



Town Centre Study

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Royal Borough of Kingston upon Thames Town Centre Study

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1. Introduction

1.1 GVA was instructed in January 2013 by the Royal Borough of Kingston upon Thames to undertake a Borough-wide Retail and Town Centre Study. The purpose of this study is to provide a sound and robust evidence base for the formulation of policies and strategic options within the emerging Development Plan policy framework.

1.2 The study is intended to provide a comprehensive baseline and recommended strategy for the network of centres in the Borough over the plan period, with sufficient focus to identify and formulate the opportunities for growth and change. GVA has liaised with key stakeholders in Kingston town centre, including British Land, KingstonFirst BID and Aviva, which has in turn informed our evidence testing, conclusions and recommendations.

1.3 Our terms of reference are to:

- Establish the extent to which the current retail provision in the Borough satisfies the level and nature of consumer demand within the area;
- Estimate the scale and nature of changes in this position that may arise in the light of potential increases in population, and forecast changes in retail expenditure;
- Identify the scale and nature of additional retail provision that may be appropriate in the Borough over the plan period and intervening five year periods;
- Assess the scope for new retail development and the potential to accommodate this within the Borough.

1.4 In order to address the requirements of the project brief, our methodology incorporates a comprehensive review of retailing needs in the Borough, with particular emphasis on Kingston town centre and the Boroughs three district centres; New Malden, Surbiton and Tolworth.

Structure

1.5 This report draws together the findings of our research, incorporating the findings of the newly commissioned household telephone survey, technical analysis of the survey data, town centre audits and advice on town centre policies. The report is structured as follows:

- **Section 2** summarises the national, London-wide and current local planning policies relevant to retail planning within the Royal Borough of Kingston upon Thames;
- **Section 3** reviews the previous retail studies undertaken in the Royal Borough of Kingston upon Thames, providing an overview of the assumptions used and the capacity arising across the Borough;

- **Section 4** provides a review of the retail market, assessing commercial property and town centre trends likely to influence retailing across the Borough;
- **Section 5** reviews the sub regional context and in particular the influence of competing centres on shopping patterns in the wider sub region, including an overview of the potential pipeline developments in competing centres;
- **Section 6** considers the findings of previous assessments of Kingston town centre, and summarises the findings of our detailed 2013 town centre audit;
- **Section 7** summarises the performance of each of the district centres (Surbiton, Tolworth and New Malden), as well as out of centre retail provision;
- **Section 8** sets out our quantitative baseline capacity projections for convenience and comparison goods need in the Borough, focusing particularly on the capacity for further retail floorspace, with regard to identified commitments; and
- **Section 9** sets out our conclusions on the scope for additional retail development, the appropriate strategy for Kingston town centre and district centres, and our recommendations for future planning policy.

2. Policy Framework

- 2.1 This section summarises the national, regional and local planning policy framework for Kingston upon Thames, as well as other material considerations which may be relevant when planning the future growth of the Borough's centres.

National

The National Planning Policy Framework (March 2012)

- 2.2 The NPPF was adopted in March 2012, and makes clear the Government's commitment to securing economic growth in order to create jobs and prosperity and to ensure that the planning system does everything it can to support sustainable economic growth.
- 2.1 The NPPF requires Local Planning Authorities (LPAs) to adopt a positive approach to decision-taking and to apply a presumption in favour of sustainable development. For decision-taking this means that applications which accord with the development plan should be approved without delay. Where the development plan is absent, silent or relevant policies are out of date, permission should be granted unless the adverse impacts of doing so would significantly outweigh the benefits of the development when assessed against the policies in the NPPF.
- 2.2 In terms of retail policies, the NPPF maintains the general thrust of PPS4. It advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. LPAs are required to allocate a range of suitable sites to meet identified needs for retail and other town centre uses in full, which should not be compromised by limited site availability (paragraph 23).
- 2.3 Paragraphs 24-27 confirm the requirements for assessing planning applications proposing new retail floorspace. Paragraph 24 states that a sequential test should be applied to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan. Local authorities should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre.
- 2.4 Paragraph 26 confirms that when assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local

Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold or default threshold of 2,500 sqm.

2.5 Paragraph 27 directs local authorities to refuse an application where it fails to satisfy the sequential approach, or is likely to have significant adverse impact on one or more of the factors listed under Paragraph 26, including:

- The impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- The impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made (up to ten years for major schemes).

Amendments to Permitted Development Rights for Change of Use

2.6 Changes to permitted development rights came into force on 30 May 2013 under the provisions of the Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013. These changes seek to speed up the process of bringing vacant premises back into beneficial use for a temporary period.

2.7 The changes to Class D permitted development rights mean that development consisting of a change of use of a building (of up to 150 sqm) to a flexible use falling within either Class A1, A2, A3 or B1, or to a solely Class A1, A2, A3, A4, A5, B1, D1 or D2 use, is permitted development for up to two years.

2.8 Developers are required to notify the Local Planning Authority (LPA) of the date that the site will begin to be used for the change of use of the building. At the end of the temporary two year period, the site will revert to its previous lawful use.

2.9 The Royal Borough of Kingston was not successful in seeking exemption from the amended permitted development rights. Accordingly, the temporary change of use of premises to a range of retail and town centre uses is permitted development within the Borough.

Practice Guidance on Need, Impact and the Sequential Approach (December 2009)

2.10 The Government Practice Guidance was published in December 2009 to support Planning Policy Statement 4 (PPS4: Planning for Sustainable Economic Growth). The Practice Guidance provides advice to developers and LPAs about the interpretation of town centre policies set out in PPS4. PPS4 was superseded following the adoption of the NPPF. The Government has

confirmed that the Practice Guidance remains in effect until further notice, although draft on line guidance is currently under consultation.

Regional

The London Plan (July 2011)

- 2.11 The London Plan is the overall strategic plan for London, setting out an integrated economic, environmental, transport and social framework for the development of London over the next 20-25 years.
- 2.12 Strategic planning in London is the shared responsibility of the Mayor of London, 32 London Boroughs and the Corporation of the City of London. Under the legislation establishing the Greater London Authority (GLA), the Mayor has to produce a spatial development strategy (SDS) – which has become known as ‘the London Plan’ – and to keep it under review. Boroughs’ local development documents have to be ‘in general conformity’ with the London Plan, which is also legally part of the development plan. It therefore has to be taken into account when planning decisions are taken in any part of London.
- 2.13 The London Plan identifies the existing role and function of town centres in the London hierarchy and provides a broad indication of future growth potential for each centre. Within the Borough of Kingston upon Thames, the London Plan identifies one Metropolitan centre (Kingston) and three District centres (New Malden, Surbiton and Tolworth). To provide some context, Annex 2 describes the London hierarchy of centres as follows:
- **International centres** – are London’s globally renowned retail destinations: the West End and Knightsbridge. They offer a wide range of high-order comparison and specialist shopping with excellent levels of public transport accessibility.
 - **Metropolitan centres** (including Kingston) – serve wide catchments which can extend over several Boroughs and into parts of the wider South East region. Typically they contain at least 100,000 sqm of retail floorspace with a significant proportion of high-order comparison goods relative to convenience goods. These centres generally have very good accessibility and significant employment, service and leisure functions. The nearest Metropolitan centres outside of the Borough are Sutton and Hounslow. The other defined Metropolitan centres consist of Bromley, Croydon, Ealing, Shepherds Bush, Wood Green, Harrow, Romford, Uxbridge and Ilford;
 - **Major centres** – are typically found in inner and some parts of outer London with a Borough-wide catchment. They generally contain over 50,000 sqm of retail floorspace with a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions. There are no Major centres defined in Kingston upon Thames. The nearest Major Centres are Chiswick (in the London Borough of Hounslow), Wimbledon (LB Merton), Richmond (LB Richmond) and Clapham Junction, Putney, Tooting and Wandsworth (all in LB Wandsworth);

- **District centres** (including New Malden, Surbiton and Tolworth) – are distributed more widely than the Metropolitan and Major centres, providing convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floorspace. Some District centres have developed specialist shopping functions. In addition to the three District centres identified in Kingston upon Thames, there are several defined District centres in nearby Boroughs, including in the London Boroughs of Hounslow (Brentford, Feltham High Street), Merton (Mitcham, Morden), Richmond upon Thames (East Sheen, Teddington, Twickenham, Whitton), Sutton (Carshalton Village, Cheam Village, North Cheam, Rosehill, Wallington, Worcester Park), and Wandsworth (Balham);
- **Neighbourhood and more local centres** – typically serve a localised catchment often most accessible by walking and cycling and include local parades and small clusters of shops, mostly for convenience goods and other services. They may include a small supermarket (typically up to around 500 sqm), post office, pharmacy, laundrette and other useful local services. Together with District centres they can play a key role in addressing areas deficient in local retail and other services. The London Plan does not define centres at this level of the hierarchy, leaving individuals LPAs to do so as part of their local plans.

2.14 Policies 2.15 and 4.7-4.8 of the London Plan provide the strategic framework for town centre policy development and its implementation. **Policy 2.15** focuses on promoting and protecting the vitality and viability of the network of town centres across London. It sets out a range of criteria for development proposals in town centres, focused primarily on promoting the range of town centre uses and accessibility by a choice of modes of transport. Boroughs are encouraged to define town centre boundaries and frontages, promote town centre management, and to identify and protect smaller centres, and to manage any decline effectively. The policy emphasises the promotion of a wide range of town centre uses including retail, leisure, higher density housing, civic services and facilities and an enhanced public realm.

2.15 **Policy 4.7** sets out the various principles which should be applied when making plans and determining applications for retail and town centre development. In decision-taking, LPAs should; apply the sequential approach to site selection; require proposals at edge or out of centre locations to be subject to an assessment of impact; and that the scale of the proposal should be related to the size, role and function of the centre. In plan-making, Boroughs should: identify future levels of retail and leisure need; undertake regular health checks; take a proactive approach to identify capacity and bring forward development; firmly resist out of centre development; and managing existing out of centre development in line with the sequential approach.

2.16 **Policy 4.8** supports a successful and diverse retail sector. In the context of planning decisions and LDF preparation, Boroughs are directed to take a proactive approach to planning for retail. Notably, LDF's are instructed to bring forward capacity for additional comparison goods

retailing particularly in International, Metropolitan and Major centres. Larger centres are identified as being appropriate locations for accommodating much of the growth in comparison goods retail expenditure and floorspace because they are the most accessible by public transport and have greater capacity to provide choice and competition. The Plan supports additional convenience retail provision in District, Neighbourhood and more local centres in order to secure a sustainable pattern of provision and strong, lifetime neighbourhoods.

- 2.17 It is relevant to note that Annex 2 of the London Plan identifies Kingston as a centre which has the potential for high growth. High growth centres are defined as those likely to experience strategically significant levels of growth with strong demand and/or large scale retail, leisure or office development in the pipeline and with existing or potential public transport capacity to accommodate it. The Borough's three District Centres (New Malden, Surbiton and Tolworth) are identified as having medium growth potential, which is characterised by moderate levels of demand for retail, leisure or office floorspace and with physical and public transport capacity to accommodate it.
- 2.18 The Plan also defines Kingston as one of several Strategic Outer London Development Centres (SOLDC) in the area. These are defined as locations with specialist strategic economic functions of greater than sub-regional importance. **Policy 2.7** states that in these centres the Mayor will seek to address constraints and opportunities in the growth of outer London so that it can rise above its long term economic trends. This will be accomplished by, *inter alia*, identifying, developing and enhancing capacity to support both viable local activities and those with a wider sub-regional offer; enabling existing sources of growth to perform more effectively; enhancing the vibrancy of town centres through higher density retail, commercial and mixed use development; and identifying and bringing forward capacity in and around town centres with good public transport accessibility.
- 2.19 **Policy 2.16** states that the Mayor, in concert with Boroughs and stakeholders, will promote measures which realise the potential of SOLDCs in line with wider London Plan objectives.

Town Centre Supplementary Planning Guidance (draft January 2013)

- 2.20 The draft version of the GLA Town Centres SPG was available for public consultation until May 2013. The document does not set new planning policy and does not form part of the development plan. However, the SPG explains how London Plan policies should be interpreted and will have weight as a material planning consideration for plan-making and decision-taking.
- 2.21 The Mayor encourages town centres to develop their strengths to fulfil their strategic role and potential. Where retail assessments identify retail need, local plans should facilitate the extension of the retail offer. Where there is little or no need arising, town centres should

consider broadening their functional base by encouraging diversification to leisure, night time economy, cultural, civic and residential uses.

- 2.22 In terms of vacancies, it will be important for LPAs to measure vacancy rates, length of vacancies, repeat vacancies and specific units which are difficult to let. In order to overcome vacancy problems the Mayor advocates securing temporary uses of vacant properties for pop up shops, new business start-ups, creative and community spaces (including 'meanwhile' leases) and temporary planning applications or Local Development Orders for changes of use.
- 2.23 The draft SPG encourages LPAs to plan for a diversity of town centre uses including: a strong retail mix of comparison, convenience and specialist retail; a positive contribution of restaurants, cafes and leisure uses; clustering leisure uses including takeaways and night time economy uses; recognising the value of live music venues as part of a broader cultural offer; developing a 'brand' through the promotion of clusters of cultural activities to provide 'cultural quarters'; providing a range of unit sizes; securing appropriate provision of small shops where viable; and reviewing local plan policies regularly to allow the mix of retail and other uses in town centres to evolve over time to remain competitive.
- 2.24 Street markets provide tangible social and economic benefits to communities and businesses and LPAs should consider: enhancing existing markets or creating new ones; ensuring that markets remain attractive and competitive; adopting proactive approaches to management; and harnessing the tourism contribution of markets.
- 2.25 Of particular relevance to Kingston, Annex 1 of the SPG sets out guidelines for the implementation of measures to support London Plan policies to promote SOLDCs. It guides Kingston to, *inter alia*, promote development to support the role, vitality and function of Kingston Metropolitan Centre.

Local

Unitary Development Plan (2005)

- 2.26 The Unitary Development Plan has been entirely superseded by the Core Strategy and no longer forms part of the statutory development plan.

Kingston Town Centre Area Action Plan (K+20) (July 2008)

- 2.27 The Kingston Town Centre Area Action Plan (K+20) (AAP) sets out the planning policy for Kingston Town Centre and details the measures which will allow it to fulfil its policy objectives. The AAP provides the spatial framework to guide future development and improvement to provide new and enhanced shopping, leisure, cultural, education and community facilities;

new housing and jobs; new and enhanced public spaces; and transport and environmental improvements. It seeks to ensure that Kingston remains a thriving Metropolitan centre servicing the needs of its catchment and providing a sustainable and enhanced range of town centre services and facilities.

2.28 The AAP identifies several key areas which are identified as suitable for change to accommodate new development and facilities. **Policy K1** states that the Council will work with private sector land and property owners to provide 50,000 sqm (gross) additional retail floorspace for comparison goods in Kingston by 2016. This will enhance and extend the Primary Shopping Area, improve vitality and viability and meet the needs of retailers and shoppers, and maintain Kingston's retail role and status as a Metropolitan centre and sub-regional shopping centre. The Council will grant planning permission for landmark new retail facilities as part of mixed use development on the following sites, provided that they complement existing facilities and are fully integrated and connected:

- **Site P1** (Clarence Street North): this site is allocated for high quality comparison retail facilities with residential, including affordable housing;
- **Site P2** (South of Clarence Street) together with P3 forms part of the 'Eden Quarter', an area which is allocated for retail led mixed-use development. It is identified for high quality new comparison shopping facilities in an open street format with a mix of shop sizes, to the rear of the Clarence Street frontage, including the partial redevelopment of the Eden Walk Shopping Centre;
- **Site P3** (East of Eden Street and the Ashdown Road Sites): this site is linked to P2, and is allocated for comprehensive development to provide high quality mixed use development including the extension of the Primary Shopping Area through provision of high quality new comparison shopping facilities in an open street format, with a mix of shop sizes.

