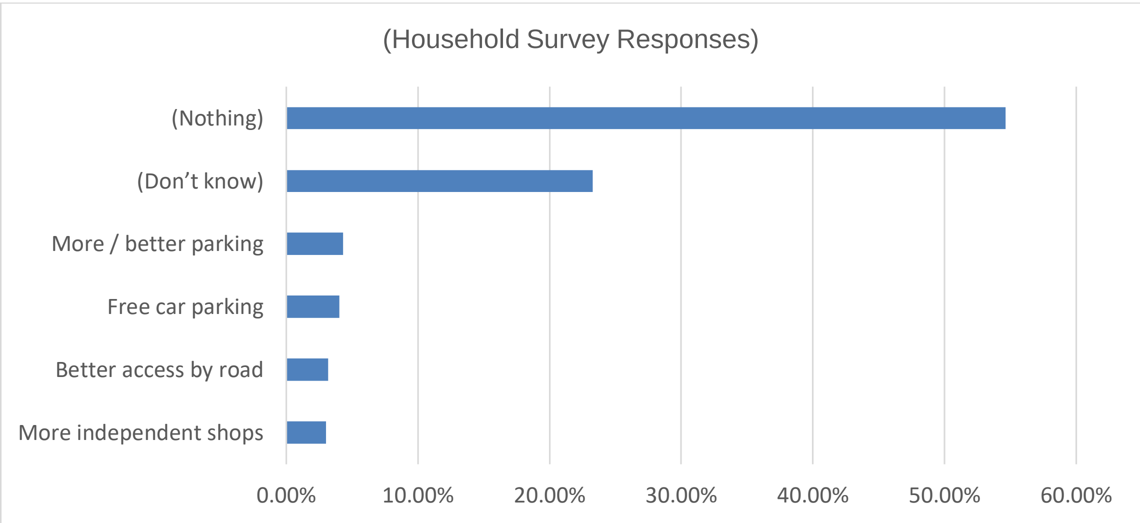


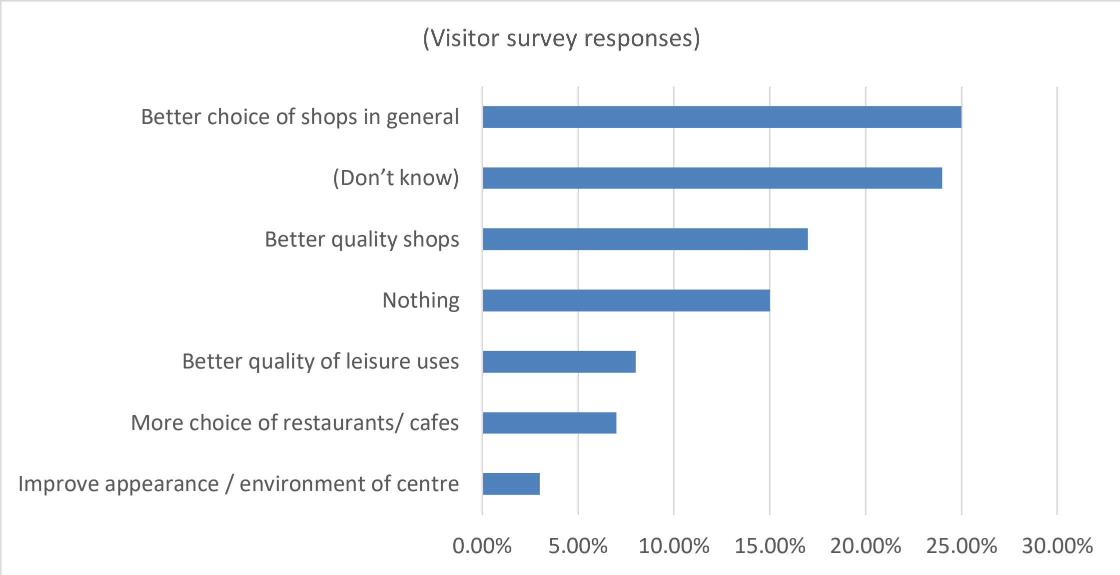

Note: Responses from respondents living in Zones 3

4.67 **What improvements are needed to encourage more trips** – the householder surveys demonstrated that respondents were satisfied with the current town or less opinionated about how to make the town better by responding with "nothing" or that they were uncertain how to better the centre, stating "don't know". The other responses were mostly in relation to car parking. The visitor surveys provided something different with the majority of responses relating to better choices and quality of retailing outlets.

