1 BACKGROUND

1.1 The Government's policies for Planning for Sustainable Economic Development are set out in Planning Policy Statement 4 (PPS4)\(^1\).

1.2 PPS4 requires local planning authorities to keep the following matters under review:

a) the network and hierarchy of centres  
b) the need for further development and  
c) the vitality and viability of centres

1.3 Councils should measure the vitality and viability and monitor the health of their town centres over time to inform judgements about the impact of policies. They should also regularly collect market information and economic data, preferably in co-operation with the private sector, on the key indicators (listed in Section 3 below). In accordance with PPS4, from 2010, Guildford Town Centre Health Checks are now included in Annual Monitoring Reports.

1.4 Councils should also assess the retail and leisure capacity/need and the potential of the area to accommodate new development. They should identify centres in decline, those that could be extended, and those where change needs to be managed.

1.5 Guildford Town Centre Vitality and Viability Report produced in 2008 forms the baseline for measuring changes in vitality and viability of the borough's hierarchy of centres each year.

1.6 Town centre surveys are undertaken by the Council’s Planning Policy service annually in early summer. The use of each ground floor unit (all floors in internal shopping centres) is classified by their Use Class\(^2\), with most town centre uses falling into one of the following classes.

- **A1** - Shops  
- **A2** - Financial and professional services e.g. banks, building societies, estate agents  
- **A3** - Restaurant and cafés  
- **A4** - Drinking establishments e.g. public houses, wine bars  
- **A5** - Hot food take away  
- **B1** - Business e.g. offices other than in a use within Class A2  
- **C1** - Hotel  
- **C2** - Residential institutions e.g. hospitals, nursing homes  
- **C3** - Dwelling house  
- **D1** - Non-Residential Institutions e.g. medical and health services - clinics and health centres. Museums, public libraries, art galleries, non-residential education, church halls  
- **D2** - Assembly and leisure e.g. cinemas, indoor and outdoor sports and leisure  
- **Sui Generis** - In a class of its own e.g. launderettes, petrol filling stations, theatres, selling and

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\(^1\) DCLG (December 2009)  
\(^2\) Town and Country Planning (Use Class) Order 1987 (as amended)
displaying of motor vehicles.

2 RETAIL NEED

2.1 During the last year, the need/capacity for further retail floorspace up to 2026 was considered by the Guildford Borough Retail and Leisure Study\(^3\). Due to the uncertainty over longer term forecasts, more weight is afforded to retail need to 2021, and caution is advised over relying too heavily of the more indicative growth to 2026.

2.2 The results (cumulative) are summarised in Table 1:

<table>
<thead>
<tr>
<th>Year</th>
<th>Comparison goods (m(^2) gross)*</th>
<th>Convenience goods (m(^2) gross)*</th>
<th>A3-A5 (m(^2) gross)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016 (without overtrading)</td>
<td>3,700</td>
<td>-4,600</td>
<td>2,400</td>
</tr>
<tr>
<td>2016 (with overtrading)</td>
<td>-</td>
<td>5,700</td>
<td>-</td>
</tr>
<tr>
<td>2021 (without overtrading)</td>
<td>36,200</td>
<td>-3,500</td>
<td>4,500</td>
</tr>
<tr>
<td>2021 (with overtrading)</td>
<td>-</td>
<td>6,700</td>
<td>-</td>
</tr>
<tr>
<td>2026 (without overtrading)</td>
<td>73,300</td>
<td>-2,100</td>
<td>6,800</td>
</tr>
<tr>
<td>2026 (with overtrading year)</td>
<td>-</td>
<td>7,900</td>
<td>-</td>
</tr>
</tbody>
</table>

* this capacity excludes the existing commitments of the extant planning permissions at the Friary extension site (approximately 21,000sqm gross comparison and approximately 5,000sqm gross convenience floorspace), and B&Q at Ladymead Retail Park (approximately 3,500sqm comparison).

Table 1: Retail need in Guildford Borough

2.3 The Retail and Leisure Study found the quantitative need of comparison goods to be fairly limited to 2016 assuming that the approved Friary extension scheme is implemented and claims a large amount of the expenditure growth to 2016. However, the Study acknowledges that the Friary extension scheme is unlikely to proceed in its current form. Should this permission lapse unimplemented, there would be a significantly greater (a further 21,000m\(^2\)) quantitative need in the short term to 2016 (the date by which the study assumes the commitments will be trading). Assuming that the Friary extension permission is not implemented in its currently approved form, comparison need would be 24,700m\(^2\) to 2016, 57,200 m\(^2\) to 2016, and 94,300 m\(^2\) (cumulative). Due to difficulties in defining exactly what compromises bulky goods, and lack of guidance on this, bulky goods need is included within comparison need figures.

2.4 The existing floorspace in Guildford Town Centre is generally achieving a very high turnover per sqm compared to acknowledged benchmarks for comparison floorspace. This relatively high sales density indicates that there is existing pent up demand. This is likely to be due to the high

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\(^3\) Roger Tym & Partners, Retail and Leisure Study (May 2011)
level of comparison expenditure growth experienced between 1992 and 2008 which has not been matched by significant new floorspace being developed in the town during that period. Whilst convenience need has been presented both without and with overtrading, no overtrading has been accounted for in the above need figures. This is potentially a further source of capacity that could justify additional floorspace in the Town Centre above the reported comparison need.

2.5 The Study recommends that the Council actively consider how the Friary extension development will proceed, including the possibility of considering a redesigned scheme to meet at least a similar scale of floorspace as in the existing permission in order to meet the needs to 2016 and 2021.

2.6 Existing convenience floorspace is trading very successfully, with the out-of-town Tesco and Sainsbury's trading significantly in excess of their company average (average sales density per sqm). Convenience need to 2026 has been calculated both with, and without this overtrading. The figures without overtrading show a negative output (no quantitative need), whilst the outputs with overtrading show a quantitative need for additional floorspace. Assuming that the Friary extension is not implemented in its current form, and current overtrading is taken into account, there is some 10,700sqm gross convenience need to 2016, 11,700sqm to 2021 and 12,900sqm to 2026 (cumulative).

2.7 Given the scale of overtrading observed in the superstores, the Study considers that Guildford Town Centre would benefit from the provision of a new food supermarket or superstore in the town centre to relieve overtrading, improve consumer choice and increase linked trips spending.

2.8 The quantitative need outputs from the assessment study should not preclude new development coming forward that either exceeds these estimates or that opens earlier in the period to 2026 if they would maintain or enhance a more localised market share and improve consumer choice, subject to compliance with development control policies. In a do nothing scenario, centres will decline and over time will lose market share to competing developments as consumers seek enhanced choice and retailers seek improved accommodation.