2.29 The Kingston Town Centre AAP also sets out a number of more site specific development control policies. **Policy K2** seeks to safeguard and enhance the vitality and viability of Kingston town centre by controlling the use of premises in Primary, Secondary and Other Frontages. **Policy K3** seeks to retain and enhance the role of the market.

Royal Borough of Kingston Core Strategy and Proposals Map (April 2012)

2.30 The Core Strategy (CS) was adopted in April 2012 and sets policies for the growth and development of the Borough up to 2027. The CS includes both strategic guidance and Development Management policies and is accompanied by a Proposals Map. It entirely replaces the previous Unitary Development Plan (2005).

2.31 **Policy CS12** sets objectives for the Borough's centres. The Council will maintain and enhance the attractive and distinctive character of Kingston Town Centre to maintain its position as a

successful Metropolitan and sub-regional centre. This will be achieved by the implementation of the Kingston Town Centre AAP, which together with the Core Strategy form the development plan for the Borough.

- 2.32 Policy CS12 also confirms that the Council will seek to enhance the vitality and viability of the Borough's District centres so that they complement Kingston and provide residents with a range of services and facilities that are needed locally. Local Centres and convenience shops will also be protected and enhanced.
- 2.33 The Core Strategy also sets out the following related development management policies:
- **Policy DM19** protects existing retail uses in the District Centres, retaining the allocated shopping frontages for predominantly retail use. Applications for change of use that would threaten the predominance of A1 uses will be resisted.
 - **Policy DM20** sets out policy tests for the determination of applications for new retail development. It states that applications for new retail development in designated centres should be considered favourably, in order to meet identified future needs and ensure accessibility by sustainable transport. Where necessary, applications will need to demonstrate the sequential approach to site selection and provide an impact assessment as outlined in national guidance. Proposals will also need to ensure that they are of the appropriate scale and have been positively prepared to minimise any negative impacts arising from climate change, transport, design, amenity, etc.
- 2.34 The Core Strategy does not specify a quantum of retail floorspace to be delivered in the Borough or its centres over the plan period. Instead, the CS refers to the Kingston Town Centre AAP as the mechanism through which the vision for Kingston will be implemented (discussed below).
- 2.35 The Core Strategy identifies Kingston as a Key Area of Change. These are defined as areas which will be promoted to benefit local and wider needs. By 2027, the vision is for Kingston to be a thriving Metropolitan Town Centre which serves the needs of its catchment and providing a sustainable and enhanced range of town centre services including retail, leisure, employment, education and community facilities. The Town Centre AAP sets the strategy and allocates relevant sites for delivering this vision.
- 2.36 Tolworth is also identified as a Key Area of Change. **Policy T1** sets the policy for Tolworth and seeks to, *inter alia*, strengthen the vitality and viability of the District centre through work with private sector land and property owners to improve the diversity of shopping and local services, enhance its attraction and competitiveness, increase visitor numbers, dwell time and

spend. It identifies opportunities for development, including the Tolworth Tower complex and the Ewell Road/Red Lion Road corner.

- 2.37 The retail evidence base used to inform both the Core Strategy and Kingston Town Centre AAP is now dated (based on 2002 household survey data). This is discussed in further detail in Section 3 of this report. Furthermore, none of the studies undertaken previously assess quantitative need for new comparison goods floorspace in the District Centres. This suggests that the development plan may not currently meet the needs of the area in full.
- 2.38 The Adopted Proposals Map (April 2012) incorporates both Core Strategy and Kingston Town Centre AAP policies. The Kingston Inset Area Map supersedes the Kingston Town Centre AAP Proposals Map.

Local Development Scheme (April 2012)

- 2.39 The latest Local Development Scheme sets out the programme for production of remaining Local Development Framework documents being prepared for the Borough.
- 2.40 A revised Kingston Town Centre Area Action Plan is being proposed as a framework to bring forward development of critical sites, and to coordinate the range of development interests in promoting the position and competitiveness of Kingston in relation to other retail centres. This study forms part of the evidence gathering to inform the emerging plan.
- 2.41 The Proposals Map will be revised as further DPDs are adopted.
- 2.42 The Core Strategy does not include any site allocations, other than the Key Areas of Change, and a site allocations document is not being produced. Instead, those sites with potential for development have been identified by the Council as 'opportunity sites' in its evidence base and these will be implemented through proactive Development Management.

Summary

- The NPPF was adopted in March 2012 and replaces former national planning guidance including PPS4. The NPPF maintains the general thrust of PPS4 and advocates a 'town centres first' approach. It requires planning policies to positively promote competitive town centre environments and to manage the growth of centres over the plan period so that needs for retail uses are met in full and are not compromised by limited site availability.
- The statutory development plan relevant for the determination of applications consists of the London Plan (2011), the Royal Borough of Kingston Core Strategy (2012) and the Kingston Town Centre Area Action Plan (2008).

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- The London Plan (2011) identifies the network of town centres in London. The Plan supports the provision of significant amounts of comparison goods retail primarily to the higher order international, Metropolitan and major centres and supports the provision of convenience goods retail in district, neighbourhood and local centres to support more localised and sustainable shopping patterns. Kingston is identified as a Metropolitan centre, with New Malden, Surbiton and Tolworth identified as District centres.
 - The retail evidence base used to inform both the Core Strategy and Kingston Town Centre AAP is now dated (based on 2002 household survey data) and indicates that the development plan may not currently meet the needs of the area in full. This is particularly the case for the District Centres, as none of the retail studies undertaken assess quantitative need for new comparison goods floorspace.
 - The Royal Borough of Kingston Core Strategy (2012) identifies the retail hierarchy of the Borough, planning priorities for each town centre and sets out relevant policies for development management. This document seeks to maintain and enhance Kingston Metropolitan centre by providing a wider range of facilities and services, including new retail development. The District and local centres will complement Kingston's role, providing residents with a range of services and facilities that are needed locally. Within the District Centres, allocated shopping frontages are safeguarded for predominantly A1 use. Both Kingston and Tolworth are identified as Key Areas of Change, which will be promoted to benefit local and wider needs.
 - The Kingston Town Centre Area Action Plan (2008) promotes 50,000 sqm (gross) of additional retail floorspace for comparison goods in Kingston by 2016. This will be delivered on a number of key town centre opportunity sites to the south east of the town centre. The AAP is based on an evidence base which is now quite dated and may not therefore meet the forecast needs of the Borough in full, as required by the NPPF. As such, the weight which can be attached to retail capacity promoted in the Kingston Town Centre AAP is limited.
 - In accordance with the Kingston Town Centre AAP and Portas Review, we consider that over the plan period it will be important for the Borough to continue to develop the key strengths and unique selling points of Kingston and the supporting District Centres in order to adapt and innovate in response to the challenges facing town centres.

3. Previous Retail Studies

3.1 The retail evidence base which informed the Kingston Town Centre AAP consists of the Retail Study (January 2003), Retail Capacity Study (July 2003), Retail Study Update (September 2006) and Retail Study Update (June 2010). These studies were based on a household survey undertaken in 2002. As such, the retail evidence which informed the adopted Kingston Town Centre AAP is now quite dated and may not meet the forecast needs of the Borough in full, as required by the NPPF. The weight attached to retail capacity promoted in the AAP may therefore be limited. The conclusions of the previous retail studies are discussed below.

Retail Study (January 2003)

3.2 The original Retail Study which informed the existing development framework is the January 2003 Retail Study undertaken by Roger Tym and Partners (RTP). This study sought to understand existing shopping patterns and the attitudes of residents, shoppers and retailers in respect of existing shopping provision in Kingston and the three District Centres. The study was based on an extensive Borough-wide household survey (undertaken in 2002), in-centre shopper's surveys, existing retailer/business and non-represented retailer questionnaires.

3.3 The study consisted of a qualitative assessment of the retail floorspace in the Borough in order to provide guidance on the future direction of retail strategies in the Borough. The study did not include a quantitative assessment of forecast need in the Borough. Rather, the study concluded that on the basis of recorded market shares and continued (unspecified) retail expenditure growth forecasts, Kingston town centre could accommodate significant growth in retail floorspace.

3.4 It concluded that there was a significant need for retail development in Kingston Town centre, driven by continued growth in comparison goods expenditure and the level of demand from retailers for representation in Kingston. The Retail Study concluded that, on this basis, the centre could support a significant but unspecified amount of additional retail floorspace.

3.5 The study considered that there was no need for major additions to retail floorspace in the District Centres. Again, this conclusion was not the result of a quantitative assessment of forecast need.

Retail Capacity Study (July 2003)

3.6 Following from the January 2003 study, RTP carried out a subsequent assessment to determine the quantum of new retail development needed in Kingston town centre and its capacity to

accommodate new provision. The conclusions of this study underpinned the Kingston Town Centre AAP.

- 3.7 The 2003 Retail Capacity Study did not seek to assess the potential growth in the District Centres as the 2003 Retail Study identified no need for major additions to retail floorspace.
- 3.8 The study adopted the MapInfo ultra-long growth rate of 3.6% per annum for comparison goods expenditure. Real growth rates for comparison goods calculated by Experian show that growth rates fluctuated between 2003 and 2011, showing negative growth between 2003 and 2005 (c.-2.4% annual growth rate), a 3.1% pa growth rate between 2005 and 2006, negative growth between 2006 and 2009, before making a recovery of 5.4% between 2009 and 2010. Accordingly, as a result of the recession, previous forecast growth rates used in the previous study will have overestimated available comparison goods expenditure,
- 3.9 For convenience goods, the previous study adopted the medium-term expenditure growth rate figure of 0.3% as RTP considered that the lower longer term estimate of 0.1% was not realistic. Real growth rates estimated by Experian show that expenditure growth on convenience goods has also fluctuated as a result of the economic downturn. Figures show that there was negative growth between 2004 and 2006 (c.-0.4%), followed by c.0.4% growth between 2006 and 2008, negative growth of -2.4% between 2008 and 2009, followed by continued growth between 2009 and 2011 (1.4% growth between 2009 and 2010).
- 3.10 As a point of comparison, the expenditure growth rates adopted for the present study have been taken from Experian and are lower for comparison goods expenditure (between 2.8% and 2.9% after 2013) and higher for convenience goods (between 0.5% and 0.8% after 2013).
- 3.11 With respect to deductions for Special Forms of Trading (SFT), for comparison goods these were 8.4% in 2006, 9.2% in 2011 and 10.0% in 2016. For convenience goods, the study deducted a level figure of 1.5% from the per capita spending estimates in each assessment year, which was higher than the figure recommended by MapInfo and was used to ensure a cautious approach. The SFT deductions included in the present study are higher for both comparison goods (15% in 2013 growing to 20% in 2028) and convenience goods (3% in 2013 growing to 5% in 2028), reflecting the growing popularity of the internet, and in particular the strength of internet sales in the Kingston area.
- 3.12 The study stated that, on the basis of constant market shares, Kingston could support an additional 20,000 sqm (net) of new comparison goods floorspace by 2006 and a further 28,000 sqm (net) by 2011. However, when forecasting floorspace capacity, RTP considered that it was more appropriate to adjust market shares downwards to reflect the likely impact of new and future developments in competing destinations outside of the Borough. At this adjusted level, the study concluded that there was expenditure to support an additional 14,500 sqm (net)
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comparison floorspace by 2006 and an additional 20,500 sqm (net) by 2011. With respect to convenience goods, the study concluded that growth would be more limited and that Kingston town centre should plan for somewhere between 1,300 and 1,700 sqm (net) new floorspace by 2011.

- 3.13 The study identified some physical capacity to intensify retail development in the existing primary shopping area, but concluded that this would be insufficient to accommodate all forecast need. The study also considered the potential to expand the Kingston retail area. It concluded that a 1.77ha site on Ashdown Road offered the best potential to deliver new floorspace and strengthen the retail circuit in Kingston Town Centre.
- 3.14 The study concluded that development of Kingston town centre at the forecast scale would not impact on the Borough's other centres, or indeed other centres within the primary catchment area, because these centres were identified to perform a different role to Kingston town centre. The addition of more retailing in Kingston will retain more shopping trips in Kingston that would otherwise be made to the large competing centres further afield.

Retail Study Update (September 2006)

- 3.15 RTP was commissioned to undertake an update to the 2003 Retail Study and Retail Capacity Study. The 2006 Update used new data and assumptions based on the latest expenditure data, changes in retail floorspace, and revised assumptions on market shares in order to provide revised expenditure and floorspace requirements for the Borough over the forecast years. The study also modelled need up to 2016, both for quantitative comparison goods need within Kingston Town Centre and for Borough-wide convenience goods need. However, the study was still based on the 2002 household telephone survey results.
- 3.16 The study also updated information on expenditure growth rates, sourced from MapInfo. For comparison goods, the growth rates used were: 9.3% real growth for 2003-2004; 3.8% per annum projected growth between 2004-2006; 4.1% per annum projected growth between 2004-2011; and 4.3% per annum projected growth for 2004-2016. These expenditure growth rates are lower than the growth rates adopted for the present study. The 2006 study used the same deductions for SFT as in the 2003 Study.
- 3.17 For convenience goods, the expenditure growth rates used were: 0.6% real growth for 2002-2003; 1.6% real growth for 2003-04; 0.8% per annum projected growth for 2004-2011; and 0.9% per annum projected growth for 2004-2016. These growth rates are reasonably similar to those adopted as part of the present study. The SFT deductions in the 2006 study were the same as those used in the 2003 Capacity Study.

- 3.18 The 2006 study found that there was sufficient comparison goods expenditure to support a total of 82,398 sqm (net) of additional comparison goods floorspace in Kingston town centre between 2002 and 2016. Table 2.1 below shows a comparison of the breakdown of need between the two studies across forecast years.

Table 2.1: Comparison goods floorspace need in Kingston town centre (sqm, net)

Comparison floorspace need (sqm net)	2003 Study	2006 Study
2003 to 2006	20,166	22,162
2006 - 2011	27,962	16,645
2011 - 2016	(Not assessed)	43,591
Total	48,128	82,398

Source: Kingston Retail Study Update (2006)

- 3.19 For convenience goods, the study identified a higher level of convenience goods floorspace provision than the 2003 study as a result of higher levels of per capita expenditure. Convenience goods need was identified for between 1,111 to 2,221 sqm net from 2002 to 2006, between 1,287 to 2,574 sqm net from 2006 to 2011, and further capacity for between 1,507 and 3,014 sqm net up from 2011 to 2016. This equates to capacity for between 3,905 and 7,809 sqm net between 2002 and 2016.
- 3.20 The study included qualitative recommendations for the improvement of Surbiton, New Malden and Tolworth, but did not specify the quantum of new floorspace required in these District Centres.

Surbiton, New Malden and Tolworth Comparison and Catchment Statistics (June 2010)

- 3.21 The Council commissioned Experian to analyse the comparison and convenience goods catchments for the Borough's District Centres of Surbiton, New Malden and Tolworth, both in terms of expenditure and population as well as socio-demographics and mosaic data. The study was not informed by a household assessment, and did not forecast the need for new floorspace in these centres over the plan period.

Retail Study Update (June 2010)

- 3.22 In February 2010, RTP was instructed by the Council to undertake a Retail Study Update which focused specifically on floorspace needs in Surbiton, New Malden and Tolworth. This update

follows and supplements the original Retail Study (January 2003), Retail Capacity Study (July 2003), and subsequent Retail Capacity Study Update (August 2006).