**Figure 4.11: What improvements would encourage you to visit Egham more often?**



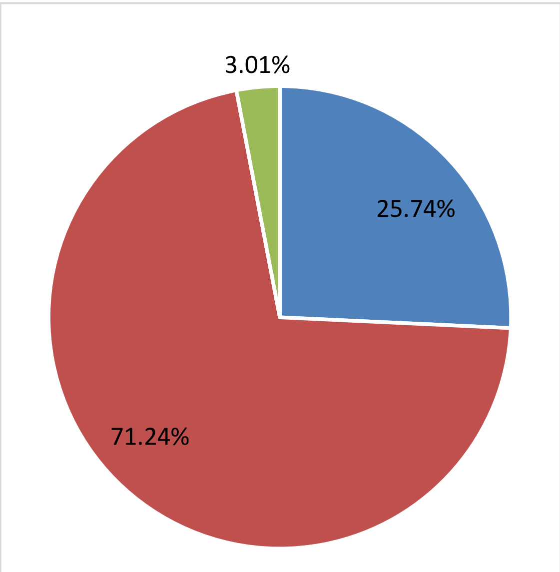

Note: Responses from respondents living in Zone 3



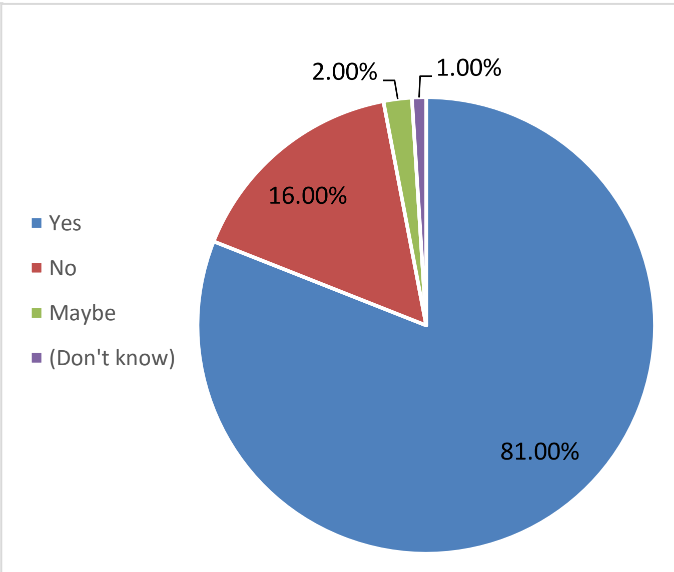

4.68 **Street markets** – respondents to the visitor survey were asked what kind of events would encourage them to visit the town more often with almost all respondents stating a market. The respondents were then probed whether a regular street market would encourage respondents to visit the town centre more often, respondents to both surveys were strikingly different, the householder surveys predominantly responding "no" and the visitor surveys stating "yes".

**Figure 4.12: Would the introduction of an improved and regular street market encourage you to visit Egham more often?**

Household Survey Responses




Visitor Survey Responses



## Summary

4.69 In summary, we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Egham Town Centre below:

**Strengths**

Egham has a strong convenience core, which includes a variety of offers, from Tesco, Waitrose (which is considered a premium offering) and Iceland.

Universities and colleges in and close to the town centre support a strong student population, which adds to the town's vibrancy. Crucially, the student population will generate trade for town centre businesses, especially during lunch time hours and the evening economy.

A rich history with the sealing of the Magna Carta being one of the key heritage links, but also the mix and range of architecture from different time periods add to the character of the town centre.

The recent Magna Square regeneration scheme will bring additional students, residential units and commercial outlets.