2.9 The Study makes a number of conclusions and recommendations. It advises that the consequence of not delivering a substantial quantum of comparison floorspace over the next ten years, ideally at the Friary extension site, is that there will be more reliance on edge and/or out of centre sites, and potentially the town centre could lose market share as competing developments come on stream. The Council should therefore take active steps to bring forward improved retail floorspace in the town to maintain Guildford Town Centre’s position in the retail hierarchy.
TOWN CENTRE HEALTH CHECK INDICATORS

PPS4 includes a list of indicators to monitor:

I. Diversity of main Town Centre uses (by number, type and amount of floorspace): the amount of space in use for different functions – such as offices; shopping; leisure, cultural and entertainment activities; pubs, cafes and restaurants; and, hotels.

II. The amount of retail, leisure and office floorspace in edge-of-centre and out-of centre locations.

III. The potential capacity for growth or change of centres in the network: opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of Town Centre development.

IV. Retailer representation and intentions to change representation: existence and changes in representation of types of retailer, including street markets, and the demand of retailers wanting to come into the centre, or to change their representation in the centre, or to reduce or close their representation.

V. Shopping rents: pattern of movement in Zone A rents within primary shopping areas (i.e. the rental value for the first six metres depth of floorspace in retail units from the shop window).

VI. Proportion of vacant street level property and the length of time properties have been vacant: vacancies can arise even in the strongest Town Centres, and this indicator must be used with care. Vacancies in secondary frontages and changes to other uses will also be useful indicators.

VII. Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental): demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments. This indicator should be used with care.

VIII. Land values and the length of time key sites have remained undeveloped: data on changes in land value and how long key Town Centre and edge of centre sites have remained undeveloped provide important indicators for how flexible policies should be framed and can help inform planning decisions.

IX. Pedestrian flows (footfall): a key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening, who are available for businesses to attract into shops, restaurants or other facilities.

X. Accessibility: ease and convenience of access by a choice of means of travel, including – the quality, quantity and type of car parking; the frequency and quality of public transport services and the range of customer origins served; and, the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions.

XI. Customer and residents’ views and behaviour: regular surveys will help authorities in monitoring and evaluating the effectiveness of Town Centre improvements and in setting further priorities. Interviews in the Town Centre and at home can be used to establish views of both users and non-users of the centre, including the views of residents living in or close to the centre. This information could also establish the degree of linked trips.

XII. Perception of safety and occurrence of crime: should include views and information on safety and security, including from the threat of terrorism, and where appropriate, information for monitoring the evening and night-time economy.

XIII. State of the Town Centre environmental quality: should include information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces).
2.10 The 2008 Report provided a baseline against which to assess changes within the Town Centre. 534 units were recorded in the Town Centre designated frontage this year (May 2011). This compares to 528 units recorded in the GOAD Centre Report, August 2010. Total retail floorspace in the town centre in August 2010 was 1,059,700 ft², compared with 1,051,000 ft² in 2005, an increase of 8,700 ft².  

2.11 This year’s town, district and local centre surveys were undertaken in May 2011 by the Council’s Planning Policy service. These surveys represent a snapshot in time, with the exception of vacancies in Guildford town centre, which are surveyed monthly.

**Figure 1: Guildford Town Centre designated shopping frontages**

The shopping frontage consists of primary, secondary, tertiary and specialist shopping frontages within the Town Centre as allocated in the Local Plan 2003. The primary, secondary, tertiary and specialist shopping areas are shown in the Local Plan 2003 Guildford Town Centre Proposal Map.

2.12 The Primary Shopping Frontage is the area along the south-western end of the High Street where the main cluster of national multiple stores are located. This area is characterised by the highest proportion of A1 (shop) uses, the highest Zone A rental values (rental value for the first six metres depth from the shop window), and predominantly the highest pedestrian flow levels.

2.13 The Secondary Shopping Frontage directly adjoins the primary frontage, mainly to its north. It provides locations for a greater diversity of uses, so performing an important function within the Town Centre. Its lower rental levels and footfall compared to Zone 1 enable a wider range of

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4 GOAD Centre reports October 2005 and August 2010
shops to locate here, as well as other supporting A-class uses. The primary and secondary shopping frontages form the Primary Shopping Area.

2.14 The Tertiary Shopping Frontage is where greater flexibility of uses can be permitted without harming the shopping character, vitality and viability of the town centre. This Tertiary frontage, does not form part of the primary shopping area, provides a range of uses that are a vital part of the functioning of the Town Centre. These streets also provide important pedestrian links to and from the more centrally located shopping areas within the Town Centre and the surrounding residential areas.

2.15 The Specialist Shopping Frontage is centred on three streets (Chapel Street, Castle Street, and Phoenix Court) where it is appropriate to permit a higher proportion of food and drink (Class A3) uses. These uses play an important role in enhancing the Town Centre's evening economy.

2.16 The Council is working with partners to progress a potential Business Improvement District (BID) for Guildford Town Centre. A consultant has recently been appointed to progress a potential BID, and is drawing up a questionnaire and the defined area in which the referendum of town centre businesses will be held in June 2012. Should the businesses within this area (likely to be a smaller area than the whole town centre) vote to establish a BID, a levy would be charged to all qualifying businesses within the area. These monies would be used to improve the town centre, potentially including increased security, environmental improvements, and marketing. The partnership would draw up a business plan to decide on priorities for the BID monies. For further details see the report (Item 6) at http://www.guildford.gov.uk/article/6179/Executive---25-November-2010.

2.17 The mixed-use redevelopment of the land around Guildford Railway Station moved closer this year with initial public engagement on principles held in March 2011. Solum Regeneration is a partnership between Network Rail and Kier Property, a company to regenerate Guildford, and other railway stations in the South East. Further public consultation may be held in late 2011/early 2012, before submitting a planning application at a later stage. More details and a summary of the early consultation http://www.solumregeneration.co.uk/guildford.html.
I. Diversity of main Town Centre uses (by number, type and amount of floorspace): the amount of space in use for different functions – such as offices; shopping; leisure, cultural and entertainment activities; pubs, cafes and restaurants; and, hotels.

![Town Centre designated frontage](image)

**Figure 2:** Guildford Town Centre designated frontage uses by number of units

2.18 The Town Centre designated frontage is 59 percent A1 retail use. This is a reduction of four percent from 2010. This is predominantly due to the internal redevelopment of the Friary Shopping Centre, and the high level of vacancy produced by this. For more detail on vacancy rates in the town centre, see Section VI.

2.19 Although the overall vacancy rate has increased since 2008, this is not unexpected in an economic downturn. Despite the downturn, many new stores and restaurants opened in Guildford Town Centre in 2009 and 2010, increasing its attractiveness as a retail destination.