- 3.23 The study was informed by household survey data collected in 2002 and, as such, the conclusions should be treated with a degree of caution. The study undertook a bridging exercise between 2002 and 2010 to take into account changes in the retail composition and growth in expenditure in this period. Looking forward, for convenience goods expenditure the study adopted annual growth rates of 1.0% between 2010-16, 0.8% between 2016-21, and 0.9% between 2021-2026. These are reasonably similar to the rates adopted in the present study.
- 3.24 The study also made deductions of between 3.0% and 4.2% (between 2010 and 2026 respectively) to allow for special forms of trading. These are reasonably similar to the deductions taken into account as part of the present study.
- 3.25 Based on the adjusted 2002 convenience market shares for the three District centres, the study concluded that quantitative need for new convenience retail floorspace in the three centres was limited. Assuming District Centres retained a constant collective market share of 19.7%, forecast need in 2016 was 1,200 sqm (net) across the three district centres. This increased to 3,500 sqm (net) based on a modest 25% collective market share, and 7,900 sqm (net) based on an ambitious 35% market share. The study concluded that there was limited need for additional convenience floorspace in the short term under a constant market share approach; however, there was an opportunity for floorspace growth if an increasing market share was promoted.
- 3.26 The study also concluded that there was some qualitative to evidence support the case for additional convenience floorspace in the south of the Borough and, in a lesser extent, to the east of the Borough in order to reduce expenditure leakage and improve consumer choice.
- 3.27 No quantitative need assessment was undertaken for comparison goods floorspace.

Summary

- The primary retail evidence base which has informed the Adopted Core Strategy (2012) and Kingston Town Centre AAP (2008) consists of the Retail Study (January 2003), Retail Capacity Study (July 2003), Retail Study Update (September 2006) and Retail Study Update (June 2010).
- These studies were informed by a household telephone survey undertaken in 2002. As such, market shares will now be quite dated and may not reflect existing shopping patterns, particularly in locations where new retail development has occurred.

- These retail studies inform the retail allocations promoted in the adopted Kingston Town Centre AAP. As such, the floorspace figures promoted in the AAP will be out of date and may require amendment.
- For the District Centres, the retail evidence base is also dated. The 2010 Capacity Study was informed by household telephone survey data from 2002 and will therefore not fully account for changes in market shares as a result of changing shopping habits.
- None of the previous studies (in 2003, 2006 or in 2010) undertook a quantitative assessment of forecast need for comparison goods floorspace in the District Centres.

4. Retail Market Review and Town Centre Trends

4.1 Since the previous Royal Borough of Kingston Retail Study (June 2010), the UK economy and the retail sector have seen further on-going changes. To put our assessment of the quality of existing retail provision and the need for additional retail floorspace in to context, it is important to review the current retail market and social trends likely to influence future retailing in the study area. This ensures our approach and recommended strategy is relevant to the current retail market. Our review draws on published data sources, including research by Experian and Verdict.

4.2 This section also provides an analysis of relevant government research and town centre strategies which have come forward over the last few years, in response to the retail trends identified, to promote the consistent policy objective to seek to strengthen town centres.

Economic Outlook

4.3 Advice published by Experian (Retail Planner 10.1, September 2012) identifies that the UK economy is continuing to struggle following the recession as a result of weak domestic demand, declining disposable incomes, low levels of investment and reduced government spending. Household spending has been in decline since 2007. However, Experian expects that as inflation continues to ease steadily, household finances will gradually improve, reverting back to modest growth in 2013. Expenditure on retail goods has remained more resilient, with households cutting back on big ticket items, but continuing to spend on other items resulting in a rise in overall retail sales.

4.4 Over the short term, Experian expect economic growth to remain muted. Whilst there may be a modest revival in household consumer spending, this is likely to be balanced against poor retail growth. Looking at the outlook for the medium term, Experian predict annual average GDP growth of 2.3% between 2015 and 2019; which is less buoyant than before the recession due to tight government finance, household debt and higher levels of savings. Over the longer term the economy is predicted to improve slightly, however due to continuing fiscal restraint this growth is likely to be constrained.

4.5 Within London, the retail sector appears to be more resilient to the impacts of the recession than other regional and smaller centres. New retail developments on Oxford Street and Regent Street, including the opening of new flagship stores, as well as the opening of Westfield Stratford City, and plans for Brent Cross and Croydon, illustrate the significant confidence in Central London and the major Metropolitan centres.

Sales Efficiencies and Growth Rates

- 4.6 Comparison goods spending is expected to grow at a higher rate than convenience goods spending over the plan period. For comparison goods an expenditure growth rate of 1.4% between 2011 and 2012 has been applied, increasing to a 1.8% growth between 2012 and 2013, rising to a 2.8% growth per annum between 2013 and 2018, to a growth rate of 2.9% per annum post 2018. For convenience goods, spend has not grown between 2011 and 2013. However an expenditure growth rate of 0.5% per annum has been applied between 2013 and 2018 for convenience goods, increasing to 0.8% post 2018.
- 4.7 The sales efficiency growth rate represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (e.g. rent, rates and service charges) by increasing their average sales densities. Applying a turnover 'efficiency' sales density growth rate is a standard approach used in retail planning studies and has been used in this study in accordance with good practice.
- 4.8 Following the recession, many retailers have struggled to increase or maintain sales density levels and, together with other financial problems, this has led some retailers into administration. With the expectation of weak expenditure growth, sales density growth is also expected to be significantly lower than the high rates seen during the boom of the 1990s.
- 4.9 The trend towards the demolition of inefficient stores and the provision of more modern stores with higher and more efficient densities is expected to result in less scope to increase comparison goods sales densities over the longer term. Accordingly, Experian expect an efficiency growth rate for comparison goods of c. 2.1% between 2014 and 2019, falling to 1.8% post 2020. For comparison goods we have incorporated an efficiency growth rate of 2.1% per annum between 2013 and 2018, and a 1.9% per annum between 2018 and 2023, and 1.8% per annum between 2023 and 2028.
- 4.10 Scope for increased sales densities is much more limited for convenience goods because the majority of foodstores already drive high sales efficiencies. An efficiency growth rate of 0.1% per annum between 2014 and 2019, and 0.2% per annum post 2019 for convenience goods has been incorporated into our analysis.

Changing Retailer Requirements

Space Requirements

- 4.11 During the recession some independent retailer's margins have become too tight to survive and some multiple retailers have either collapsed or have shrunk their store portfolios after entering administration (recent high street retailers to fall in to administration include HMV,

Blockbuster, Jessops and Comet). This has led to a decline in the amount of occupied retail space in town centre locations. These losses have not been offset by new developments as many town centre schemes have been put on hold or scaled downwards during the recession. With online presence allowing national coverage, it is expected that retailers will remain cautious about store expansion.

- 4.12 Retailers are focusing their development programmes on the provision of larger flagship stores in strategic locations, supported by smaller satellite stores and transactional websites. The larger flagships accommodate the fuller range while smaller stores offer a more select range supplemented by internet kiosks allowing access to the wider range. This model of polarisation offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions.
- 4.13 The polarisation trend will result in larger dominant centres continuing to attract key retailers (where space is available), with a negative impact on smaller centres where stores may close. Subject to being able to provide suitable large units, Kingston is clearly well placed to benefit from these trends.

Out of Centre Retailing

- 4.14 As retailers opt to develop stores in the most strategic and cost effective locations, there has been a notable resurgence to out of centre destinations which offer benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out of town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out of centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.
- 4.15 Many traditional town centre retailers have developed an out of town store format, including John Lewis, who operate a number of 'At Home' stores in out of centre locations, and other retailers such as Next, Primark and H&M. This is in addition to their online offer (discussed later).

The Role of the Town Centre

- 4.16 The town centre has been the main shopping channel for the last 30 years. However, its future role is set to change dramatically. Emerging trends suggest that it will be used more for leisure and social activities with more bars, restaurants, food outlets and community spaces opening in vacant units. The delivery of additional non-retail uses in town centres will be secured through the changes to permitted development rights for a temporary two year period.

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- 4.17 As retailers improve their multichannel offer, town centre stores will be used more to support e-retailing with click and collect points and safe drop boxes for customers to collect their online orders as well as satellite stores opening for customers to make online purchases. As overall demand for retail floorspace declines, it is anticipated that more secondary and tertiary space which suffers from lower levels of footfall will increasingly be converted into alternative town centre and residential uses.
- 4.18 In order to ensure that town centres have a viable function moving forwards, it will be important for Councils to drive footfall and increase dwell time to improve awareness of offers and impulse purchases. This can be achieved by getting a better understanding of the catchment area and what local people want, improving the mix of retail and non-retail outlets in the town to make them stay longer, and making centres accessible.
- 4.19 It will be critical for Kingston to protect and enhance its non-retail offer to provide an attractive shopping and leisure experience that cannot be provided online. Accordingly providing an enhanced food and beverage offer, cultural attractions and events in Kingston and the district centres will become increasingly important over time.
- 4.20 For town centres such as Kingston, it will be important to maintain a 'unique selling proposition' to differentiate from the competition and encourage people to continue to visit. In contrast to purpose built centres like Westfield London, the heritage assets, historic market place, and riverside are all key attributes which can differentiate the centre.

The Internet, Multichannel Retail and Technology

- 4.21 Online shoppers in the UK account for 77% of all internet users, and in 2011 it was estimated to represent 30.7 million online shoppers¹. In 2008 retail growth rates peaked at 30% growth and since then the market has matured, with most retailers now having an online presence. Between 2012 and 2017, Verdict anticipates that online sales (as a share of retail spend) will grow from 10.5% to 14.9%. By 2017, Verdict estimates that the online retail market will be worth almost £50 billion, with one pound in every seven that is spent on retail accounting for online sales².
- 4.22 The growth in online sales will reduce the need for so many bricks and mortar stores. However, the growth in multi-channel retailing (including click and collect services), will ensure that the need remains for some physical stores. High streets will need to compete with the choice that

¹ Verdict Research, "e-Retail in the UK 2012", September 2012

online retailing provides. This will not only be driven by the price and range of products, but also by service and expertise. Online shopping has driven expectation of convenience and service upwards and customers now expect more from in-store ambience to tempt them to make a purchase³. Town centres and high streets will increasingly have to provide a shopping 'experience' that the internet is unable to match.

- 4.23 Trends indicate that the online and in-store shopping channels are becoming gradually more blurred as shoppers increasingly research purchases online or in stores before making purchases. According to Verdict, in 2010 63% of shoppers researched goods online before purchasing in store (an increase from 54% in 2007). At the same time, it is estimated that 29% of customers research purchases in store before buying online, representing a high increase from 13% in 2007⁴.
- 4.24 Within the clothing, footwear, food and furniture sectors, major opportunities remain for internet sales growth. Key drivers of growth include more sophisticated online offers from retailers, increasing consumer confidence in e-retail, the increase in click and collect services and the continued growth of smartphone and tablet devices.
- 4.25 M-commerce (sales through mobile devices), will become increasingly important as the usage of tablet computers continues to grow. Verdict predicts that m-commerce will account for 22% of the online market by 2017 (in 2012 m-commerce sales only account for 7% of online sales). New technologies such as QR Codes (Quick Response Codes) have increased consumer and retailer interaction, enabling customers to scan QR barcodes on their mobile phones to gain direct access to the product website.
- 4.26 While the internet and new technologies pose challenges to the high street, retailers are constantly looking for ways to exploit trading opportunities available through offering a multichannel shopping experience. The advantages of physical stores, in terms of the overall shopping experience and immediacy of products, will see a network of key stores remain a fundamental component of retailer's strategies to provide an integrated multichannel retail proposition.

² Verdict Research, "UK Online Retail Annual Forecasts 2012-2017", November 2012

³ Verdict Research, "How Britain Shopping: Overall 2011", March 2011

⁴ Verdict Research, "UK e-Retail 2011", May 2011

Retail Sector Trends

Food and Grocery

- 4.27 Despite on-going space expansion by the Big Four supermarkets, sales volume growth is anticipated to decline as retailer coverage reaches peak levels. In 2011, Tesco and the Co-operative gained a presence in every postcode in the UK. As a result retailers are likely to cut back on levels of expansion and focus on redevelopment and refurbishment of existing stores, with the remaining expansion focusing on areas of under representation where there can be gains in market share.
- 4.28 Developing smaller store formats for top up food shopping will also become increasingly popular in response to consumers seeking to reduce waste by moving from weekly shops to frequent smaller shops, or being discouraged from travelling long distances by high fuel prices. Following in the path of Tesco and Sainsbury's, Asda, Morrisons and Waitrose are all expanding smaller concept stores, with Morrisons recently acquiring 49 Blockbuster stores to open their new M Local convenience format stores. Food retailers will continue to develop online offers to meet increasing consumer demand for convenient food shopping, whilst click and collect services will ensure that online customers are brought in to stores⁵.

Clothing and Footwear

- 4.29 In 2015, Experian estimate that the clothing and footwear sector will represent 15.7% of all retail spend (increasing slightly from 14.7% of retail spend in 2010). Low levels of consumer confidence in addition to high prices are expected to keep clothing and footwear sales volumes low. Premium and luxury brands will continue to maintain their consumer appeal, encouraging sales through their quality products. Growth from value clothing and footwear retailers will become more subdued as they seek to ensure their profitability⁶.

Premium and Luxury Goods

- 4.30 More affluent consumers have been able to maintain a higher level of personal and discretionary spending during the recession and therefore the premium and luxury goods sector has remained relatively strong and resilient in comparison to other retail sectors.

⁵ Verdict Research, "UK Retail Forecasts to 2015", February 2012

⁶ Verdict Research, "UK Retail Forecasts to 2015", February 2012

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- 4.31 In addition Verdict consider that the premium sector of the UK department store market will account for 43% of total department store expenditure in 2017 reflecting the trend for midmarket department stores to provide more luxury products (e.g. John Lewis and House of Fraser). In Kingston, this is also illustrated by the evolution of the offer of The Bentall Centre.

Electronics

- 4.32 The electronics sector is set to face continued pressure and further decline over the short term as a result of the unwillingness of consumers to spend on electrical items. In this climate, retailers at the value end (e.g. supermarkets) and premium/aspirational end (e.g. Apple or John Lewis) of the market will be the most successful, whilst mid-range retailers will continue to be squeezed. Apple, for example, has recently expanded its representation in Kingston.

Homewares

- 4.33 Growth in the homeware market has been heavily reliant on the recovery of the housing market which has remained weak and growth in this sector is expected to remain largely stagnant until 2014. Limited disposable incomes have limited spending power and has caused more people to stay at home which has encouraged spending on lower price homeware items as people see to make the home more enjoyable to use and entertain in.

Music, Video and Books

- 4.34 Overall the music and video sector size has shrunk by a quarter since 2006, while online sales have doubled. As a result of an increase in music and video streaming (e.g. Spotify and Netflix), Verdict expect that online music and video sales will reach saturation point by 2016, by which point online sales will account for 97% of sector sales.
- 4.35 Online is expected to overtake in-store book sales by 2016, and Verdict predict online sales will account for 70% of total book spend. Growth in this sector will be largely driven by the increased uptake of e-reader devices (e.g. Kindle), and the lower price of e-books compared to hard copies. Book shops will become increasingly reliant on driving customer loyalty and hosting in store events to increase dwell time.

Relevant Government Research

The Portas Review (December 2011)

- 4.36 In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street, in response to the effects of the recession on the retail industry and local high streets in particular.