A steady retail market with strong prime rents and vacant retail units being re-occupied quickly. In addition, secondary positions are obtaining rents around £56 per sq ft, still much higher than Chertsey's primary locations, showing investor interest in the area. Lettings are gaining multiple offers throughout the town centre, which demonstrates healthy competition.

Several large firms are located in and around Egham such as Belron International, Enterprise Holdings Ltd etc. Employees are likely to support daytime trade for businesses in the town centre.

Two-thirds of retailing representation is independent businesses and the town is anchored by well-established multiples.

The town is old and, although dated in parts, is in relatively good condition.

Well connected in terms of rail links, the station located very close to the town centre and the M25 is located very close to the town centre.

The high street has a spacious pedestrian environment and is generally good for mobility. The speed restrictions and the pedestrian zone contribute to this environment.

There is further demand from the foodstore market with Lidl and Aldi actively seeking a site in the town centre.

Egham has a good supply of car parking and within easy walking distance of shopping streets.

**Weaknesses**

The comparison retail offering will likely never be as strong as the surrounding towns/cities and there has been a steady decrease in comparison retail outlets since 2017.

Parts of the town centre look outdated and are in need of redevelopment

The town is overly saturated with 'Hairdressing, Health and Beauty' services.

The surveys found that there is currently a lack of dwell time in the town centre with most visitors wanting to stay only for an hour or less.

No retail representation in discount and surplus stores, florists and garden, sports and toys.

As for Chertsey, Egham does not support a regular street market. Feedback from the visitor survey indicated strong support for a regular street market, which should be easily accommodated within the town's pedestrian area. This could come in the form of a monthly food market or farmers' market that could increase in frequency to a weekly market if there is sufficient customer demand.

Commercial units in the town centre are mostly made up of unmodernised units and units converted within historic buildings. This is likely to limit the scope for attracting high street multiples.

**Opportunities**

The high street could be more of a shared surface environment, as it would be well suited for this due to the pedestrian zone already limiting the amount of car use. Shared surfaces give priority to pedestrians and acts as an effective traffic calming measure.

The steps on the high street currently lead to mostly vacant retail units which lends itself to opportunity of repurposing them for residential.

The area around the Magna Carta Monument is well suited for a square.

A lot of the town centre looks out dated and could be redeveloped to freshen up the town centre, adding colour, lighting, greenery etc.

Given the town's strong student population there are likely to be opportunities to support emerging retail and leisure formats that particularly appeal to students and young people. This could include pop-up retail and leisure, maker markets and indoor food halls, and active leisure uses.

The Magna Square development will add a lot to the town centre and could draw in more visitors if what is offered is different / unique.

The cafes and restaurants could provide more outside dining / café culture, this would contribute to active frontages and add to the vibrancy of the high street.

Investment in public realm and building frontages will create a more attractive environment. This will require buy-in from freeholders and leaseholders to invest and maintain their property.

Creating more greenspace in the heart of the town centre will encourage more people to visit the town centre and promote linked trips to commercial facilities. The area around the monuments on High Street presents a good opportunity to create an urban green space, which could come in the form of parklets This form of urban greening is suited to town centres where there is not scope to create permanent green spaces.

The opening of a cinema in town centre as part of the Egham Gateway West scheme will help to boost the town's evening time economy and the town's leisure offer.

Market research shows very strong support for a regular street market albeit from current town centre users.

**Threats**

The town is competing with other, larger, town centres which offer more than Egham, in particular with regards to comparison retail. This would draw people out of the town to look for better retail offerings and potentially have a knock on effect for other retailing classes.

Despite Egham having a greater choice of retail offer compared to Addlestone and Egham, the market research findings found that Egham's town centre users and catchment residents are not satisfied with current retail provision in the town centre. Given Egham's proximity to higher order centres such as Staines there is a threat that without investment in the town centre's retail offer that further expenditure will be lost to competing locations.

Online shopping presents the biggest threat to the town centres and represents stronger competition than competing centres outside of the Borough for non-food goods in particular.

The introduction of use Class E could lead to the loss of the town's occupied retail and leisure units, which could have a significant impact on the town's ability to attract shoppers. This is some concern that certain personal service operators may proliferate street frontages (e.g. nail bars, tanning salons) which would impact on the investment potential of the town centre, particularly the ability to attract better quality commercial operators.