2.20 New shops to Guildford High Street between the May 2010 and 2011 surveys include top end stores such as Kurt Geiger in the Friary Centre, and Hugo Boss and Calvin Klein on the High Street. Other stores opening between May 2010 and May 2011 included Primark in the Friary Centre, Mark Jonsson shoes in Tunsgate Square, and Pandora and Whitleys jewellers both on the High Street. Cargo furniture store took a unit at White Lion Walk, and several children’s clothing shops opened.

2.21 New restaurants include the Gourmet Burger Kitchen on Friary Street, and Cau at the top of High Street. KOKO hairdressers moved into Tunsgate when the Tourist Information Office moved to
the High Street. Closures included British Bookshops and Stationers on North Street, and Habitat in the High Street due to almost all the stores nationally being put into administration.

**Primary Frontage**

![Primary frontage comparison chart](chart.png)

**Figure 3:** Use classes within the primary frontage

2.22 67 units were recorded in the primary shopping frontage. Figure 3 shows a comparison between 2011, 2010 and 2008. There has been a decrease in the number of A1 units since 2008. This is mainly due the increase in vacant units from none to six percent (four units) in the primary frontage that were previously in A1 use.

2.23 In accordance with national policy, primary frontages should contain a high proportion of retail uses. Local Plan Policy S4 protects the retail function of this area by not permitting changes of use of retail (A1) units to other uses. Under Policy S4, the 88 percent of A1 units recorded in 2008 should be retained in subsequent years, unless any of these units are vacant at the time of survey. The drop in proportion of A1 use between 2008 and 2011 is due to a slightly higher number of vacancies. Another change of use approved in the primary frontage since 2008 was the change of use of the Guildford House Gallery from gallery (D1) to Tourist Information Office (A2). This shows that Local Plan Policy S4 is effective in not permitting changes of units from A1, as except for the change of the Gallery to the TIC, the only other changes were due to an increase in vacant A1 units.
2.24 Local Plan Policy S5 permits changes to A2 and A3 uses (and therefore also to A4 and A5 uses) within the secondary frontage provided that several conditions are met. Exceptionally, other main Town Centre uses may be permitted. There have been three applications approved in the secondary frontage over the last year, a change of use from A3 to A1, a change of use from A1 to A3 and some additional A3 floorspace.

2.25 Figure 4 shows that, as with the primary frontage, the main change in the secondary frontage since 2010 is a reduction in the proportion of A1 and an increase in the number of vacant units.

2.26 The secondary frontage vacancy rate was 19 per cent, with the notable clusters of vacant units occurring in the Friary Centre and White Lion Walk. This increase in vacancy rate in the secondary frontage is primarily due to the internal redevelopment of the Friary Shopping Centre and the high level of vacancy produced by this.

2.27 Westfield began a renovation of its Friary Shopping Centre at the beginning of 2011, resulting in a higher vacancy rate for the Friary Centre this survey year (for more detail on Guildford’s Vacancy rate see section VI). This £40m revamp will create bigger stores, as well as improving the external and internal appearance of the shopping centre. The centre has already attracted new names to Guildford including Hollister, Republic, and Nine West who will be moving in on completion of the works. The re-launch will take place in late November.
2.28 Figure 5 shows a far greater mix of uses in Guildford's tertiary frontage than in the secondary frontage. The Local Plan requires the tertiary frontage to retain a proportion of A1 uses for daytime activity, whilst allowing complementary uses. Local Plan Policy S6 permits changes to A2 and A3 uses (and therefore also to A4 and A5 uses) in the tertiary frontage provided that several conditions are met (including retention of at least approximately one-third (33 per cent) of units in A1 use, provided there would be no more than three adjacent permitted non-A1 units), and the length of any non-A1 (retail) frontage would not exceed 20 metres. Exceptionally, other main town centre uses may be permitted.

There are a total of 87 units in the tertiary frontage. There is only a small difference between 2010 and 2011, most notably a three percent increase in the number of vacant units. Between 2008-2011, only one change of use application from A1 was approved, being a change to A2.

2.29 At the top of the High Street, number 253, the former Guildford Hotel was vacant at the time of the May 2011 surveys, undergoing a £60m refurbishment and extension. A new four star Radisson Edwardian Hotel is due to open in October 2011, some six months after the 2011 town centre survey. The hotel provides 181 rooms, two suites, with conference and event rooms, a spa, swimming pool, gym and several restaurants and bars. An open colonnade to Alexandra Terrace provides an attractive area for dining and relaxation. The hotel is expected to create 165 new jobs in the area.
2.30 This is close to the recently opened (September 2011) G Live, the Council-owned state-of-the-art new venue with seminar rooms, café and a 1,000 seated or 1,700 standing capacity auditorium. Although this is just outside of the town centre’s designated frontage (but within the town centre area), it is expected to have a big impact on this area of the town centre. Along with the new Radisson hotel with its restaurants, bars and conference facilities, G Live is likely to have a positive effect on the vitality and viability of the Upper High Street, and the lower end of London Road and Epsom Road.

Specialist Frontage

2.31 Surprisingly, given that the Policy S7 permits greater flexibility (except for changes to A2 use) than Policy S6 (for Tertiary Shopping Frontages), there is a relatively high proportion (48 per cent) of ground floor units in A1 retail use, although this has greatly reduced since the surveys began in 2008. The proportion of A2 uses (financial and professional uses) is higher (at 3 per cent) than expected given that Policy S7 does not permit changes to A2 use. There are two likely explanations for this. Either these A2 uses are historic (in place before the policy), and/or changes from A3, A4 and A5 uses to A2 were undertaken using permitted development rights, which do not require planning permission. Between 2008 and 2011, two change of use applications were approved from A1 to sui generis uses (nail salon) through exceptional circumstances under Policy S7.

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5 Under the Town and Country Planning (General Permitted Development) Order 1995 (as amended)
2.32 There are 31 units in the specialist frontage (Phoenix Court, Chapel Street and Castle Street) which makes up only six per cent of the total designated frontage units.

II. The amount of retail, leisure and office floorspace in edge-of-centre and out-of centre locations.

Edge-of-Centre

2.33 The edge-of-centre is defined in PPS4, where it has two definitions, one for retail use$^6$, and a wider area for non-retail town centre uses$^7$.

2.34 As the Local Plan 2003 does not directly designated a town centre boundary, the town centre boundary is taken to be the Guildford Town Centre Parking Boundary (defined by Policy M1 - Parking Provision and shown on the Proposals Map, as referred to in the Guildford Town Redevelopment Sites Chapter of the Local Plan). Figure 8 below shows the Town Centre Boundary and the 300m edge-of-centre zone for non-retail uses.