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- 4.37 The report suggested measures to tackle the further decline of the high street. Amongst 28 separate recommendations in the report, there is a call to strengthen policy in favour of 'town centres first' following the publication of the draft NPPF. In summary the recommendations aim to:
- Run town centres like businesses: by strengthening the management of high streets through 'Town Teams', developing the BID model and encouraging new markets;
 - Get the basics right: by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to remove red tape on the high street;
 - Level the playing field: by ensuring a strong town centre first approach in planning, introducing Secretary of State 'exceptional sign off' and encouraging large retailers to show their support for high streets by mentoring local businesses;
 - Define landlords' roles/responsibilities: by looking at disincentives for landlords leaving properties vacant, empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
 - Give communities greater say: by including the high street in neighbourhood planning and encouraging innovative community uses of empty high street spaces.
- 4.38 The Government published its formal response to the Portas Review in March 2012, which accepted the majority of Portas' recommendations. It announced that 'Portas Pilot' towns will set up Town Teams to create plans for the future of their high streets. In addition, the Government will provide investment to help Business Improvement Districts (BIDs) access loans for set-up costs and funding for a Future High Street X-Fund (now rebranded as the High Streets Renewal Fund) to reward towns which are delivering innovative plans to bring their town centres back to life. The Government also supports a National Market Day in June and plans to double small business rate relief.
- 4.39 The Government supports community involvement in the redesigning the concept of their high streets to reinvigorate areas of decline, to increase footfall and encourage people to live in town centres. However, the Government did not support the call to introduce Secretary of State 'exceptional sign off' for all new out-of-town developments and require all large new developments to have an 'affordable shops' quota. The Government states that LPAs are best placed to understand local needs and 'exceptional sign off' is contrary to the Government's ethos of devolution. As such, the Government will continue to use the call-in power sparingly.
- 4.40 During May and June 2012, the Government designated 27 Portas Pilot towns throughout England, which each receive funding of up to £100,000; a dedicated contact point in government to provide advice and support; free support from retail industry leaders, including
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Mary Portas' team and other sector experts; and the opportunity to meet and discuss with fellow pilots to share experience. One year on, a Freedom of Information request revealed that only 13% of funds had been spent in the pilot towns by March 2013, indicating that putting innovative schemes into action is difficult, and the majority of the Portas pilot towns have faced increasing vacancy rates over the last year.

- 4.41 The Future High Street Forum has been set up by central Government to seek to; relax planning restrictions in order to increase flexibility of pop up shops in empty units, facilitate better parking provision and encourage the online offer alongside (rather than instead of) high street stores. In May 2013 the Government identified seven towns across the country to receive a share of the £1m High Street Renewal Fund including Herne Hill in London. Funds will be put towards innovative ideas to revitalise town centres.

Understanding High Street Performance (December 2011)

- 4.42 The department for Business, Innovation and Skills (BIS) published a report exploring factors impacting on the economic and social performance of town centres and high streets. The study identifies key issues that the public, private and third sectors need to take into consideration when taking action or investing in high streets. The study identifies a range of influencing factors which have stimulated and affected change on the high street:

- Externalities – despite planning policies to protect town centres, high levels of retail and landlord debt and public spending cuts have squeezed consumer spending;
- Spatial and Physical Factors – large format stores, accessible by car and where shopping is done under one roof, dominate the market to the detriment of traditional high streets.
- Market Forces – the growth in market share of out-of-centre shopping centres, major supermarkets and retail parks in comparison to town centres, demonstrates that consumers are voting with their feet; and
- Management – high streets are difficult to manage and as a result are disadvantaged compared with supermarkets and shopping centres.

- 4.43 The study states that for retail based high-street performance the broad market indicators suggest this will continue to be increasingly challenging. Town centres will continue to be impacted by the growth in out-of-centre retail, supermarkets non-food sales, and the internet. It is emphasised that the high street of the future will need to differentiate itself from shopping centres, as a social space with a range of functions.

- 4.44 The report concludes that the traditional high street faces a number of challenges, not least from the tightening of retail spend and changing consumer behaviour, but also from increasing

competition posed by the internet and out-of-centre developments. Whilst the future is uncertain, strategies which support the high street are considered ever more vital.

Summary

- Economic growth will continue to remain muted over the plan period, however the performance of London remains relatively resilient.
- It is evident that the traditional high street faces a number of challenges, not least from the impacts of the recession, including tightening of retail spending and changing consumer behaviour, but also from increasing competition posed by the internet, multichannel retailing and out of centre developments.
- Town centre strategies which support the high street are considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay. The enhanced role and offer of food and beverage provision in Kingston and the district centres will be crucial over the plan period.
- It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period.
- It will be crucial for the town centres in the Borough to reaffirm their unique selling points which differentiate their retail offer from other centres and to encourage shoppers to maximise dwell time to reinforce the need for bricks and mortar stores.
- The on-going pattern of polarisation suggests that centres like Kingston are well placed to maintain and enhance their offer. However, this is dependent on continued investment and evolution of Kingston's retail offer.
- Sector trends show growth in premium luxury retail, and decline in books and electricals. In Kingston, the last major development took place in the early 1990's, and the centre needs to enhance both its 'mainstream' and its higher end 'aspirational' offer.

5. Sub-Regional Context

- 5.1 This section reviews the context of the Borough's centres in the wider sub-region, and the Borough's relationship with the key competing centres. The section specifically examines the influence of key competing strategic centres on the current and future role of Kingston town centre. The main retail offer and floorspace provision in each competing centre, and the extent to which this is likely to change and influence shopping patterns in the sub-region is also considered.

Competing Centres

Market Shares and Shopping Patterns

- 5.2 The household telephone survey undertaken in April 2013 to underpin this study identifies that the Borough's main competitors are the West End, Westfield London (White City), Wimbledon, Sutton, Croydon, Richmond, Hounslow, Epsom and Staines. The centres of Guildford, Twickenham, Sunbury on Thames, Ashford, Leatherhead, Wandsworth, Walton on Thames and Weybridge also compete with the Borough to a more limited extent. Further detail about the household telephone survey is provided in more detail in Section 8.
- 5.3 Shopping patterns derived from the household telephone survey (2013) allow us to calculate the amount of comparison goods expenditure that each competing centre draws from the survey area (trade draw). The level of this trade draw takes into consideration the strength of the retail offer of these competing centres, as well as their accessibility and distance from Kingston.
- 5.4 On review of the 2013 household telephone survey results, we consider that the results are likely to have overestimated the amount of spend being drawn to Kingston town centre. It is likely that respondents to the household telephone survey who state they shop in Kingston town centre do undertake the majority of their shopping within Kingston, however this does not preclude occasional, and potentially high value 'one-off', purchases being undertaken in the West End during the working week. In practice, we expect that the proportion of spend being drawn to large competing centres, such as the West End has been understated in the 2013 household telephone survey results.
- 5.5 To reflect the proportion of spend being drawn by alternate shopping destinations we have factored in a first choice and second choice weighting for clothes shopping destinations (explained in further detail in Section 8). The total comparison goods expenditure flowing to these centres is set out in Table 5.1 below (Appendix 3, Table 5 and 5a and illustrated in Plan 9).

Table 5.1: Study area Comparison Goods Trade Draw: Key Competing Centres

Centre	£(000s)	Trade Draw (%)
Kingston	1,544,630	34.1%
West End	380,601	8.4%
Wimbledon	218,085	4.8%
Sutton	190,091	4.2%
Richmond	171,912	3.8%
Staines	106,461	2.4%
Hounslow	104,877	2.3%
Epsom	104,786	2.3%
Croydon	103,003	2.3%
Westfield London	100,999	2.2%
Walton on Thames	66,802	1.5%
Guildford	59,297	1.3%
Wandsworth	44,167	1%

Source: GVA Household Telephone Survey, April 2013 (Appendix 3, Table 4 and 5)

- 5.6 Table 5.1 clearly demonstrates that Kingston town centre is retaining a very high level of trade retention within the household telephone survey area (34% market share). The most dominant competing centre in terms of comparison goods trade is the West End, which draws circa £380.6m of comparison goods expenditure (8%) out of the survey area.
- 5.7 Competing Metropolitan centres of Sutton, Hounslow and Croydon draw 4%, 2% and 2% respectively. The proximity of these Metropolitan centres to Kingston is illustrated in Plan 3. However, these centres have their own distinct and defined catchment areas (as illustrated in Plan 4). These centres do have an influence on shopping patterns in the Kingston survey area, and therefore their performance over the plan period is of significant relevance to Kingston town centre.
- 5.8 The major centres of Wimbledon and Richmond draw market shares from the survey area of 5% and 4%. Although these centres have particularly high comparison goods market shares within their own survey zones, their more contained catchment area reflects their more limited offer, and this is consistent with their position in the retail hierarchy.

Catchment Areas

- 5.9 We have analysed the origin of visitors to Kingston town centre (Appendix 3, Table 5b and Plan 2). This indicates that Kingston town centre draws 28.0% of visitors from the south, 25.5% from the north, 24.7% from the west and 21.7% from the east. This will have a bearing on traffic and parking capacity.
- 5.10 In the northern area, Kingston retains a 27% market share, whilst the West End draws 17%, Richmond 9% and Westfield London (White City) and Wimbledon both draw 5%. Westfield London only has a significant draw from the northern zones. In the eastern area, Kingston retains a 32% market share, Sutton draws 17%, Wimbledon draws 13%, Croydon draws 7% and the West End draws 6%.
- 5.11 In the southern zone, Kingston has the dominant market share, drawing nearly half of available expenditure within this area (46%). Epsom has a market share of 11%, Guildford draws 6% and the West End draws 4%. In the western survey zones, Kingston achieves a market share of 36%, Staines draws 10%, Hounslow draws 9%, Walton on Thames draws 4% and the West End, Westfield London, Richmond and Twickenham all draw 3% market share.

Benchmarking

- 5.12 This section examines the retail performance of Kingston in the context of the retail network across the wider sub region. Our analysis draws on Javelin Group's Venuescore Retail Rankings, which provides an up to date ranking of shopping venues across a range of key indicators.
- 5.13 Javelin evaluate each venue in terms of their provision of multiple retailers – including anchor stores, fashion operators, non-fashion multiples. The score attached for each operator is weighted to reflect their overall impact on shopping patterns. For example, anchor stores such as John Lewis, Marks & Spencer and Selfridges receive a higher score than other smaller retailers.
- 5.14 Centres are also assessed against other attributes, including market positioning; age focus; fashion focus; fashionability of its offer; foodservice bias; comparison vs. convenience bias; anchor strength and shopping centre vs. high street dominance. The resulting aggregate score for each venue is called its Venuescore.

National Benchmarking

- 5.15 Table 5.2 below identifies how Kingston town centre is ranked against competing town centres, to provide an indication of how the centre is performing nationally. Note that London West End

is not included in the rankings as the centre outperforms all other city centres in terms of retail offer.

Table 5.2: Javelin Venuescore Retail Rankings

Centre	Rank (2013)	Previous Rank Position (2011)
Glasgow	1	1
Manchester	2	2
Birmingham	3	3
Leeds	4	6
Liverpool	5	4
Oxford Street	6	19
Nottingham	7	7
Brighton	8	8
Cardiff	9	10
Edinburgh	10	5
Newcastle Upon Tyne	11	12
Aberdeen	12	14
Norwich*	13	9
Reading*	13	18
Bristol	15	11
Belfast	16	16
Leicester*	17	13
Kingston Upon Thames*	17	20
Southampton	19	15
Bath	20	22

Source: Javelin Venue Score 2013 and 2011

Note: The number of centres included within the rankings change year on year and this can have a bearing on rank position over time.

* Joint Venuescore ranking

- 5.16 It is evident from Table 5.2 that with the exception of the West End, the highest ranked centres are Glasgow, Manchester, Birmingham, Leeds and Liverpool. Kingston is currently ranked at joint 17th position alongside Leicester when compared with all venues across the UK. Kingston's retail rank position has fluctuated between 13 and 21 since 2005 and peaked at 13 in 2007. During this period there have been no significant retail developments within Kingston town centre.
- 5.17 Centres which are closely comparable with Kingston town centre in terms of scale and offer include Bristol, Bath and Exeter. However, each of these centres has improved its retail offer over recent years. Bristol has jumped from 20th position to 15th since the development of Cabot Circus, Bath has risen from 27th to 20th position since the opening of Southgate and Exeter has gone from 34th position to 23rd since Princeshay opened.

London Benchmarking

- 5.18 Kingston's national ranking compares favourably with other London centres. Kingston town centre is identified as the fourth highest ranked London centre after London West End, London City and Oxford Street (see Table 5.3 below).

Table 5.3: Javelin Venuescore Retail Rankings

Centre	National Rank (2013)	Glam-Glum Index (Average = 100)
London West End	1	144
London City*	4	134
Oxford Street	*	120
Kingston Upon Thames	17	126
Westfield London	22	146
Croydon	24	100
Westfield Stratford City	30	132
Knightsbridge	40	182
Covent Garden	41	141
Sutton	79	96
Brent Cross	84	132

Source: Javelin Venue Score 2013

*London City comprises retail within the jurisdiction of the City of London

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- 5.19 The Glam-Glum Index used by Verdict assesses the relative market position of a venue where 100 defines the average UK retail venue. Scores above 100 reflect a bias to the aspirational market; scores below 100 reflect an orientation towards the discount/value end of the market.
- 5.20 At large, Central London's retail offer has a clear focus on high end retail. This is exemplified by the Glam-Glum Index scores that are well above 100 for the vast majority of Central London venues. The Glam-Glum Index peaks at Knightsbridge with a score of 182, which is positioned at the top of the luxury retail offer.
- 5.21 Kingston's retail offer does not compete well in terms of quality, luxury and price index of upscale retailers. Centres such as Covent Garden, Angel, Brent Cross and Westfield London all have a lower National Ranking but higher Glam-Glum Index in comparison to Kingston. Given the relative resilience of the more aspirational fashion and luxury goods sector, and Kingston's catchment profile, this is a significant deficiency.
- 5.22 In comparison to the Metropolitan centres of Croydon, Bromley, Romford, Sutton, Uxbridge, and Romford, Kingston has the highest Glam-Glum Index (126). The only venue outside Central London that has a higher Glam-Glum Index than Kingston is Richmond upon Thames (which achieves an Index of 142). However, with the prospect of further development in the West End, Croydon, Guildford and Brent Cross, Kingston needs to improve its aspirational retail offer.

Performance of Competing Centres

- 5.23 Table 5.4 below compares the identified competing centres in terms of scale and turnover. We then provide a brief overview of the performance of these centres and identify pipeline retail developments in these competing centres.
- 5.24 In terms of the performance of comparison goods only, Table 5.4 provides an overview of the scale of retail floorspace and turnovers of competing centres within London. These figures are the most recent comparable figures available for the largest centres in the sub-region from the Greater London Authority (GLA). The figures date back to 2006, and therefore the turnover assumptions and levels of comparison goods floorspace are likely to have changed since the report was undertaken. Notwithstanding this, the figures below indicate the scale of retail provision in the competing centres and Kingston's performance in relation to this in 2006.

Table 5.4: Performance of Key Competing Centres within London

Centre	Estimated Turnover (Note A)	Size (Comparison Goods) (Note B)	Designation (Note C)
West End	£4,179m	858,396 sqm	International
Kingston	£646m	169,489 sqm	Metropolitan
Croydon	£636m	180,531 sqm	Metropolitan
Sutton	£325m	95,782 sqm	Metropolitan
Hounslow	£269m	68,602 sqm	Metropolitan
Wimbledon	£240m	47,799 sqm	Major
Richmond	£196m	38,027 sqm	Major

Note A: Estimated turnover at 2006 taken from GLA Consumer Expenditure and Comparison Goods Retail Floorspace Need in London (March 2009)(Table 45 and Appendix 3)

Note B: Goad adjusted floorspace at 2006 taken from GLA Consumer Expenditure and Comparison Goods Retail Floorspace Need in London (March 2009)(Appendix 3, Table 3)

Note C: Town centre classifications taken from London Plan 2011 (Table A2.1)

- 5.25 A recent Retailscape study by Experian (May 2013) identifies which retail centres across the UK have the strongest market potential, identifying which areas have both robust consumer demand and a bright economic outlook. The report provides an analysis of retail locations by amount of retail spend, affluence of catchment area, overall economic resilience and how likely consumers are to spend online. Kingston town centre is identified as the third best performing centre in the UK as well as being the centre identified with the strongest market potential (see Table 5.5 below).