The potential impact of new Permitted Development Rights (PDR) allowing changes from use Class E (including shops and offices) to residential (Class C3) outside of planning controls. The loss of office space could be a weakness, particularly where conversions have resulted in viable office space being repurposed for higher value residential use. It is recognised that new residential communities bring opportunities for new spend within the town centre. However, to achieve this town centre offer needs to meet this new demand, otherwise expenditure will be lost to competing locations.

4.70 In summary, Egham is considered to be a vital and viable town centre. Based on the health check evidence the town is the best performing of the Borough’s three main centres, owing to a better representation in retail offer and other town centre uses, but particularly due to the level of investment that is ongoing in the town centre. Feedback from commercial agents also indicate good demand from commercial tenants, which is helped by strong town centre footfall from shoppers and the daytime student population.

# 5. AUDIT OF LOCAL CENTRES

5.1 This section sets out the key findings of the high level audit carried out for the Borough's four Local Centres.

## ENGLEFIELD GREEN

5.2 Englefield Green is a small local centre located approximately 1.5 miles west of Egham Town Centre. The centre's boundary includes residential and commercial buildings along Victoria Street (west of the junction with Albert Road) and St John's Road as shown in the figure below.

**Figure 5.1: Local Centre Boundary and Primary Shopping Area for Englefield Green Local Centre**


5.3 The local centre attracts a small market share in Study Area and Primary Catchment Area convenience goods top-up shopping expenditure, which is identified for the Spar and other convenience retailers. The centre's catchment reach is limited to surrounding residential communities in the centre's home zone (Zone 3).

### *Diversity of Uses*

5.4 Commercial activity in the local centre is split between two locations – St John's Road and Victoria Street. The two areas are separated by residential uses. Overall, the centre's mix of uses is geared towards personal and professional service businesses, but with a notable number of food and beverage outlets, including four restaurants and two public houses. The centre has a small amount of convenience retail including a Spar convenience store and a small independent supermarket (Smith's) on St John's Road, supported by other forms of convenience retail offer, such as off licences and newsagents, and characterised by independent shops. There are no national multiples within the local centre, other than Spar, which acts as the key anchor retailer. The centre has a number of local independent convenience stores, including a butcher, and off license.

### *Townscape and Environment*

5.5 Englefield Green is an attractive small centre with a good standard in environmental quality. There has been evidence of investment, mainly focused on Victoria Street, which has led to the redevelopment of buildings that have improved the streetscape. There are further opportunities to enhance Victoria Street through the redevelopment of the vacant site between numbers 8 and 12 and introducing soft landscaping to the street frontage of The Armstrong Gun and its car park.

5.6 Local centre units are well maintained and investment is evident in shop frontages, which are broadly uniform and add to the appeal of the local centre.

## WOODHAM & NEW HAW

5.7 Woodham and New Haw are located alongside each other and are situated to the very south of the Borough's administrative area and in close proximity to West Byfleet in Woking.

5.8 The defined local centre is focused on New Haw, which is set around The Broadway; a small, compact, and attractive tree lined boulevard. The style of architecture suggests that the local centre was built at the same time as many of the surrounding residential streets. A parade of commercial units is also located along Woodham Lane which mainly accommodates service and food and beverage uses.

**Figure 5.2: Local Centre Boundary and Primary Shopping Area for Woodham/ New Haw Local Centre**


5.9 Of the Borough's four local centres, New Haw generated the highest proportion of convenience goods expenditure, which was primarily generated from top-up shopping. New Haw is mainly drawing trade from the surrounding residential communities in Zone 6, but is also drawing some trade from those living in Zone 8.

### *Diversity of Uses*

5.10 New Haw has a good mix of commercial and public services for a centre of its size. A small Co-operative foodstore is the main retail anchor and supported by other convenience retailers such as a small grocery store (Premier Express), a newsagent/ general goods store, and butcher/deli. The centre has a small offering of comparison retail albeit primarily comprising bulky goods retailers related to hardware, flooring and tiles, auto parts, bathroom furniture products. The centre also has a music shop, two florists, pet shop, and a charity shop (RSPCA). Service uses include two hair salons, a barber, dry cleaners, and estate agent. Non-commercial uses of note include a community library.