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$^6$ A location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area (the area where retail development is concentrated, and generally comprises the primary and those secondary frontages that are contiguous and closely related to the primary shopping frontage).

$^7$ A location that is generally within 300 metres of the town centre boundary. For office development, edge-of-centre is even broader, including locations outside of a town centre but in urban areas within 500m of a public transport interchange are also considered as edge-of-centre.
2.35 An out-of-centre location is one that is neither in, nor on the edge of a centre, but is within the urban area. With the exception of the two main out-of-centre food stores in the borough (Sainsbury and Tesco), the majority of out-of-centre retail floorspace in the borough is centred to the on the Guildford town centre, around the junction of Woodbridge Road and Ladymead. These are mainly retail warehouses, large stores specialising in the sale of bulky goods (such as carpets/floor coverings, furniture/furnishings, electrical goods, and DIY items), and catering mainly for car-borne customers. In the last year, a Dreams bed store has opened at Woodbridge Road, next to the Jaguar car showroom and the bathroom show room.

2.36 Ladymead Retail Park, completed in 1991 was approved prior to the “town centre first” government policy introduced in the mid-1990s. The planning permission for this retail park is specifically for retail sales excluding food for consumption off the premises. This excludes the Burger King restaurant unit and Unit 8, built in 2002/3 and now occupied by Comet.
2.37 Rents at Ladymead Retail Park appear to have peaked in recent years at around £50/£55 per
III. The potential capacity for growth or change of centres in the network: opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of Town Centre development.

2.38 There are no sites allocated in the Local Plan 2003 solely for retail use. Three Town Centre sites are allocated for mixed-use development including retail. Bedford Road surface car park and the Former Farnham Road Bus Depot are owned by Guildford Borough Council. Land at Guildford Railway Station is owned by Network Rail.

2.39 The site bounded by the rear of properties on North Street to the south, the Friary Shopping Centre to the west and Leapale Road to the east, including the bus station, is included in the Local Plan 2003 as the Friary Major Approved Development Site. Planning permission was granted (outline reference 04/P/00090, reserved matters 06/P/00028) for a mixed use development including 24,923sqm of retail floorspace as an extension to the Friary Centre. This was renewed (09/P/02043) for a further three years to December 2015.

2.40 This 3.57ha redevelopment site offers significant opportunities for growth in town centre uses. This could meet some of the retail need identified by Guildford’s Retail and Leisure Study 2011.

2.41 The Council is preparing a Town Centre Masterplan. Early public engagement was held in June and July 2011. All supporting documents are available at www.guildford.gov.uk/towncentremasterplan. It is anticipated that the Masterplan will be completed and adopted in May 2012. The Masterplan will help to shape how Guildford Town Centre will function, perform, prosper and look in the future to 2030.

IV. Retailer representation and intentions to change representation: existence and changes in representation of types of retailer, including street markets, and the demand of retailers wanting to come into the centre, or to change their representation in the centre, or to reduce or close their representation.

2.42 The presence of national multiple retailers can greatly enhance the appeal of a centre to local consumers, in particular, those multiples that act as anchor stores. In Guildford, anchor stores include Marks and Spencer, House of Fraser and Debenhams, attracting other retailers to the area. The attractiveness of Guildford town centre to both retailers and to shoppers is evidenced by the presence of a large proportion of national multiple retailers. The Town Centre designated frontage is approximately 52 per cent multiples, compared with 30 per cent national average. This has reduced from 2005, when it was 60 per cent.

2.43 Despite a predominance of multiple retailers, Guildford Town Centre has avoided being identified

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8 Wadham & Isherwood (July 2011)
9 Retailer that is part of a larger chain of five or more locations found across the country (includes A1, A2, A3, A4 and A5 uses)
10 GOAD Centre Report (August 2010)
11 GOAD Centre Report (October 2005)
solely as a clone town, a town where national multiple retailers occupy the majority of a Town Centre. It retains a strong local identity, in part due to its focus around historic buildings, and its picturesque part-pedestrianised lower High Street with cobbled setts and views out to the hills. The lower High Street has one of the highest concentrations of Grade I and Grade II* buildings of any UK High Street, with 10 such buildings. Most of the remaining buildings on the western end of the High Street are listed Grade II.

2.44 Independent stores are particularly concentrated in the small streets, known as gates, that link the High Street with North Street and the High Street to the Castle. These are designated secondary and specialist frontages, where rents are lower and units smaller than in the prime shopping area. They also provide an attractive environment for small independent shops and cafes.

2.45 Retailer demand for presence in a Town Centre is a very important indicator of the centre’s viability, and therefore its health, as it indicates retailers’ perceived desirability of the centre as a trading location. Appendix 7 of Guildford’s Retail and Leisure Study 2011 shows a continued high level of retailer interest in locating in Guildford, demonstrating Guildford’s attraction as a viable location and a good retail investment.

V. Shopping rents: pattern of movement in Zone A rents within primary shopping areas (Zone A being the first 6 metres depth of floorspace in retail units from the shop window)

2.46 The pattern of movement in primary shopping area Zone A rents provides an indication of the viability or strength of the retail centre. When compared with nearby centres and with competitors, it indicates the relative importance of the retail centre in the regional hierarchy. Zone A rents are measured in £/m² (i.e. the rental value for the first six metres depth of floorspace from the shop window).

![Prime High Street Zone A Rents](Source: Cushman & Wakefield 2010)

**Figure 10:** Prime High Street Zone A rents
2.47 Prime High Street Zone A's rents have recently reached £300/ft$^2$. There has been an upward trend during the last few years increasing from a maximum of about £280 in 2008. A recent deal in the High Street is reported to be for £320/ft$^2$. Zone A rents in other areas of the town have remained fairly static including Market Street (£160 Zone A), Swan Lane (£160), Tunsgate (£90) and North Street (£155)$^{12}$.

VI. Proportion of vacant street level property and the length of time properties have been vacant. Vacancies in secondary frontages and changes to other uses will also be useful indicators. Vacancies can arise even in the strongest Town Centres, and this indicator must be used with care.

2.48 The town centre’s vacancy rate was 15.7 per cent, compared to the national average of 14.5 per cent$^{13}$. This is an increase of 6.7 per cent from the previous year.