Table 5.5: Experian Retailscape Centres with Strongest Market Potential

Centre	Comparison Spend (£m)	Resilience of Catchment	Catchment in Mosaic Group Top Table	Likelihood to Buy Online*
1.London West End	£4,465	Above Ave.	10%	5
2.Edinburgh – Princess Street	£1,325	High	14%	6
3.Kingston upon Thames	£989	High	29%	10
4.Westfield London	£1,111	Above Ave.	9%	6
5.Cardiff	£1,102	Above Ave.	13%	8
6.Aberdeen	£940	High	19%	8

7.Milton Keynes	£947	Above Ave.	17%	9
8.Reading	£826	Above Ave.	25%	10
9.Trafford Centre	£992	Above Ave.	10%	4
10.Bromley	£721	Above Ave,	24%	8

Source: Experian, Retailscope, May 2013

*1= low likelihood to buy online, 10= high likelihood

- 5.26 The Experian Retailscope analysis identifies that Kingston has a comparison goods turnover of £989m and that the catchment of AB Mosaic Group population is significantly high in comparison to other strongly performing centres, such as Westfield London. The Kingston catchment is also very likely to shop online, which indicates that the catchment would be more supportive of multi-channel retailing, and that the centre will need to provide an attractive town centre retail and leisure offer to tempt shoppers to spend time in the town centre.
- 5.27 Table 5.6 below illustrates comparable prime retail rental levels between the key competing centres, It is evident that destinations in London West End (e.g. Oxford Street and New Bond Street), have historically attracted the highest prime rental levels, reaching c.£8,611 per sqm in 2012. Since opening in 2008, Westfield London has achieved the highest prime rental rates outside the West End (£3,498 per sqm at 2012), closely followed by Richmond and Guildford (which achieve average prime retail rents of £3,422 and £3,337 per sqm net respectively). Kingston town centre currently commands the sixth highest retail rental levels in comparison to the key competing centres.
- 5.28 Prime retail rental levels in the remaining centres are considerably lower than Kingston town centre, with Croydon being the centre with the next highest average rental levels at £2,368 per sqm.

Table 5.6: Net Prime In Centre Retail Rental Levels

	1987	2005	2006	2007	2008	2009	2010	2011	2012
Oxford Street (West)	3552	5382	5651	5705	5705	5705	6082	7535	8611
New Bond Street	2368	4359	5113	5651	5920	5920	5920	6458	8611
Westfield London	-	-	-	-	-	-	3229	3229	3498
Richmond	1076	2207	2153	2153	2153	1938	1938	2045	3422
Guildford	1076	2583	2583	2583	2691	2583	3014	3229	3337

Kingston-upon-Thames	1399	3175	3283	3337	3337	2960	2960	3229	3229
Croydon	1076	2906	2906	2906	2906	2368	2368	2368	2368
Wimbledon	484	1399	1399	1722	1722	1399	1507	1507	1453
Epsom	753	1238	1238	1238	1238	1130	1130	1076	1076
Staines	646	1346	1346	1346	1346	1130	1130	1130	1001
Hounslow	753	1076	1130	1130	1130	969	969	969	807
Sutton	861	1076	1076	1130	1130	753	753	753	807
Walton-upon-Thames	431	592	753	807	807	753	753	646	538

Source: Colliers, July 2012

- 5.29 Since 2005, average retail rental levels in Kingston upon Thames have grown, reaching a peak of £3,337 per sqm between 2007 and 2008. Following the recession, average rents in Kingston fell slightly to £2,960 per sqm net. However, as a result of Kingston's dominant position in the sub-region, and the lack of available or new modern floorspace, since 2010 Kingston's retail floorspace has remained in demand, resulting in rental growth. This is evidence that rental levels in Kingston are recovering from the effects of the recession, and are reinforced by the limited supply of modern space.
- 5.30 In contrast, in the centres of Epsom, Hounslow, Staines, Walton-on-Thames and Wimbledon, rental levels have declined since 2010, which indicates that these centres are continuing to struggle following the economic recession. Table 5.6 also illustrates that the centres with the highest current average rental levels (London West End, Richmond, Westfield London and Guildford) all currently have higher rental levels than before the recession, reflecting the continued strength of retail demand in these centres.

Profile of Competing Centres and Pipeline Developments

The West End

- 5.31 The West End (comprising Oxford Street, Bond Street and Regent Street) is a global shopping destination, and the leading retail destination in the country. The West End attracts c. 200 million visitors per annum, including UK and international tourists, workers and Greater London residents. The London Plan allocates the West End as an International centre, and the London Plan seeks to support the continued success of the West End over the plan period by protecting and enhancing their unique retail offer.
- 5.32 The West End is the largest competitor to Kingston upon Thames, and has a significant influence on retail shopping patterns across London and the south east. The West End provides numerous

flagship stores, including a range of high end luxury goods and designer fashion retail units including Burberry, Selfridges, Chanel, Tiffany and Co., Coach, Alexander McQueen and Louis Vuitton. The retail offer of the West End is unparalleled in contrast to the other key competing centres and the centre is expected to continue to dominate shopping patterns, particularly in the northern part of the survey area.

West End Pipeline Retail Developments and Retailer Requirements

- 5.33 Redevelopment proposals in the West End vary from refurbishment schemes (such as Debenhams flagship store on Oxford Street), to the redevelopment of properties in the eastern end of Oxford Street (the Quadrangle, The Plaza shopping centre and phase two of the Oriana block following on from the opening of Primark in 2012), and large development sites (such as the Royal Mail West End Delivery Office). Other development sites result from the Crossrail development including ticket halls and above ground development at Tottenham Court Road Station and Bond Street Station.
- 5.34 According to Co-Star Focus, in July 2013 there are 36 retailer requirements within the West End. The total floorspace requirement ranges between 5,038 sqm and 9,875 sqm. Retailers looking to locate within the West End include a mix of mid and high end retailers such as Fitness First Plc., Jonathon Adler, French Eye, Rush Hair, Sainsbury, Little Waitrose and Rituals.

Croydon

- 5.35 Croydon is the principal shopping centre in the London Borough of Croydon, and has a catchment area covering part of south London between Sutton in the west and Bromley in the east. The centre currently has a reputation for dated architecture and design. The Whitgift and Centrale shopping centres in the north of the centre are the main focus for Croydon's retail offer. The quality of the retail offer is low to mid market, with key retailers in the centre including BHS, Debenhams, H&M, New Look and House of Fraser.
- 5.36 Croydon is designated as a Metropolitan centre in the London Plan, and is also identified as an Opportunity Area. Croydon is identified as London's largest Metropolitan town centre. Despite having a higher level of comparison goods floorspace than Kingston town centre, Table 5.2 above indicates that Kingston achieves a higher turnover than Croydon. The London Plan seeks to support the Council's objective to re-brand the offer of Croydon and to rejuvenate the mix and vitality of the centre,

Croydon Pipeline Retail Developments and Retailer Requirements

- 5.37 The Croydon Opportunity Area Framework was adopted by the Council in January 2013. Outline planning permission was granted in March 2012, for a mixed use development at land

adjoining east Croydon Station (Gateway Site). The development comprises a maximum of 62,080 sqm floorspace, including 10,900 sqm retail (A1 – A5) floorspace proposed (ref. 11/00631/P). Various conditions are pending consideration.

- 5.38 There are longstanding plans to regenerate Croydon Town Centre. Westfield and Hammerson are currently at pre-application stages of redeveloping the Whitgift and Centrale Shopping Centres to comprise c. 140,000 sqm retail floorspace. A scoping opinion was approved for the Whitgift Shopping Centre in July 2012 (ref. 12/01518/DT).
- 5.39 Ongoing negotiations are also taking place over the retail and leisure development stretching from West Croydon Station to North End. The scheme is being developed by Croydon Council and the LDA.
- 5.40 The Co-Star Focus database identifies that in July 2013, there are 22 retailer requirements for Croydon town centre. The total floorspace requirement ranges from between 3,038 sqm and 5,156 sqm. Retailers looking to locate within Croydon town centre include mid market retailers such as Millies Cookies, Kathmandu UK, Farrow and Ball, Sabicki Homewares, Costa Coffee, Café Nero and Oxygen Red Ltd.

Sutton

- 5.41 Sutton is the principal shopping centre in the London Borough of Sutton, and has a catchment area covering part of south west London between Kingston in the west and Croydon in the east.
- 5.42 The shopping offer is focused in and around the linear High Street and there are also two indoor shopping centres (Times Square and St Nicholas Shopping Centre). Whilst the main shopping area comprises good quality buildings, there are also areas of very poor quality architecture which are dated in appearance. Similarly to Croydon, the retail offer at Sutton is tailored towards the low to mid market retailers including Debenhams, BHS, Next, Primark, TK Maxx and Sports Direct.
- 5.43 Sutton is designated as a Metropolitan centre in the London Plan. The London Borough of Sutton Core Strategy seeks to secure the major redevelopment and growth of Sutton town centre in order to tackle its relative decline as a shopping centre in south London.

Sutton Pipeline Retail Developments and Retailer Requirements

- 5.44 There are relatively small scale pipeline retail developments identified in Sutton. These include the demolition of existing buildings and erection of a 3 – 6 storey mixed use development at 324 – 340 High Street, Sutton (572 sqm retail floorspace proposed).

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- 5.45 In addition an application is pending for the redevelopment of the Azteque site at Sutton Court Road. The proposals include the provision of 1,978 sqm gross retail floorspace, 887 sqm gym, 139 hotel, office space and residential dwellings in a new tower development.
- 5.46 The Co-Start Focus database identifies that at July 2013, there are 15 retailer requirements within Sutton town centre. The total floorspace requirement ranges from between 2,917 sqm and 5,834 sqm. Retailers looking to locate within Sutton are mid end retailers including Frankie & Benny's, The Little Gym, Toni & Guy, Maison Blanc Ltd., Holland & Barratt and Topps Tiles.

Hounslow

- 5.47 Hounslow is the principal shopping centre in the London Borough of Hounslow, and has a catchment area covering part of west London between Ealing (to the north) and Kingston (to the south east). The town centre includes the Treaty and Blenheim shopping centres.
- 5.48 In terms of representation, previous retail studies have identified a strong qualitative deficiency in the centre in terms of large retail operators. Hounslow Metropolitan centre also struggles with poor quality shops. Asda is a strong convenience goods anchor in the town. Other key retailers are tailored towards the low-mid end market including Debenhams, Wilkinson, River Island and Dorothy Perkins. The quality of the shopping environment is also very dated and provides a poor quality retail offer.
- 5.49 Hounslow is designated as a Metropolitan centre in the London Plan, and it is also the smallest Metropolitan centre in terms of comparison goods floorspace (Table 5.2). The Council has identified that Hounslow is the worst performing of London's 11 Metropolitan centres. The Hounslow Preferred Options Core Strategy seeks to promote Hounslow town centre for leisure and economic activities and a stronger shopping offer to provide a high quality Metropolitan centre.

Hounslow Pipeline Retail Developments and Retailer Requirements

- 5.50 The London Borough of Hounslow has aspirations for a large town centre redevelopment project and are currently preparing a masterplan for the town centre. Aside from this, the main pipeline development in Hounslow town centre is for the development of a 8,000 sqm Tesco foodstore and smaller retail units at Hounslow House, London Road. In addition planning permission has been granted for the subdivision of a supermarket at Sunrise Plaza Bell Road to provide a new indoor market (4,700 sqm floorspace proposed).
- 5.51 The Co-Star Focus database identifies that there are 12 retailer requirements in July 2013 for Hounslow town centre. The total floorspace requirement ranges from between 2,262 sqm and

4,176 sqm. Retailers looking to locate within Hounslow include a mix of retailers such as Frankie & Benny's, Little Waitrose, Chiquito and Bonmarch.

Wimbledon

- 5.52 Wimbledon is the principal shopping centre in the London Borough of Merton, and has a smaller and more localised catchment area in comparison to the Metropolitan centres outlined above. In terms of the household telephone survey area, Wimbledon has the most significant influence on shopping patterns in the east of the survey area.
- 5.53 The main provision of higher order retail provision in Wimbledon is focused around the Centre Court Shopping Centre and The Broadway, which provide a relatively pleasant shopping environment. The town has a reasonable range of multiple and independent retailers for a centre of this size. Wimbledon is focused on a mid-market shopping offer, with key retailers including Debenhams, Elys, Gap, Jigsaw, Next and Waitrose.
- 5.54 Wimbledon is designated as a Major centre in the London Plan. The Merton Core Strategy identifies that the Council is seeking to ensure that Wimbledon continues to develop and maintain its position as a diverse Major centre offering excellent shopping, business and cultural facilities.

Wimbledon Pipeline Retail Developments and Retailer Requirements

- 5.55 There are longstanding plans to redevelop the Station area as well as the New Wimbledon Theatre car park. These sites are not subject to any extant planning consents at present.
- 5.56 The Co-Star Focus database identifies that in July 2013 there are 43 retailer requirements to locate in Wimbledon (including Wimbledon Village). The total retail floorspace requirement ranges between 33,383 sqm and 40,970 sqm. Retailers looking to locate within Wimbledon include mid end retailers such as Fitness First, The Little Gym, Card Factory, Aldo, Costa Coffee, Millie's Cookies, Ecco and Soletrader.

Richmond

- 5.57 Richmond is the principal shopping centre in the London Borough of Richmond upon Thames, and has a smaller catchment area than the Metropolitan centres. The primary catchment area of Richmond town centre is in the north of the survey area, extending from Sunbury in the west to Putney in the east. The main town centre offer is provided around George Street and The Quadrant. The riverside location and attractive historic architecture result in a very pleasant shopping environment.

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- 5.58 Richmond town centre provides a mid to high end retail offer, with a number of quality and designer retailers including Jigsaw, Reiss, Ted Baker, The Kooples and Space NK Apothecary.
- 5.59 Richmond is designated as a Major centre in the London Plan. The Richmond Core Strategy identifies that Richmond is performing very successfully. Planning policy seeks to maintain and reinforce Richmond town centre as the main retail destination in the Borough over the plan period. Retail improvement and revitalisation is directed towards Twickenham.
- 5.60 *Richmond Pipeline Retail Developments and Retailer Requirements*
- 5.61 Richmond town centre is very constrained, and nearly all of the town is within a Conservation Area. A Wholefoods store at George Street is due to open in autumn 2013. There are very few opportunities for significant new retail development in the town centre.
- 5.62 The Co-Star Focus database identifies that in July 2013 there are 40 retailer requirements to open stores in Richmond town centre. The total floorspace requirement ranges between 40,537 sqm and 62,233 sqm. Retailers looking to be located within Richmond include a mix of mid and high end retailers including: the White Company, Costa Coffee, Premier Inn, Maplin, Frankie and Benny's, Sainsbury, Kathmandu Ltd, Matalan and Hotel Chocolat.