5.11 In terms of leisure uses, the town centre has a number of food and beverage outlets including two restaurants, three hot food takeaways, and a public house.

### *Townscape and Environment*

5.12 As highlighted before, New Haw has an attractive streetscape aided by the presence of mature trees that line each side of the central carriageway along The Broadway. Frontages are reasonably well maintained and there is evidence that some units have invested recently in shop front refurbishment. A small number of shops would benefit from shop front improvements, particularly those that have applied vinyl adverts across window fronts (e.g. Premier and Co-operative), which do not give the sense of an active frontage.

The planters that sit along the central tree line reservations would benefit from new planting; a project that could be linked with local schools and promote biodiversity.

### *Summary*

5.13 New Haw/ Woodham appears to be trading well with no vacant units identified. The Co-operative store is a key anchor and the household survey findings indicate that the store serves an important top-up shopping function for surrounding residential communities. The centre provides a good mix of retail and service uses for a centre of its size. The presence of bulky goods retailers and a community library are key benefits, as it will help draw a broader mix of town centre users. Overall, the centre appears to be performing in its role as a convenience and service centre for the surrounding local population. Future investment should be directed to replanting along The Broadway and maintaining the mature trees, which are a visual asset to the centre.

## OTTERSHAW

5.14 Ottershaw is located to the west of the Borough and less than 2 miles from the western edge of Addlestone Town Centre. The settlement sits within a relatively semi-rural area of the Borough.

5.15 The defined local centre broadly comprises commercial outlets along Brox Road. The style of architecture suggests that part of the local centre was built at the same time as many of the surrounding residential streets with later additions at 2-8a Brox Road.

**Figure 5.3: Local Centre Boundary and Primary Shopping Area for Ottershaw Local Centre**


5.16 The centre does not attract a strong market share in terms of retail and leisure expenditure due to its size. For example, the centre attracts a total market share of 0.5% of total Study Area convenience goods expenditure, increasing to 1.1% for the PCA. However, the centre is a popular destination for top-up shopping, particularly with residents in its constituent zone (Zone 5) where it attracts a top-up shopping convenience goods market share of between 23% and 67.6%.

### *Diversity of Uses*

5.17 Ottershaw has a small commercial offer, which is limited includes two convenience stores (Londis and One Stop), a pharmacy (Lloyds), a public house/restaurant, a takeaway, an estate agent, and two hair salons. A post office is located within the One Stop store. The centre also has a dental practice, village hall and a social club.

### *Townscape and Environment*

5.18 The centre has a pleasant environment with a village character. The commercial terrace on Brox Road that includes the Londis store is somewhat dated in terms of its aesthetic and the building frontage would benefit from refurbishment. This area would also benefit from soft landscaping, ideally the introduction of trees or at the very least planters.

### *Summary*

5.19 Ottershaw is a small local centre but has a good mix of essential commercial uses that meets the day-to-day needs of the centre's immediate population. This is reflected in the household survey findings, which shows that the centre is supporting a top-up shopping food function. Notably, the centre is a popular top-up convenience goods shopping destination for residents living in Zone 5.

5.20 Overall, the centre appears to be performing in its role as a day-to-day convenience centre for the surrounding local population. Opportunities for investment should focus on upgrading the retail parade on Brox Road and introducing soft landscaping in the forecourt area.

## VIRGINIA WATER

5.21 Virginia Water Local Centre is situated broadly between Egham and Chertsey. The centre is served by a train station that provides good links to London. As a result, the settlement is popular with commuters.

5.22 As the figure below shows, the centre is formed by two separate commercial areas along Station Approach. Both commercial areas are linked to Christchurch Road, which provides good connections to the wider road network, including the M25 and A30.