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<td>Vacancy Rate</td>
<td>7.3%</td>
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<td>3.3%</td>
<td>4%</td>
<td>9%</td>
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Table 3: Vacancy rate in Guildford Town Centre 1988-2010

$^{a}$ and $^b$ Guildford Town Centre Shops Survey, Guildford Borough Council, October 1995
$^c$ Surrey Town Centre Health Checks, Surrey County Council 2002
$^d$ Prime Retail : The definitive guide to the UK's leading High Streets, Gerald Eve, Autumn 2003
$^e$ Experian Survey 9 July 2004, reported in Guildford Retail Study 2006, Chase and Partners
$^f$ Guildford Retail Study 2006, Chase and Partners (surveyed October 2005)
$^g$ Guildford Town Centre Survey, Guildford Borough Council, March 2008
$^h$ Guildford Town Centre Survey, Guildford Borough Council, June 2010
$^i$ Guildford Town Centre Survey, Guildford Borough Council, May 2011

2.49 In spring 2011 Westfield began renovation of the Friary Shopping Centre. This revamp will create bigger stores and has already attracted new names to Guildford such as Hollister and Republic who will be moving in once the work is complete. In order for Westfield to do this it has had to vacate many of its units. This has directly affected the town centre's vacancy rate. Of the 74 units of the Friary Centre prior to renovation, over half (51 percent) of the 38 units were vacant at the time of our survey in May.

2.50 As the Friary Centre renovation skews the data for the year, the town centre vacancy rate is also provided without the Friary Shopping Centre. This gives a vacancy rate of 10 per cent which is only slightly higher than the vacancy rate in May 2010, before the renovation began.

2.51 Since July 2010 the Council has been recording town centre vacancies rates each month. The results of these surveys are presented at Figure 11. This enables us to record the length of time that town centre units remain vacant, and will help us to build a picture of the attractiveness and

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$^{12}$ Wadham & Isherwood July 2011
$^{13}$ “Shop Vacancy Report” Local Data Company (first half of 2011)
viability of the town centre. Since December 2010 there has been a steady rise in vacancy in the Town Centre. This is partly due the renovation of the Friary Shopping centre, so should reduce by the end of 2011.

![Town Centre vacancy](image)

**Figure 11: Monthly vacancy rate in Guildford Town Centre**

2.52 The Friary Centre will be re-launched in late November 2011, to coincide with the switch on of the town centre Christmas Lights. These vacancies in the Friary Centre during renovation should not affect the vacancy rate after its re-opening.

2.53 We recorded a fairly high number of vacant units in White Lion Walk; in May 2011 33 per cent (seven of the 21 units) were vacant. This is likely to be related to the proposed internal improvements to White Lion Walk, which were recently confirmed (11/P/01500) to be permitted development, not requiring planning permission. The improvements involve an additional 163sqm retail floorspace (created by filling in the lift atrium and escalators), amalgamating shop units to create a large unit, and increasing the size of three units by 21.54 sqm by moving their shopfronts forward to incorporate a small section of the existing pedestrian thoroughfare. Whilst the improvements to the Friary Shopping Centre and White Lion Walk increase the vacancy rates, they will in time deliver improved shopping environments.

2.54 Using the monthly retail unit survey data, from this year we are able to get a better understanding for the amount of time units remain vacant. Table 5 shows that the majority of vacancies occur in the secondary frontage.

<table>
<thead>
<tr>
<th>Months Vacant</th>
<th>Primary</th>
<th>Secondary</th>
<th>Tertiary</th>
<th>Specialist</th>
</tr>
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<tr>
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### Table 4: Length of time Town Centre shops have been vacant

<table>
<thead>
<tr>
<th>Weeks</th>
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<td>8 to 23</td>
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<td>24+</td>
<td>0</td>
<td>6</td>
<td>4</td>
<td>1</td>
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</tr>
</tbody>
</table>

VII. Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental): demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments. This indicator should be used with care.

![Prime Retail Yields](image.png)

(Source: Cushman & Wakefield 2010)

**Figure 12: Prime retail yields, Guildford and nearby centres**

2.55 Figure 12 shows the retail yields in the prime Town Centre location (the High Street between Swan Lane and Market Street), compared to prime locations in competing centres. It shows that Guildford’s retail yield has remained one of the lowest compared to its competitors Reading, Kingston and Basingstoke, providing a healthy retail investment market. Recent deals suggest...
town centre retail yields of around 4.5 percent to 5 per cent for prime High Street units\textsuperscript{14}, so Guildford town centre continues to be a location in which to invest.

\textbf{VIII. Land values and the length of time key sites have remained undeveloped: data on changes in land value and how long key Town Centre and edge of centre sites have remained undeveloped provide important indicators for how flexible policies should be framed and can help inform planning decisions.}

2.56 The Town Centre Development Study by Cushman & Wakefield 2010 provides information on land values for the Town Centre. The highest land values are found for properties on both side of the High Street, the south side of North Street (Marks and Spencer and House of Fraser extend between the two) and the Friary Shopping Centre. The lowest land values in the Town Centre were recorded at Phoenix Court, the northern part of the Friary Development Site including the shops at the top of Leapale Road and between Haydon Place and Dolphin House. Land values at Friary Street and Tunsgate Square and North Street between Commercial Road and Haydon Place have land values between the highest and lowest.

2.57 Guildford Plaza, between Portsmouth Road and Bury Street is a key site within the Town Centre, within the Town Centre Conservation Area and close to several listed buildings. It was originally granted planning permission for redevelopment for offices in 1999, but has remained undeveloped since demolition of the building in 2000. Planning permission was granted at appeal for a large office redevelopment in February 2008, and was extended for another three years in July 2010. This appears to have been due to issues relating to economic viability, which are expected to be resolved in the near future. Parts of the Friary extension development site have remained in temporary uses including car parking, some for over four years, although much is still in use.

\textbf{IX. Pedestrian flows (footfall): a key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening, who are available for businesses to attract into shops, restaurants or other facilities.}

\textsuperscript{14} Wadham & Isherwood, July 2011
2.58 Springboard, the leading town centre footfall organisation which monitors over 85 towns and cities, identified that, despite regional cities across the UK seeing an average year-on-year decline in footfall of -4.7 percent, a number of densely populated areas offer further glimmers of hope. In Guildford footfall jumped by +12.5 percent year-on-year. Figure 13 shows a comparison in footfall between the two monitoring years, April 2009 - March 2010 and April 2010 - March 2011 (using Springboard data). It shows an increase in footfall between the beginning of 2010 and 2011 which is due to the increase in footfall seen on North Street shown in Figure 14 below.
Figure 14: Guildford Town Centre footfall, street comparison

2.59 Figure 15 shows that the footfall in Guildford High Street has remained quite constant over the last two years. In the second half of 2010, North Street footfall was lower than the second half of 2009. However, in late 2010, North Street footfall picked up, so that early 2011 saw higher footfalls than the same time the previous year. Springboard figures also indicate a strong performance compared to the national picture, with an increase of 8.1 per cent compared to national decline of 1.4 per cent.\(^{15}\)

X. Accessibility: ease and convenience of access by a choice of means of travel, including – the quality, quantity and type of car parking; the frequency and quality of public transport services and the range of customer origins served; and, the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions.