Westfield London (White City)

- 5.63 Westfield London shopping centre opened in 2008 and is incorporated within the London Plan designation of Shepherd's Bush as a Metropolitan centre. The new purpose built shopping centre poses competition to traditional town centres, which struggle to provide coordinated management, single branding and marketing, extensive car parking and customer services. The Village at Westfield provides luxury premium designer brands including Mulberry, Jimmy Choo, Gucci, Jo Malone, De Beers Jewellery, and Aquascutum.
- 5.64 Westfield London has the largest influence on shopping patterns in the north of the survey area, however the extent of this is reasonably limited (5% market share within the northern area). Westfield has planning consent for a 5,500 sqm extension to the shopping centre, to be anchored by John Lewis. This will provide expand the comparable offer to Kingston, and is likely to reduce Kingston's market share from this part of its catchment.
- 5.65 Retailer requirements for Westfield London are not available on the Co-Star Focus database. The most recent Experian Goad data for Westfield London (July 2012) indicates that the shopping centre has a vacancy rate of 4.5%. Westfield London is a prime retail location, which is demonstrated by the strong rental levels commanded by the centre. The high occupancy rates reflect the strength of demand from international retailers to trade from the centre, and therefore we anticipate that retailer demand in the centre is high.

Staines

- 5.66 Staines is the principal town centre in Spelthorne Borough Council. The town's primary catchment extends from Feltham in the east and Chertsey and Egham to the west and south. The shopping centre is focussed on the High Street, the Elmsleigh Centre and the Two Rivers Centre. Staines provides a mainstream shopping offer including Debenhams, BHS, Matalan, Marks and Spencer, Waitrose and Sports Direct.
- 5.67 Staines has the most influence on shopping patterns in the west of the survey area, capturing 10% of available spend within this zone. The Council are seeking the continued improvement of Staines as the main town centre serving north Surrey. We are not aware of any extant planning consents in Staines town centre, although the Elmsleigh Centre has plans to extend further.
- 5.68 The Co-Star Focus database identifies that in July 2013, there are 15 retailer requirements within Staines town centre. The total floorspace requirement ranges between 7,131 sqm and 18,416 sqm. Retailers looking to be located within Staines include low to mid range retailers such as Pret a Manger, Shoe Zone, Iceland, Bathstore, Topps Tiles and Millies Cookies.

Epsom

- 5.69 Epsom town centre is the main town centre in Epsom and Ewell District, at the same retail hierarchy position as Camberley, Staines and Woking. Epsom has a predominantly mid-market retail offer with retailers represented in the centre including Waitrose, Marks and Spencer, TK Maxx, Wilkinson, Boots, House of Fraser and Next. The main retail provision is located on the High Street and The Ashley Centre.
- 5.70 Epsom has the largest influence on shopping patterns in the southern area of the survey area, drawing an 11% market share in this survey area (within which it is located). The Council seek to improve Epsom town centre, and encourages new development to reinforce its role. We are unaware of any extant or pipeline applications coming forward in the town centre.
- 5.71 The Co-Star Focus data base identifies that at July 2013 there are 17 retailer requirements to open stores within Epsom town centre. The total floorspace requirement ranges from 3,775 sqm to 9,036 sqm. Retailers looking to locate within Epsom include mid end retailers such as Frankie and Benny's, Pret a Manger, Costa Coffee, Millies Cookies, Topps Tiles, Hatton Goldsmiths, Phase Eight and Traid.

Walton on Thames

- 5.72 Walton on Thames is designated as the main town centre in Elmbridge, However, the centre is very small in scale in comparison to the other competing centres. Walton on Thames provides a

reasonably pleasant shopping environment, with key retailers including Sainsbury's, Next, Waitrose, Wilkinsons and New Look providing a mainstream shopping offer.

- 5.73 Walton on Thames draws small market shares from both the southern and western survey area (3% and 4% respectively), reflecting the centre's location close to the boundary of these centres. Over the plan period the Council are seeking to encourage town centre development to add to the vitality and vibrancy of the centre. We are not aware of any extant planning consents in the town centre or pipeline developments.
- 5.74 The Co-Star Focus database identifies that at July 2013, there are 10 retailer requirements within Walton on Thames town centre, the lowest number of retailer requirements of all the key competing centres. The total floorspace requirement for Walton on Thames is for between 2,713 sqm and 5,086 sqm. Retailers looking to located within Walton on Thames include mid end retailers such as David Lloyds, Vets4Pets, Café Copia, Hatton Goldsmiths, Traid, Matalan and Neals Yard remedies.

Guildford

- 5.75 Guildford is the principal shopping centre in Surrey, drawing a strong catchment from the wider area. Guildford benefits from an attractive historic environment which provides an attractive retail destination. The main retail core in Guildford is focused around the historic High Street, the Friary Centre and Tunsgate Square. The centre has a strong retail offer including three department stores (House of Fraser, Debenhams and Marks and Spencer), as well as mid to high end comparison goods stores including Heal's, Urban Outfitters, TM Lewin, Gap, Hobbs, Armani Exchange and Kurt Geiger.
- 5.76 Guildford draws a 5% market share from the southern survey area, illustrating the relatively strong and wider catchment area of the town. The Council seek to retain the attraction of Guildford town centre over the plan period. There have been longstanding proposals in the town centre to extend the Friary Centre. It is understood that there is interest from department store operators (including John Lewis, Selfridges and Harvey Nichols) to develop a new store as part of the Friary Centre extension, however no planning application has been submitted at present.
- 5.77 The Co-Star Focus database identifies that there are 62 retailer requirements in Guildford. The total floorspace requirement ranges from 9,229 sqm and 18,533 sqm. Retailers looking to locate within Guildford include Whittard of Chelsea, Vets4Pets, Warren James, Topps Tiles, The Little Gym, The Fragrance Shop, Tog 24, Sweaty Betty, Phase Eight, Oxygen Red, Kathmandu and Curzon Cinemas.

Summary

- The household telephone survey (2013) has identified the West End, Wimbledon, Sutton, Richmond, Hounslow, Staines, Epsom, Croydon and Westfield London as the main competing centres to Kingston town centre. Walton on Thames, Guildford and Wandsworth also compete, but to a more limited extent.
- The West End is defined as an International centre in the London Plan. Taking into consideration the scale, nature and extent of retail offer in the West End, it is not surprising that the centre has an influence on shopping patterns across the survey area, particularly in the north of the survey area.
- Kingston has the strongest retail offer of all the Metropolitan centres, but it offers a limited range of new and aspirational retailers in comparison to those found in new centres e.g. Westfield London. Without new development, and attracting more aspirational brands to meet customer expectations, Kingston's current prominent position outside Central London will be lost.
- Kingston's average retail rents peaked at £3,337 per sqm in 2007/2008. Rents fell during the recession, but are now showing signs of recovery, and are almost comparable to pre-recession levels. This reflects the strength of the centre, strong retailer demand, and the limited supply of modern quality space.
- Kingston is identified as having a very affluent catchment area, and is considered as being one of the top three centres in the country in terms of strongest market potential. However, it has attracted no major retail development for twenty years, and its offer is becoming dated, while the West End and competing centres like Croydon are attracting significant new developments.
- The national retail ranking of Kingston has fluctuated over the last decade, but overall has remained the same. Similar sized centres such as Bath, Bristol and Exeter have all managed to increase their retail rank over the same period as a result of significant town centre investment.
- Analysis of the sub-regional competing centres identifies that there are several town centre development schemes and retail extensions proposed over the plan period. This will curtail Kingston's trade draw from their core catchments, and provide further competition for trade in the hinterland areas like Wimbledon.
- Accordingly, Kingston cannot afford to be complacent about its current ranking and in the wider retail hierarchy, it will be critical to secure new development providing modern, quality floorspace, to improve the environment and accessibility of the centre and to evolve Kingston's wider offer if it is to retain its current position.

6. Kingston Town Centre Audit

6.1 An in depth town centre audit of Kingston town centre was conducted in March 2013, based on the results of the 2013 household telephone survey, a site visit and desktop research. This section provides details of previous performance according to past retail studies, a summary of the current position of Kingston town centre and an assessment of the retail frontage provision within the centre. Appendix 1 provides a detailed analysis of key development sites in Kingston town centre.

Conclusions of Previous Retail Studies

6.2 Before assessing the current performance of Kingston town centre, we analyse the findings of previous retail studies. Retail Studies in 2003 and 2006 have considered the performance of Kingston town centre and the opportunity for further retail and service development.

6.3 The 2003 retail studies found that Kingston was one of the largest and most successful shopping centres in Greater London outside of the West End. The town centre supported 230,000 sqm gross of retail and service floorspace. The 2003 Retail Study identified there were no significant retail developments between 1992 (The Bentall Centre) and 2003, unlike surrounding competing centres such as Croydon which experienced major expansion in its retail floorspace at Centrale and Whitgift shopping centre, comprising an additional 70,000 sqm gross retail floorspace. Leisure developments at Charter Quay and Rotunda were identified to have significantly improved the leisure offer within Kingston by introducing 'good quality restaurants and bars'.

6.4 The main problems identified in Kingston town centre in 2003 were related to poor accessibility and traffic congestion. In addition the report identified that the shopping environment was poor and unwelcoming, particularly at the Market Place and bus and train stations. However, in comparison to competing centres (such as Epsom, Hounslow and Wimbledon) Kingston was considered to meet residents shopping needs very well.

6.5 The retail studies recommended the following improvements;

- An expansion to the retail floorspace of Kingston town centre;
- The need to improve accessibility to the town centre by all modes of transport;
- The need to alleviate car parking problems;
- The need to promote linkages between shopping and leisure activity; and
- The need to improve the shopping environment.

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- 6.6 The 2003 Retail Study identified that Kingston town centre could accommodate significant growth in retail floorspace, to allow modern large retail units to be accommodated. The study states that expansion of the centre is constrained by the ring road and the River Thames.
- 6.7 In terms of capacity for convenience goods, the 2003 Retail Capacity Study concluded that growth would be more limited and the centre should plan for somewhere between 1,300 and 1,700 sqm (net) new floorspace by 2011.
- 6.8 The 2003 Retail Capacity Study identified capacity for an additional 20,000 sqm gross comparison goods floorspace to 2016 and a further 28,000 sqm to 2011 within Kingston town centre. The 2006 Retail Capacity Update identified additional capacity for comparison goods in Kingston, estimating a comparison goods need of 82,398 sqm net between 2002 and 2016. The following locations were identified to accommodate this floorspace;
- South side of Clarence Street to Eden Street;
 - North side of Clarence Street bounded to the east by Castle Street;
 - North side of Clarence Street bounded by the ring road; and
 - Land at Ashdown Road.
- 6.9 Ashdown Road was identified as the only opportunity in Kingston town centre for significant scale retail floorspace expansion. The study states that this site has the potential to provide 27,000 sqm gross (19,000 sqm net) additional floorspace. The sites surrounding Clarence Street identify opportunity for 17,500 sqm gross (12,200 sqm net) additional floorspace.

Kingston Town Centre Audit 2013

- 6.10 Kingston town centre provides a mix of retail, leisure, civic, cultural and academic facilities, including Kingston University and Kingston College. In 2012 there were over 23,000 students studying at the University, and the student population in Kingston is a key influence on the dynamic of the town centre.

Existing Provision/Composition

- 6.11 Kingston town centre comprises 209,576 sqm net floorspace of retail and service uses, of which a strong comparison goods offer reflects the role of the centre. Table 6.1 and 6.2 set out the composition of convenience, comparison, service and vacant units within Kingston town centre. There is an above the national average representation of comparison goods retailers, and a below average representation of convenience and service units, as we would expect in a Metropolitan centre.

Table 6.1: Kingston Town Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	30	5.50	8.13	-2.63
Comparison	263	48.26	33.29	14.97
Service	223	40.92	47.08	-6.16
Vacant	29	5.32	11.34	-6.02
Misc.	0	0.00	0.16	-0.16
Total	545	100	100	

Source: Experian Goad Category Report (December 2012)

Table 6.2: Kingston Town Centre Composition of Uses (Floorspace sqm net)

	Floorspace (sqm net)	% of Total	UK Average (%)	Variance
Convenience	6,105	2.91	14.69	-11.78
Comparison	164,739*	78.61	36.97	41.63
Service	34,064	16.25	39.06	-22.81
Vacant	4,668	2.23	9.15	-6.92
Misc.	0	0.00	0.13	-0.13
Total	209,576	100	100	

Source: Experian Goad Category Report (December 2012)

*Comparison goods floorspace taken from RBK Shop Survey Data 2001.

- 6.12 The convenience goods offer within Kingston town centre is predominantly comprised of three foodstores; Waitrose, Marks and Spencer and Sainsbury's. These stores are relatively small with a dated store format, particularly the Sainsbury's at Eden Walk. The Waitrose and Marks and Spencer foodhalls form part of larger department stores.
- 6.13 In addition there are two other foodstores within close proximity to the town centre; Sainsbury's at Sury Basin (edge of centre) and Asda at London Road (out of centre) (discussed in Section 7).
- 6.14 The comparison goods retail provision comprises c.164,739 sqm net and is predominately located within The Bentall Centre, Eden Walk, Clarence Street and the Historic Core.

Approximately 70% of the comparison provision is made up of multiple retailers and London Road provides the main provision of independent 'boutique' retailers.

- 6.15 The comparison goods offer in Kingston town centre is tailored towards the mid/mass market, with retailers including Monsoon, Primark, H&M, Superdry, Next, Millets, JD Sports and Wilkinson all operating within the centre.
- 6.16 There is a notable gap in the provision of more luxury and aspirational retailers. The limited high end offer currently focuses around the Historic Core/Market Place and The Bentall Centre. Retail units for more premium comparison goods retailers such as Karen Millen, Whistles, Tommy Hilfiger and Reiss, are generally small and do not meet modern retailer requirements.
- 6.17 Service units are sub-divided into three categories by Experian Goad; Retail, Leisure and Financial and Business Services. The provision of service units and floorspace within Kingston is below the national average, however there is a strong proportion of health and beauty retail units, whilst there is an under provision of property, legal and financial services.
- 6.18 The proportion of food and drink establishments (Class A3/A4/A5) within Kingston is also low, particularly in relation to the level of floorspace provided, which indicates that existing eating and drinking units are currently of a small scale. The existing provision is mainly concentrated round the Riverside and Rotunda character areas. The eating and drinking provision at the Riverside comprises restaurants, bars and cafes, including Browns, Byron Burger and Carluccios, which provide a pleasant waterfront leisure environment. The area around the Rotunda generally caters for the younger market, providing a lower quality leisure offer and comprises Oceana nightclub, pubs, restaurants, amusements and an Odeon cinema.
- 6.19 There are also a number of food and drink retailers within the rest of the centre. These are dispersed throughout the retail offer in the shopping centres and main shopping streets and include cafes, restaurants and takeaways. Retailers include; Millie's Cookies, Starbucks, McDonalds, Paul Bakers, Prêt a Manger, Café Nero and many independent retailers.

Accessibility

- 6.20 Kingston is highly accessible by private vehicle via the M25 Orbital, M3, M4 and A3 and the town centre is served by a number of car parks. The PTAL rating of Kingston town centre is 6a (excellent). The centre is served by national rail and bus services and falls within Zone 6 on the London Underground map. Approximately 40 bus routes serve Kingston town centre, connecting the centre to Greater London, Surrey and Heathrow Airport. The nearest underground stations are located at Richmond and Wimbledon. Kingston is identified as a potential stop on the proposed Crossrail 2 route connecting south west and north east London.