**Figure 5.4: Local Centre Boundary and Primary Shopping Area for Virginia Water Local Centre**


5.23 In terms of catchment, the household survey findings reveal that Virginia Water attracts a Study Area market share of 0.8% of total Study Area expenditure, increasing to 1.7% for the PCA. Within its constituent zone (Zone 7), the centre attracts a reasonably strong market share of 17.1% for all convenience goods expenditure. The centre generates a negligible market share in comparison goods expenditure, which reflects the limited comparison offer in the centre.

### *Diversity of Uses*

5.24 The mix of uses in Virginia Water is distributed across the two commercial parades. The commercial parade to the west of the centre includes a broad mix of uses, including convenience stores, estate agents, hair salons, homewares store, bakery, pet shop, and restaurants. This commercial pitch is best described as higher quality as reflected in the brands that are present (e.g. Toni and Guy and Knight Frank). The commercial parade to the east of the centre, which is located next to the train station, includes more mainstream retail, food and beverage, and service offer. It includes a convenience store, dry cleaners, hair salon, two restaurants, a coffee shop, and a post office.  The centre also benefits from a library and parking provision appears to be good at both commercial areas, particularly close to the station.

### *Townscape and Environment*

5.25 The quality of environment is good across Virginia Water. The recent development next to the train station has introduced modern and attractive architecture that has improved the shopping environment for this area of the centre. Other buildings within the commercial area next to the station are dated in respect to the architecture. However, the buildings, shop frontage, and streets appear to be well maintained. This commercial area could be improved by introducing soft landscaping, particularly trees which would break up the frontage, or alternatively planters. The quality of environment in the commercial area to the west of the centre is also well maintained and offers a very different streetscape, particularly in terms of the style of architecture.

### *Summary*

5.26 Virginia Water stands out from the other local centres in the Borough in terms of its size and the range of retail, service and food and beverage offer.  The settlement is popular with commuters working in London and the quality of commercial uses indicates an affluent surrounding catchment area. However, despite the strong retail offer the centre does not command as high a retail market share as other local centres in the Borough, such as New Haw/ Woodham.

5.27 This is reflected in the household survey findings, which shows that the town is supporting a top-up shopping food function. Notably, the centre is a popular top-up convenience goods shopping destination for residents living in Zone 5.

5.28 Overall, the centre appears to be performing in its role as a day-to-day convenience centre for the surrounding local population. Opportunities for investment should focus on introducing soft landscaping in the commercial area.

## SUMMARY

5.29 In summary, the Borough's four Local Centres (Englefield Green, New Haw/Woodham, Ottershaw, and Virginia Water), along with the Borough's smaller neighbourhood centres support the day to day retail and service needs of their local populations. The market share analysis in Section 5 (Study Area and Market Share Analysis) in Volume A of this report shows that the local centres attract very limited expenditure from residents in the Borough beyond their immediate resident catchments. This reflects the nature of these centres, which is to predominately serve the day-to-day needs of their immediate local catchments. For most of the centres, commercial uses are limited to convenience retail offer, some service offer and basic food and beverage offer (e.g. fast food/ takeaways and cafes).

# 6. OUT OF CENTRE RETAIL PROVISION

6.1 The following provides a brief overview on Edge and Out of Centre retail and leisure developments in the Borough.

6.2 The Borough has limited out of centre retail and leisure offer and is located around the Causeway business park area. The retail park is located just within the Borough boundary and in close proximity to Two Rivers Retail Park, from where it is likely to generate linked trade. The Causeway has a number of anchor retailers including a large Homebase with an instore Halfords and Bathstore. Close by is a Wickes store and a Sainsbury's Superstore and ancillary petrol filling station.

6.3 The Causeway retail area currently achieves a market share of 2.1% of total study area comparison goods expenditure (including SFT), while the Sainsbury's attracts a study area market share of 7.8%. Causeway is particularly popular with respondents living in Zone 3 (Egham) where it draws a higher market share for both convenience and comparison out of the ten study zones.

6.4 Other out of centre retail provision in the Borough comprises quasi trade counter/retailers (e.g. Screwfix, Travis Perkins, etc.), farm shops, and petrol filling station convenience stores, which generate a minimum level of retail expenditure from residents in the Borough.