2.60 Accessibility to Guildford Town Centre has not changed since the 2008 baseline Town Centre Vitality and Viability Report 2008 (page 16).

XI. Customer and residents' views and behaviour: regular surveys will help authorities in monitoring and evaluating the effectiveness of Town Centre improvements and in setting

\(^{15}\) Springboard National High Street Index, “Average Year to Date” Jan to June 2011
further priorities. Interviews in the Town Centre and at home can be used to establish views of both users and non-users of the centre, including the views of residents living in or close to the centre. This information could also establish the degree of linked trips.

2.61 The Guildford Visitor Survey 2007 and the draft Town Centre Usage Guide 2008 include summaries of surveys of town centre users. These are both reported in the 2008 baseline report (page 20) Town Centre Vitality and Viability Report 2008.

2.62 A telephone household survey of the retail habits of 1,000 households was undertaken in December 2010 to inform the Retail Study Update. Questions were worded to specifically exclude Christmas shopping. The survey (page 50 of the report and Appendix 5) found that both comparison and convenience sectors in Guildford borough benefit from healthy retention levels. Market shares of both sectors have remained similar since the 2006 household survey, although the comparison goods market share of retail parks has increased since 2006. This is mainly due to lack of redevelopment for retail use of the Friary Extension site and other sequentially preferable locations for additional retail floorspace. The main comparison goods spending competition is from Woking and Kingston.

Guildford town centre has maintained and slightly improved its market share, particularly in expenditure from households within the borough. This is despite competition and a lack of significant town centre development. This is consistent with national trends indicating larger centres are strengthening compared with smaller centres. There is limited evidence of linked trip spending with convenience shopping trips, probably due to the out of centre location of the two main foodstores in the borough.

XII. Perception of safety and occurrence of crime: should include views and information on safety and security, including from the threat of terrorism, and where appropriate, information for monitoring the evening and night-time economy.

2.63 Data from www.police.uk shows that the average number of crimes per month in Guildford town centre between April and June 2011 is 487. We are unable to compare this to the previous year’s data as the recording area has changed. Figure 15 overleaf shows the crime rate within Guildford Town Centre for May 2011. It also shows the breakdown of crime including burglary, robbery, vehicle crime, violence and anti-social behaviour.

Safer night-time economy

2.64 Publicans and Surrey Police have launched a scheme to crack down on underage drinking and the use of fake identification in Guildford’s pubs and clubs. The scheme is being run by the Guildford Safer Neighbourhood team in conjunction with Guildford Pubwatch. Starting in a couple of bars and clubs, if successful it will be rolled out across the whole of Guildford.

Powers to reduce anti-social drinking in a wider area of the town centre were extended at the end of 2010. With a maximum fine of £500, the new Designated Public Place Order gives the police powers to stop people drinking alcohol if their behaviour is causing a nuisance or distress to others.
2.65 Guildford Street Angels, a team of volunteers supporting people who have become vulnerable in the town centre after having too much to drink, started in Guildford in October 2008. They now operate with support from Surrey Police and the Safer Guildford Partnership. Guildford Street Angels operate on Friday and Saturday nights, as well as Mondays to support the University of Surrey Students, and special events. Guildford Street Angels acquired a new town centre office in Tunsgate Square shopping centre in the summer of 2010 giving them a new base in the centre of Guildford.

2.66 Surrey Police, as part of the ongoing national counter terrorism strategy, has dedicated Counter Terrorism Security Advisers (CTSAs) who are coordinated, trained and tasked by the National Counter Terrorism Security Office\textsuperscript{17} (NaCTSO), a specialist police organisation co-located with

\textsuperscript{16} Police.uk - Surrey Police Local Crime Mapping, May 2011
\textsuperscript{17} www.nactso.gov.uk
the Centre For Protection Of National Infrastructure\textsuperscript{18}. These advisors provide counter terrorism protective security advice to support business.

XIII. State of the Town Centre environmental quality: should include information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces).

2.67 Guildford Society, in liaison with the Council's Environmental Project service, undertook a streetscape audit of the town centre in 2011. This audit involved mapping all of the signage, including A-boards, and street furniture, including lampposts and benches. In considering its road signage policy, Surrey County Council also approved a Decluttering Roads Policy on 8 February 2011. Dealing mainly with highways signage, it advises that Local Committees may wish to agree a local de-cluttering programme for their area.

2.68 The most recent completed environmental improvements in the town centre are the Trinity Gate environmental improvements and the Friary Passage. These were reported in last years Town Centre Vitality and Viability report\textsuperscript{19}.

2.69 Other projects that have been completed this monitoring year in the wider area around the town centre and district and local centres are reported in the Table 5.

<table>
<thead>
<tr>
<th>Ash Wharf</th>
<th>Redesign and refurbishment of wharf side public space. Maintenance contract now started.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stoke Road York Road</td>
<td>Replanting of green space.</td>
</tr>
<tr>
<td>Worpleson Road Shopping</td>
<td>Redesign and refurbishment of area in front of shopping parade.</td>
</tr>
<tr>
<td>Parade</td>
<td></td>
</tr>
<tr>
<td>Station Approach, York</td>
<td>Replanting of green space</td>
</tr>
<tr>
<td>Road/London Road</td>
<td></td>
</tr>
<tr>
<td>Ladymead - Joseph's Road</td>
<td>Redesign and refurbishment of public footpath and greenspace, creation of public space</td>
</tr>
<tr>
<td>Phase 1 - end of March 2011</td>
<td></td>
</tr>
</tbody>
</table>

Table 5: Public space improvement projects completed in Guildford Borough 2010/2011

2.70 The Tourism Information Centre (TIC) has been relocated from Tunsgate to Guildford House on the High Street. The operational benefits of combining the Gallery and TIC into one building are substantial, both in terms of increasing the potential numbers of visitors to the building and achieving financial benefits.

\textsuperscript{18} www.cpni.gov.uk
\textsuperscript{19} Annual Monitoring Report 2009/2010
3 DISTRICT CENTRES

3.1 The Local Plan 2003 (Policy S8) designates two district centres within the borough’s retail hierarchy. The national criteria for designation of local and district centres are set out in PPS4. These district centres are shown on the Local Plan Proposal Map. The 2011 Roger Tym & Partners Retail and Leisure Study includes (pages 52-53) a summary of the current health of the two district centres. The Study notes that East Horsley in particular has a very good balance of convenience, comparison and services.

Wharf Road, Ash

3.2 Wharf Road, Ash District Centre is located within the Ash and Tongham urban area, directly east of the Basingstoke Canal, close to the county border with Hampshire. The district centre is approximately 15 minutes walk north from Ash railway station, and is centred on the cross roads of Shawfield Road and Ash Hill Road.