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- 6.21 The Councils Town Centre Car Parking Strategy (2004) estimates that there are approximately 7,000 publicly available car parking spaces within the town centre, and an additional 1,400 retailer owned spaces.
- 6.22 Results from the household telephone survey (2013) confirm that the majority of visitors travel to Kingston by private car or van (61%) and a further 29% travel by bus, whilst c.1% of all respondents cycle into Kingston town centre. Circa 42% of residents from within the local borough catchment travel by private car/van, 31% by bus, 20% travel by foot and circa 3% cycle into Kingston town centre.
- 6.23 In order to assess the pedestrian activity within Kingston town centre, we have used data from PMRS pedestrian flow figures (October 2010). Clarence Street achieves the highest pedestrian flows within the centre. Other busy locations include the Historic Core, especially the Market Place; the entrance to The Bentall Centre on Clarence Road; and the eastern entrance to Eden Walk. Our site visit found that although the areas around the key shopping anchors were busy, this did not translate into high pedestrian flows between other destinations in the town, indicating poor connectivity through the centre.
- 6.24 Overall, Kingston is well connected with the wider London region and therefore accessibility to the centre is strong. There is, however, concern over vehicular congestion within the centre, particularly along Horse Fair and Wood Street.

Vacancies

- 6.25 There are currently 29 vacant units within Kingston town centre, which equates to a vacancy rate of c. 5%. This falls significantly below the national and regional averages and indicates that Kingston town centre is performing well, and there is strong retail demand for units.
- 6.26 There are three small clusters of vacant units; the area east of Eden Street, along Richmond Road and along the Riverside. Throughout the remainder of the town centre there are few small dispersed vacant units. The majority of the vacant units within Kingston town centre are small and less well suited to modern retailer requirements, indicating that these units may be deficient in meeting the demand arising.

Retailer Demand

- 6.27 According to Co-Star Focus Database, in July 2013 there are 63 retailer requirements within Kingston town centre. There are a high number of comparison and leisure service requirements, from both mid and aspirational retail brands. Retailers seeking to locate within the centre include a mix of mid and high end retailers such as Powerleague, Curzon Cinemas Ltd, Little Waitrose, Iceland, Neal's Yard Remedies, Bjorn Borg, Virgin Holidays, Yorkshire Building Society

and Traid. Food and drinks retailers seeking to locate within Kingston include The Bell and Brisket Ltd; Café Rouge, Bella Italia, Strada and Chiquito.

Table 6.3: Published Retailer Requirements for Kingston

	No. of Units	Min. Floorspace (sqm)	Max. Floorspace (sqm)
Convenience	6	1,417	2,257
Comparison	38	6,080	12,764
Retail Services	3	465	650
Leisure Services	14	6,030	15,982
Financial Services	2	465	929
Total	63	14,455	32,582

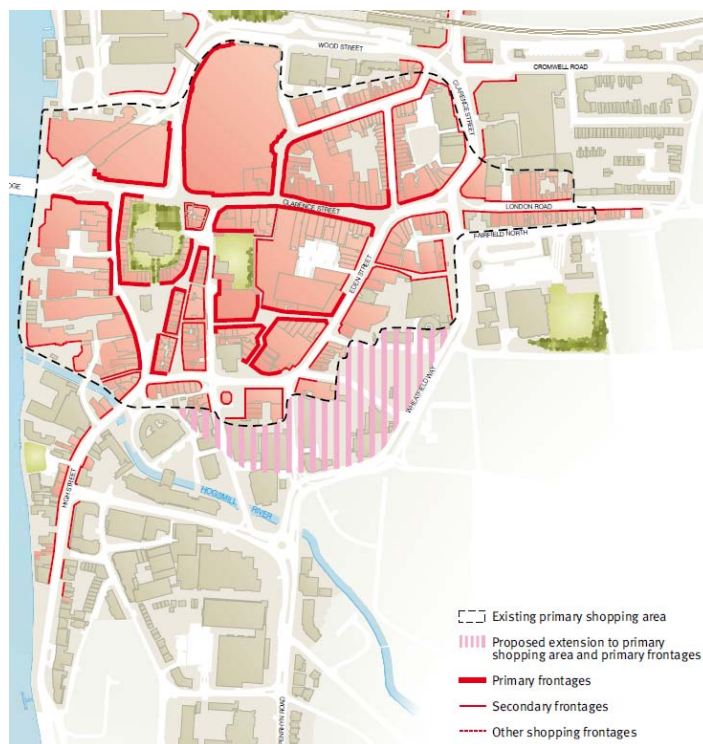
Source: Co-Star Focus Database (July 2013)

- 6.28 The Co-Star Focus retailer requirements database, although a useful indicator, does not identify and publish all retailer demand in a centre. Analysis of retail and leisure demand in Kingston undertaken by CBRE for British Land (March 2013) highlights the strength of retailer demand in Kingston. Through discussions with key stakeholders, we are aware that several existing retailers within the centre are seeking to upgrade to larger and more modern units. The CBRE research identifies that key brands looking to locate in Kingston town centre are unable to find available stores of an optimal size to locate in.
- 6.29 There are several key mass market retailers currently 'missing' in Kingston town centre such as Debenhams, Adidas, Bershka, Simply Be, and Internazionale. Taking into consideration the relative affluence of the catchment area, there are also significant gaps in the high end retail offer of Kingston, particularly compared with current tenants at Westfield London. There may be potential demand from more aspirational retailers including All Saints, Urban Outfitters, Banana Republic, Harvey Nichols, Mamas and Papas, Armani Exchange and Anthropologie.

Retail Frontage

- 6.30 The Kingston Core Strategy designates primary shopping area (PSA) which is broadly enclosed within the main road network and the River Thames (illustrated in Plan 6.1 below).

Plan 6.1: Kingston Town Centre Retail Frontage



Source: Kingston Town Centre Area Action Plan (2008)

- 6.31 The primary shopping frontage covers the core shopping area within Kingston town centre, including The Bentall Centre, the High Street, the Market Place and part of Eden Walk and John Lewis. Policy K2 of the Kingston Town Centre AAP (2008) states that proposals for change of use, including through redevelopment, from retail (Class A1) to other uses at ground floor level will not be permitted along primary shopping frontages.
- 6.32 The secondary shopping frontage covers the wider shopping area within Kingston town centre, including the riverside leisure development, the rotunda character area, London Road, and roads closely surrounding the primary shopping frontages. Policy K2 of the Kingston Town Centre AAP (2008) states that proposals for a change of use, including through redevelopment, from retail (Class A1) to financial and professional services (Class A2) or restaurants and cafes (Class A3) at ground floor level will be permitted along secondary shopping frontages, provided that the proposal would not result in a concentration of non-retail uses.
- 6.33 'Other shopping frontage' is designated along Richmond Road, north of Kingston train station. Policy K2 of the Kingston Town Centre AAP (2008) states that proposals within this designation for the change of use, including through redevelopment, of existing shops (Class A1) to other uses appropriate to a shopping frontage, such as drinking establishments (Class A4), hot food

take-away (Class A5), community service offices and meeting places, surgeries and consulting rooms, entertainment and recreation uses, police use and facilities for public administration, will be considered on their merits.

Character Areas

- 6.34 For the purposes of this Retail Study we have divided Kingston town centre into ten character areas according to their physical built form and retail/service offer (illustrated below).

Plan 6.2: Kingston Town Centre Character Area Plan



Source: Goad Plan, March 2013

A – Clarence Street

- 6.35 The character area is centred along the pedestrianised area of Clarence Street which forms the centre point of Kingston's primary shopping area (PSA) and comprises both retail and

service floorspace, including Marks and Spencer located within Eden Walk Shopping Centre. At present Marks and Spencer have a compromised offer in Kingston town centre, with their full product range split between two stores on Clarence Street (units 26-32 and 69-73). All the units within this area are currently designated as primary shopping frontages. The main entrance to The Bentall Centre and an alternative entrance to Eden Walk Shopping Centre are situated within this character area.

- 6.36 Clarence Street primarily serves a shopping function, with key comparison retailers such as Top Shop, Marks and Spencer, Monsoon, Gap, Superdrug and French Connection located in the character area. The pedestrianised street scene, as well as many modern shop frontages at Office Shoes, French Connection and North Face, provides an attractive shopping environment. According to Goad Category Report (July 2012), there are two vacant units within the character area, comprising a total of 254 sqm net floorspace.

B – The Bentall Centre

- 6.37 The Bentall Centre is the anchor retail development within Kingston town centre comprising 110 units. The main entrance is located on Clarence Street, with additional entrances on Wood Street and Fife Road. The whole centre is located within the PSA.
- 6.38 Bentalls/Fenwick department store acts as an anchor retailer within the centre. Other key anchor retailers include: Zara, H&M, Dune, Hollister and Waterstones. Although dominated by comparison goods retailers, the centre also comprises a number of leisure service operators including Costa, Zest, Café Giardino, Starbucks, and McDonalds.
- 6.39 The shopping centre opened in 1990 and provides the main retail offer in the town centre. The covered shopping centre with iconic glazed atrium provides an attractive shopping environment, although we note that it would benefit from cosmetic improvements to modernise the facilities. The facades of the shopping centre are in the process of being rejuvenated as part of the development of a new YO! Sushi unit. There are currently three vacant units within the centre comprising a total of 306 sqm net floorspace.
- 6.40 Throughout the recession The Bentall Centre has continued to invest in repositioning the retail offer of the centre by providing a new tenant mix (e.g. Zara Home) as well as relocation and amalgamation of units to provide larger floorplates (e.g. Apple have recently upsized).

C – John Lewis/Waitrose

- 6.41 The John Lewis/Waitrose character area is located in the north west of the town centre, adjacent to Clarence Street and The Bentall Centre. The character area comprises John Lewis, Waitrose and four smaller units (Origins Health and Beauty, Clarins Skin Spa, Essence Nightclub and a vacant unit).

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- 6.42 The John Lewis/Waitrose department store extends over 5 floors with an underground car park below. The John Lewis Store is constrained, resulting in a compromised store which is divided into two units at ground level with Horse Fair running through the middle. The entire character area is located within the PSA; the eastern block is designated primary shopping frontage while the western is designated secondary shopping frontage.
- 6.43 The area surrounding John Lewis has wide pavements and a pedestrian crossing connecting John Lewis to the Bentall Centre and Riverside character areas. The road network running through the unit at ground level is the main route into the centre from the west. The PMRS Pedestrian Flow Figures (October 2010), demonstrates that footfall outside John Lewis is low in comparison to footfall levels on Clarence Street. This reflects that John Lewis forms the edge of the main retail area in Kingston, but it could also indicate that there is a lack of linked trips between the John Lewis Store and the rest of the centre.

D – Historic Core

- 6.44 The Historic Core character area is located within the PSA between Eden Quarter and the Riverside and includes a range of shops, All Saints Church and the ancient market place. The majority of the area is designated as primary shopping frontage, whilst the south east of the character area, covering Union Street, Crown Passage, Apple Market and Eden Street are designated as secondary shopping frontages.
- 6.45 The shopping environment within the Historic Core targets a higher end offer than the rest of the centre, with units including; Reiss, Cath Kidston, Jack Wills, Molton Brown and Whistles. There are also a number of independent boutique style shops and cafes. The majority of units within the area are small in size and restricted by the Old Town Conservation Area (OTCA) which covers the whole character area and west to the River Thames. The Kingston Town Centre AAP (Policy K11) seeks to 'retain and restore traditional features such as shop fronts, walls, paving' within the OTCA.
- 6.46 A regular market operates within the Market Place from Monday to Saturday and hosts a range of stalls including small food tents, greengrocer, fishmonger, butcher and more. This market has a number of high quality specialist retailers, many of which also operate in Borough Market.
- 6.47 There are multiple adjoining interlinking passages reflecting the historic layout of the centre, including Shrubsole Passage, Kings Passage, Griffen Centre and Crown Arcade. Crown Arcade provides pedestrian access between the Historic Core and Eden Walk and Kings Passage links the Historic Core to the Riverside.

E – Eden Quarter

- 6.48 The Eden Quarter comprises Eden Walk Shopping Centre and its immediate surroundings. The character area forms the south east quarter of the designated primary shopping frontage.
- 6.49 The shopping centre has circa 29 units and a multi storey Q-Park car park above. The centre is dominated by comparison goods retailers, with few leisure service operators. The convenience goods offer is made up of Sainsbury's Central and Marks and Spencer Foodhall (which is situated within the southern Marks and Spencer store at 26-32 Clarence Street, the main clothing store is located at 69-73 Clarence Street which is not within Eden Walk). Other retailers within the centre include Boots, BHS, Claire's Accessories and Clinton Cards. The retail offer in Eden Walk is of a generally mid-market offer.
- 6.50 Analysis undertaken by CACI on behalf of British Land (Eden Walk Survey Analysis v1.0, October 2010) has identified the shopper profile of visitors to Eden Walk. The predominant age category for visiting the centre is 18-24 year olds (37% of shoppers), which reflects the high levels of students in the centre. The majority of shoppers in Eden Walk (52%) fall within the 'urban prosperity' ACORN category, which represents well educated people, including students, graduates and young professionals.
- 6.51 The centre has undergone small scale cosmetic improvements to the exterior including new signage and shop frontage upgrades. The interior facades within the centre remain dated. Pratt Passage, which links Eden Walk to Clarence Street, would also benefit from upgrade works, such as improved safety measures.

F – Fife Road/Castle Street

- 6.52 Located to the north east of Kingston town centre, Fife Road, Castle Street and the units to the west of Clarence Street are all within the PSA. Wood Street and Clarence Street are designated within the Kingston Town Centre AAP as part of the Town Centre Road Network.
- 6.53 The majority of shop frontages situated between the train station and Clarence Street are designated secondary shopping frontages. Units vary in size and nature; key retailers include PC World, Sports Direct, Greggs Bakers, Coral Betting and Subway. According to Experian (July 2012), there are four vacant units.

G – Riverside

- 6.54 The Riverside character area forms a stretch of the River Thames comprising a number of restaurants, bars and shops as well as a number of residential units. This character area primarily provides leisure services, during both the daytime and evening. Leisure retailers within the area include Byron Burger, The Gazeo Bar, Carluccios, Browns and The Slug & Lettuce.

6.55 The majority of the Riverside character area is located within the PSA and these shop frontages are designated as secondary shopping frontages. The area south of Clarence Street is not included within the PSA, but comprises restaurants and bars and is therefore in keeping with the character area.

6.56 Signage to the Riverside area is poor and access is generally through narrow walkways including Shrubsole Passage, Kings Passage and Griffen Centre. There are public realm enhancements, such as seating, which provides an attractive environment along the River.

H – Old London Road

6.57 Old London Road is located to the east of Kingston town centre. The area is situated on the boundary of the PSA and designated as secondary shopping frontage.

6.58 The street is made up of a bespoke range of small independent units including; Old London Road Tattoos, Kingston Antiques Centre, Polish Café and Mosaic King Art and Craft. With the exception of Travelodge and Dreams, the units along Old London Road are small in size. According to Experian (July 2012), there are two vacant units within the Old London Road character area.

6.59 Public realm improvements, including pedestrianised access and street art enhance the aesthetic appearance and attraction of the area. The road acts as a pedestrian route into Kingston from the east of the town centre.

I – Rotunda

6.60 The Rotunda is located to the north east of Kingston town centre, between Kingston Station and Old London Road. The character area forms another leisure quarter within the centre and comprises a 14 screen and IMAX Odeon cinema, bowling alley, bars and restaurants. Within the wider character area, there is also an Oceana nightclub. The Rotunda is not currently incorporated within the PSA; however, the frontages are designated as secondary shopping frontages.

J – East of Eden Street

6.61 The area to the south east of the Kingston town centre is partially located within the PSA. Shop frontages located along Eden Street are designated as secondary shopping frontages.