3.3 The centre has a good mixture of convenience and comparison shops. Since the baseline year of 2008 there have been some minor changes. The vacancy rate has increased by 11 per cent, from 3 per cent to 14 per cent (being five of the 35 units). The graph below (figure 16) shows the prevalence of ground floor uses by use class in the 35 units in the centre.

![Figure 16: Ground floor Use Classes in Wharf Road, Ash District Centre](image-url)
Station Parade, East Horsley

3.4 Station Parade, East Horsley District Centre is located on the eastern side of the borough, within the Green Belt. The district centre is only a few minutes walk south of Horsley railway station, and car parking is available within the centre. This centre has a good collection of both convenience and comparison stores. The vacancies recorded at the time of this survey had previously been a hairdressers, a clothes shop and a green grocers. However since the survey in May 2011, the green grocers has been occupied by a bakery.

Figure 17: Ground floor Use Classes in Station Parade, East Horsley District Centre
4 LOCAL CENTRES

4.1 There are 22 Local Centres located across the borough. These are designated by Local Plan 2003 Policy S9, based upon criteria listed in the Local Plan, and are shown on the Local Plan Proposal Map. Table 6 shows the number of units in each use classes within the local centres.

Aldershot Road, Westborough
4.2 Located on one of the main radial routes out of Guildford Town Centre the centre is anchored by a Co-operative Supermarket (approx. 900m²) and supported by the large number of houses within walking distance. The centre consists of 10 units of predominantly retail use.

Ash Vale Parade
4.3 This local centre is supported by passing traffic to and from Ash Vale railway station, around which it is centred. Units are consequently stronger on the south side of the railway arch, near the pedestrian entrance to the station. North of the railway the use class of all the units are currently finance and professional services (A2), ranging from estate agents to solicitors. There were no vacancies at the time of the survey. Little of the retail is convenience except for a small grocery store. Other uses, such as a café, point to the importance of passing trade. There is a council car park of 29 spaces at the station, and also parking in front of several of the units.

Bishopsmead Parade, East Horsley
4.4 This an attractive local centre consisting of a row of 13 commercial units with two floors of residential above. There is a good retail offer, although comparatively little convenience; just two of the 13 commercial units. There is visitors’ parking in front of the units although the centre could benefit with some more available spaces. The only real convenience offer is a newsagent/Post Office. Other food retail is restaurant/takeaway and a café/delicatessen. Other uses are mainly services or niche comparison such as a dentist, optometrist and estate agent.

Collingwood Crescent, Boxgrove
4.5 A small local centre, but well-used with a notable convenience offering in the form of an independent food retailer, and a grocery store. There was adequate parking with spaces to the front and side of the centre. This centre has not changed in the last three years, there are no vacancies and the subjective experience of the site visit was of a centre that enjoyed a respectable footfall for one located outside of main pedestrian or traffic through routes.

Effingham
4.6 There has been no change since the last survey. This small centre has a classic mix of local convenience uses including a small independent supermarket, Post Office, independent butcher, baker and hardware store. The centre was well used at the time of the site visit, and there were no vacancies recorded.

Epsom Road, Merrow
4.7 Heavily trafficked, on one of the main radial routes into Guildford. The local centre is anchored by a small Marks and Spencer Food store within a petrol station. Niche comparison units such as the Italia Conti Arts School shop reiterate the importance of non-local trade. A new housing development of flats with retail units on the ground floor is now complete, and is now almost completely occupied. Parking is available in several locations behind the main shopping frontage.
There are a couple of vacant units in those being the newly developed retail unit at 253-263 Epsom Road.

**Fairlands**

4.8 Consists of a small parade of nine units with two floors of residential above. The only convenience goods offer is from a newsagent and a Post Office that sell similar products. The centre now has no vacant units compared to the three the previous year. These have been filled by a florist, a tanning salon and a flooring shop. There is a reasonable amount of parking to the front of the shops.

**Kingfisher Drive, Merrow**

4.9 Small but seemingly well-used centre with flats above, part of a 1980s housing estate. A doctors’ surgery and school are located adjacent to the centre. There is also a small parking area adjacent. The design of the roads around the local centre, mainly being cul-de-sacs, makes this local centre much more convenient to reach by car than other local centres. The one vacant unit recorded in the 2008 survey was still vacant in May 2011 and has been vacant for over three years.

**London Road, Burpham (Kingpost Parade)**

4.10 A large and well-used local centre with flats above, located on one of the key radial routes into Guildford and with well-used car parking bays (adopted by Surrey County Council highways) in front. The centre has comparatively little convenience retail, mainly in the form of a bakery and Post Office/newsagent. Most units are comparison including a cycle shop. The restaurants/takeaways, and two estate agents and a bank, point to the significance of passing trade. Close to Sainsbury’s out-of-centre superstore and several of the units, the fishmonger and wine shop, indicate a comparatively high level of spend for a local centre. As a result of a residential building development near opposite Kingpost Parade, funds became available for environmental improvements to the area through a planning obligation. Having consulted with the local community on the design of the scheme, drawings and contract documents were finalised. Work started in September 2011, and is scheduled to be completed in November 2011. The landscaping planting is expected to begin in spring 2012. Adjacent to this residential development, the former Green Man public house site remains vacant following its demolition.

**Madrid Road, Guildford Park**

4.11 A medium-sized local centre, well supported by passing trade and the adjacent terraced housing. Anchored by medium-sized Co-operative supermarket, there is a range of convenience offer including a pharmacy. There are also some niche comparison shops. There were no vacancies at the time of the survey.

**Manor Road, Stoughton**

4.12 A dispersed local centre with a number of vacancies. Of the six retail units there is currently one vacancy. There is one grocery store, but otherwise the units are occupied by specialist services such as a hairdresser, beauticians, a tattoo parlour and an area of offices in the south of the local centre, some appearing to have limited off the street trade. A small group of units at the north constitutes the main core of convenience retail. This is by far the weakest of the local centres, whose boundary should be redrawn to focus on the convenience retail core at the northern part of the centre.
Ripley
4.13 By far the largest local centre by number of units. Ripley local centre is located in the Green Belt village, either side of the B2215. It has a very pleasant character and environmental quality despite a reasonable through-flow of traffic. Due to its historic role and development, Ripley feels closest in character to a market town of any of the local centres. Shopping is niche comparison (mainly higher price furniture or antiques) or convenience, with the concentration of service uses such as hairdressers. There is also a concentration of estate agents, similar to the two district centres. There are, however, no banks in Ripley. Out of the 32 retail units in Ripley there were seven recorded vacancies.

Send
4.14 A small parade of shops with flats above. There is no grocery store, but one large newsagent. Other uses include a restaurant, take-away and sandwich bar. No vacancies have been recorded from the last two surveys, so the centre as a whole seems viable.

Shalford
4.15 A medium-sized local centre with significant passing trade. It has a pleasant character due to its architectural character and its outlook over the open space with a pond to the south. Commercial units are interspersed with houses. Most units are niche comparison, such as the gallery, toy shop, and wine store. There are also a few services including takeaways, restaurants and a dry cleaner. There is no convenience/grocery store that would greatly benefit the village. There were two recorded vacancies. There is a vacant site toward the middle of the local centre that was the former Total petrol station that has been demolished and the site cleared. This site has been vacant for now over three years.

Shere
4.16 A medium sized local centre, in a picturesque rural location. Some uses, such as tea rooms, are clearly supported in part by a tourist trade. There is a medium-sized grocery store (Co-operative) and an independent greengrocer are the only convenience offer, however there is also a baker just outside of the designated local centre. There is also some niche comparison in the form of a gallery, antique shop and bespoke fitted kitchen retailer. With a newly refurbished car park nearby and with no vacancies in the retail frontage, the centre as a whole appears in good economic health.

Southway, Park Barn
4.17 A small local centre with a newsagent and Post Office having broadly similar offers. The catchment appears to be very localised. There was a double-fronted unit under refit at the time of survey. Southway local centre is very close to the out-of-centre Tesco superstore at Ashenden Road. There has been no change since the last survey. The local centre has clearly found an adequate local niche to support its viability.

The Square, Onslow Village
4.18 A small local centre with a somewhat village-like character, located opposite Onslow Village Hall. Very quiet and little passing trade, however there are no vacancies. There has been some change since the last survey. The store that combined a butcher/fishmonger/greengrocer has been replaced with an independent village delicatessen.
The Street, Tongham
4.19 A small but well-used local centre with a notable convenience offering, including a bakery and Post Office. It has a pleasant character despite the levels of passing traffic. No vacancies have been recorded in the last two surveys.

Stoughton Road, Bellfields
4.20 Anchored by a large double-unit newsagent/convenience store. The small local centre also has a surgery, a pharmacy and a take-away. The centre was well-used at the time of the site visit, with no vacancies in the last two surveys. The centre underwent the second phase of an environmental improvement works earlier this year.

Woodbridge Hill, Guildford
4.21 A large local centre immediately adjacent to the A3. The centre is anchored by a Co-operative supermarket, with several takeaways and restaurants, and a cheque-cashing service, pointing to a passing-trade catchment. The centre also has two banks and estate agents. Woodbridge Hill contains the most vacant units of all of the local centres with three empty units; two of these have been vacant since the last survey. There is rather poor environmental quality due to the volumes of passing traffic, but neither of these appears to be undermining the viability of the centre as a whole. There has been very little change since the 2008 survey, the main one being the Co Operative Funeral Care moving into one the vacant units.

Woodbridge Road, Guildford
4.22 A medium sized local centre, dominated by the heavy traffic along Woodbridge Road, and consequently characterised mainly by takeaways and restaurants. There is no real convenience offer other than Majestic Wine, but notable niche comparison such as HHS hire shop and a specialist cake making shop. No vacancies have been recorded since the last survey.

Worplesdon Road, Stoughton
4.23 A medium-sized centre with notable passing trade from through traffic reflected in a concentration of takeaways. A petrol station includes a branch of the SPAR supermarket. There are also a few estate agents. Two vacancies were recorded this year.

4.24 The parking arrangements on the corner of Byrefield Road and in front of the shops on Worplesdon Road often used to block access for buses and service vehicles and made crossing the road difficult for pedestrians. Environmental improvements to Worplesdon Road between Byrefield Road and Sheepfold Road were designed to help alleviate these issues and to improve the safety for pedestrians accessing the shops. These included the addition of bollards and a dropped crossing point. These included a re-alignment of street furniture, planting of new trees, benches and improved parking provision. They were undertaken in August and September 2010 with planning obligation monies.
<table>
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Table 6: Ground Floor Use Classes in the District and Local Centres, May 2011
4.25 Table 6 shows the total number of each ground floor use class in both the district and local centres. The table shows that out of the 399 units in these centres, 24 of these were vacant. This vacancy rate of only six percent is a lot better than that of Guildford Town Centre. One of the biggest local centres is Ripley that has a total of 66 units. Discounting the residential units there are 48 commercial units, more than in either of Guildford’s district centres.

4.26 Improvements in District and Local Centres include putting up chewing gum target boards on which people can stick used gum in Ash, Park Barn and Westborough. This is part of a new initiative run by Guildford Borough Council to help reduce the amount of chewing gum litter in the borough, and the cost of its removal.
5 SUMMARY

5.1 Despite an increase in the overall vacancy rate within Guildford Town Centre since the 2008 baseline report, there have been few vacancies within the Primary Frontage, and those that did arise were not vacant for long. Guildford Town Centre vacancy level was 15.73 per cent at the time of our survey which is one per cent higher than the national average. As the Friary renovation and White Lion Walk improvements skew our data omitting the centre from this gives a vacancy rate of 10 per cent. Guildford remains an attractive centre for investments, with favourable prime retail yields, and high land value. Despite the economic downturn, Guildford continues to provide a low risk, healthy retail investment market.

5.2 A continued high level of retailer demand for locating in Guildford is evident in the retailers and restaurants recently locating in the centre. These include Hugo Boss, Ecco shoes, Gant and Cau restaurant.

5.3 Westfield began modernisation and redevelopment of the Friary Shopping Centre at the beginning of 2011. This revamp will create bigger stores and has already attracted new names to Guildford such as Hollister, Republic, Kurt Geiger and Nine West who will be moving in on completion of the works.

Other successes include:

5.4 A number of environmental improvement projects have been undertaken in the Town Centre, District and Local Centres, many using planning obligation monies. These include Station Approach, Peasmarsh roundabouts, Ladymead - Joseph’s Road, Worplesdon Road Shopping Parade, and land next to Ash Wharf District Centre.

5.5 The monthly Town Centre retail vacancy checks have been a useful tool in assessing the vitality and viability of the Town Centre. It will be useful next year when reporting year trends.

5.6 The District and Local Centre vacancy rate has remained low at six per cent throughout the economic downturn.
6 REFERENCE SOURCES

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Cushman and Wakefield *Guildford Town Centre Development Study* (March 2010)
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Annual Monitoring Report 2009/2010
http://www.guildford.gov.uk/CHttpHandler.ashx?id=7559&p=0

Police.uk - Surrey Police Local Crime Mapping
http://www.police.uk/crime/?q=Guildford, Surrey, UK#crimetypes

Street Angels
www.gtcc.org.uk