6.62 The character area is currently largely made up of mid market retailers, including Argos, Primark, Multiyork, Costcutter, Lidl, MacDonald's and various independent takeaways. There are also few primary service units including Halifax and Specsavers. The Hippodrome, a large nightclub, is located to the south of the character area and the rear of the character area comprises a number of large car parking facilities.

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- 6.63 At the time of visit a number of units within this area were vacant and boarded up, including the units on the junction of Ashdown Road and Wheatfield Way. The Kingston Town Centre AAP designates the area as an extension to the PSA (Policy P3).

Investment

- 6.64 Since the development of The Bentall Centre and Eden Walk, there has been very little investment into significantly enhancing and updating the retail offer within Kingston town centre which has resulted in a lack of available retail units which adequately meet modern retailer requirements.
- 6.65 Small scale aesthetic improvements have been made at Eden Walk shopping centre; however we understand there are aspirations to significantly improve the shopping offer and environment of Eden Walk. In addition small scale improvements to The Bentall Centre, for example works to the façade and the installation of a new restaurant, are in the process of being implemented. We understand that The Bentall Centre has on-going aspirations to continue to maximise the aspirational tenant mix of the shopping centre to increase the quality of the retail offer.
- 6.66 Recent investment in office developments in Kingston shows signs of the local office market picking up following a period of prolonged downturn. Saipem Limited have recently relocated their headquarters into the newly developed Kings Place located near Kingston train station. The 90,000 sq ft office scheme secured the largest office letting outside of Central London at the time. However, the office market in Kingston remains uncertain and there is some redundant office building stock which may be suitable for alternative uses.

Development Sites

- 6.67 The Kingston Town Centre AAP (2008) sets out 20 development site opportunities within Kingston. In preparing this study, GVA have identified two more sites which may have potential for future investment/development within Kingston town centre. A schedule of these sites, their potential and current development status is set out in Appendix 1. Of the Kingston Town Centre AAP sites, sites P4, P11, P12, P17 and P18 are all in the process of being developed or are completed, and are therefore not available to accommodate retail needs.
- 6.68 The analysis in Appendix 1 identifies that there are three main town centre development sites allocated for retail development: P1 (Clarence Street North); P2 (Eden Quarter - South of Clarence Street); and P3 (Eden Quarter - East of Eden Street and Ashdown Road). Sites P1 and P2 are located within the PSA and the P3 site is allocated in the Core Strategy as an extension to the PSA. These sites are yet to be developed to provide additional retail floorspace, however

our site visit confirms that these areas would benefit from significant investment and improvement works. Redevelopment will support the logical integration of P3 within the PSA.

6.69 The NPPF requires LPAs to apply a sequential test for town centre uses, directing such development to town centre locations in the first instance. Accordingly, subject to the level of identified retail needs arising in Kingston Town Centre (see Section 9), the P1, P2 and P3 sites are considered to be sequentially suitable sites to accommodate future retail development. Therefore the Kingston Town Centre AAP sites P1, P2 and P3 are considered to still be appropriate allocations, subject to capacity arising.

6.70 In addition to the three main retail development sites, there remains potential for smaller scale retail development on Kingston Town Centre AAP sites P8, P9, P10, P13, P20.

Customer Views and Behaviour

6.71 Results from the household telephone survey (March 2013) indicate that the majority of respondents (45%) visit Kingston every one to three months. The majority of visitors to Kingston travel by private car/van (61%), a smaller proportion of visitors travel by bus (29%). This is consistent with the high demand for parking facilities and dependency on the road network within the local area.

6.72 The results of the household telephone survey show that the majority of local residents, travelling from within Kingston borough visit Kingston town centre at least once a week (43%), indicating the strength of the local catchment. Circa 42% of local residents travel by private car/van, 31% by bus and 20% travel by foot into Kingston town centre. This reinforces the pressure on the parking facilities and road network.

6.73 Of those respondents who visit Kingston most often to undertake fashion shopping, approximately 43% also undertake a linked trip; combining their visit with other shopping and leisure activities. The most popular linked trips include visits to cafes and restaurants (32%). However this is below the proportion undertaking shopping and eating linked trips in Westfield London (52%), Guildford (40%) and the West End (34%). Other linked trips undertaken in Kingston include visiting the cinema (5%), using other comparison goods shops and financial services (both 4%), and food shopping (3%).

6.74 Visitors favour Kingston over neighbouring centres due to its reputation, range of independent shops and attractive environment. Main dislikes are the parking facilities and congestion (in terms of both pedestrian and vehicles). Respondents stated that improvements to the parking facilities and vehicle congestion would make them visit the centre more often.

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- 6.75 Of those respondents who visit Kingston town centre, when asked what they liked about town centre the principal response was retail. A much smaller proportion of respondents mentioned leisure activities, with circa 3% identifying the Riverside and the restaurants in the town centre 1% identifying the theatres and coffee shops/cafes., and less than 1% of respondents mentioning evening leisure facilities (pubs/bars, cinema and nightclubs) as 'likes'. Notwithstanding the attractiveness and evident success of existing leisure facilities, this indicates there is significant scope for improvement in perceptions of Kingston leisure and food and drink offer.
- 6.76 Of those respondents who live in the Kingston zone (1a), approximately 75% visit Kingston for daytime eating, but a lower proportion visit Kingston for evening eating (70%). Key competing leisure destinations for eating include the West End, Richmond, Wimbledon and Surbiton. 50% of respondents who live in the Kingston zone visit Kingston town centre most often for drinking in the evening; but competing centres include the West End (11%), Richmond (10%) and smaller centres such as Esher (5%) and Wimbledon (3%). A number of respondents stated that they would visit Kingston more in the evening if the retail and leisure offer is extended (i.e. later openings and a better/wider restaurant, pub, café, outdoor dining, theatre, concert, cinema and nightclub offering).
- 6.77 When asked which leisure facilities are lacking within a reasonable distance of your home, respondents living in the Kingston zone identify a lack of swimming pools, sports halls, gyms/health and fitness clubs and ice rinks in the local area.

Kingston Town Centre Swot Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Established as the leading Metropolitan centre; • Strong sales and market share; • Strong comparison goods market offer; • Riverside location; • Affluent high spending catchment with strong affinity with current offer • Largely traffic free environment; • Character areas present high quality environments (including the Historic Core and Riverside), with historic architecture and statutorily Listed buildings; and • The Bentall Centre and John Lewis are key anchors 	<ul style="list-style-type: none"> • Shortage of modern retail floorspace; • Aspirational / luxury offer is not well aligned to the catchment; • Poor connectivity and permeability between distinctive character areas; • Perception of congestion / parking issues; • Limited centrally located quality eating / drinking offer; • Evening economy dominated by bars / clubs and lacks appeal to the wider catchment; • Disparate ownership and ability to deliver co-ordinated comprehensive development; and • Lack of coordinated town centre management in comparison to purpose built shopping centres.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Active BID and key stakeholders; • Historic character assets currently underused i.e. Market Place, Riverside and historic buildings; • An affluent and resilient catchment; • Major landowner commitment to delivering growth and expansion of the retail area; and • Opportunity to develop an up to date strategy and policy base. 	<ul style="list-style-type: none"> • Growth of the internet; • Increased competition from London West End, Croydon, Westfield and Guildford; • Potential pressure for out of town retail; • Competitive advantage of centres with active and co-ordinated town centre management and marketing; and • Risk of complacency and inertia about performance of Kingston town centre.

7. District Centre Audits & Out of Centre Retail Provision

7.1 An in depth town centre audit of the District Centres within the Royal Borough of Kingston was conducted in March 2013. This section presents the detail of previous performance according to past retail studies in comparison to the current position of each District Centre. Following this, it summarises the out of centre retail provision within and surrounding the Borough. Plan 5 and 6 illustrate the Kingston retail hierarchy and the location of key foodstore attractors. An assessment of the designated retail frontages are then analysed in Section 9.

Surbiton District Centre

Conclusions of Previous Retail Studies

7.2 Before we undertake the updated health check for Surbiton, we briefly review the conclusions of the previous performance of the centre as recorded by the 2003 Retail Study and 2010 Retail Study Update, both undertaken by RTP.

Retail Study (January 2003)

7.3 The 2003 Retail Study did not include a traditional health check of existing centres, however some conclusions of the study are relevant to the consideration of the overall vitality of the centre. In comparison to other London district centres, the study found that Surbiton had a significantly lower proportion of A1 floorspace. The study also assessed the results of retailer/business survey responses on the performance of the District Centres. For Surbiton, the 2003 Retail Study found that:

- Trading conditions were not perceived as positive as in Kingston or New Malden by local businesses;
- The quality of public transport links, the ease of access to the centre and the range of shops (specifically convenience provision) were identified as key strengths;
- Key weaknesses identified were the range of shops (specifically, the comparison goods offer), the lack of sufficient car parking, the pricing of parking and the quality of shops;
- Key changes that could improve Surbiton were the provision of more car parking, improved street cleanliness and provision of a better range of shops; and
- Despite quality of public transport links, transport by car is still the most common mode of transport used to get to work.

Retail Study (June 2010)

7.4 The 2010 Retail Study Update by RTP focused specifically on convenience provision in the centres and therefore did not include an updated health check on comparison or other supportive main town centre uses in the centre. It found that:

- The convenience sector accounted for 23.7% of retail floorspace in Surbiton, which was higher than the national average of 16.7%;
- The Waitrose and Sainsbury's are well used, with the M&S Simply food performing a primarily top up role. The centre also had thirteen other small independent retailers such as off-licenses, a bakers and confectioners, tobacconists and newsagents. There were no butchers or greengrocers/fishmongers in the centre and no specific ethnic retailers;
- The centre had below average representation of comparison goods floorspace, representing 32.1% of total floorspace compared to the national average of 51.1%;
- Food and drink uses (A3 and A5) accounted for 15.3% of total town centre floorspace, higher than the national average. The centre also had above average proportions of floorspace used for retail services (10.7% compared to 4.9%) and financial services (12.7% compared to 7.7%).
- Vacancies in the centre total 5.5% of total floorspace, against a national average of 9.3%.

Surbiton District Centre Audit 2013*Existing Provision and Composition*

7.5 Altogether we consider that Surbiton is a healthy and active centre which continues to serve an important district-level role in local retail provision. Table 7.1 and 7.2 below summarises the composition of uses in the centre as of 2013 in terms of units and floorspace.

Table 7.1: Surbiton District Centre Composition of Uses (Units), 2013

	No. of units	% of Total	UK Average (%)	Variance
Convenience	13	7.43	8.57	-1.14
Comparison	66	37.71	40.90	-3.19
Service	89	50.85	35.67	+15.18
Vacant	7	4.00	13.72	-9.72
Misc.	0	0.00	1.13	-1.13
Total	175	100.00	100.00	

Source: GVA Audit (March 2013), UK Average from Experian Goad Summary Report.

Table 7.2: Surbiton District Centre Composition of Uses (Floorspace), 2013

	Floorspace (sqm)	% of Total	UK Average (%)	Variance
Convenience	7,665	24.74	17.26	+7.48
Comparison	10,712	34.57	45.79	-11.22
Service	11,937	38.53	23.71	+14.82
Vacant	669	2.16	12.22	-10.06
Misc.	0	0.00	1.03	-1.03
Total	30,983	100	100	-

Source: GVA Audit (March 2013), UK Average from Experian Goad Summary Report.

- 7.6 The results of the audit show that the centre has a below average number of convenience outlets, however Waitrose and Sainsbury's both have relatively large stores and, overall, there is a strong representation of convenience goods retailers in the centre. In addition there is a Marks and Spencer Simply Food and local convenience stores which add to the overall food offer in the town centre.
- 7.7 Comparison floorspace has risen slightly since the previous retail studies, suggesting the centre continues to fulfil an important shopping role for nearby residents despite the economic recession. The number of comparison goods outlets in the centre is just below the national average, with provision comprising a mix of independent and national multiples. The stores are relatively small, with comparison floorspace representing 34.57% of total floorspace in the Surbiton, below the national average 45.79%. However, this is considered reasonable bearing in mind the proximity of Kingston-upon-Thames. We consider that a fashion-based variety store would significantly strengthen the comparison goods offer however this would be dependent upon market demand and the existence of a suitable site available with excellent links to the town centre.
- 7.8 There is a growing café/restaurant culture in Surbiton, which is focused on the St. Mark's Hill roundabout and Victoria Road. These types of uses will help foster an 'evening' economy and should be supported to help ensure that the centre is vital and active throughout the day and evening.

Accessibility

- 7.9 The centre benefits from a relatively affluent catchment area and, due to its excellent public transport links, it is popular with London commuters. We consider that there is particular merit in promoting public realm improvements to the junction of Brighton Road and Victoria Road to full

integrate the railway station with the wider District Centre and better highlight this gateway entrance to Surbiton District Centre.

Vacancies

- 7.10 Vacancies remain well below the national average and there do not appear to be any particular clusters of inactivity or vacancies. Vacancies appear to be dotted sporadically throughout the centre; however the few that do exist tend to be along Brighton Road or at the south-western end of Victoria Road. The completion of commercial uses at Surbiton Plaza will play an important role in maintaining the momentum of footfall along this part of the centre and may increase the attractiveness of other vacant units in this area of the centre.

Retailer Demand

- 7.11 The latest Co-Star 'Town Focus' report for Surbiton has been generated to understand existing demand for retailer representation in the centre. As of March 2013, there were three outstanding requirements. These are as follows:

- 75 – 160 sqm for **Holland & Barret**, since June 2012;
- 93 – 230 sqm for **Card Factory**, since February 2013; and
- 93 – 140 sqm for **Rush Hair**, since February 2013.

- 7.12 Based on the results of the town centre audit, there appears to be units available which fulfil the floorspace criteria of outstanding requirements, however it may be that they do not fulfil other more specific location requirements or rental values. The relationship between vacancies and retailer requirements should be monitored to understand any potential gaps between supply and demand.

Investment and Development Sites

- 7.13 Surbiton has benefited from an ongoing Town Centre Improvement Strategy, which has helped to reduce traffic issues and improve wider public realm in the centre. We anticipate that current and planned private and public investment will continue to enhance the centre, improving the public realm and acting as a catalyst for further investment in the centre. The completion of commercial uses at Surbiton Plaza will play an important role in maintaining the momentum of footfall along this part of the centre.
- 7.14 With respect to private investment, we are also aware of a proposal for the development of ground floor retail/commercial space, a doctor's surgery and several stories of residential flats is currently taking place adjacent to and behind the former Post Office Site off Victoria Road. Upon completion, the development will provide additional commercial floorspace.

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- 7.15 There are no obvious additional development sites in the centre, and as such, any future retail need arising from population growth will need to be met elsewhere in the District.

Customer Views and Behaviour

- 7.16 There is a reasonably high satisfaction level of those who currently use the centre. However, of those that expressed a 'dislike', one of the more frequent comments was that it was difficult to park. Off-street public car parking appears to be well used, however the whole area lies within a controlled parking zone and there are limited opportunities for on-street car parking. It may be worth considering ways of managing parking to increase accessibility to the centre.

Retail Frontage

- 7.17 The extent of the Surbiton shopping frontage is defined in the Core Strategy, extending along part of Brighton Road, along Victoria Road, and including parts of St James' Road, Claremont Road and St Marks Hill.
- 7.18 The Council's latest Annual Monitoring Report (2012) shows that there has been a drop in the proportion of (Class A1) retail uses across all district centres, including Surbiton, since 2004. In Surbiton, the percentage of A1 uses dropped from near 70% in 2004 to circa 53% in 2007 and has fluctuated around the 55% mark ever since. Out of the three district centres, Surbiton now has the lowest proportion of A1 street frontage in the shopping frontage (54%, compared to 60% in New Malden and 62% in Tolworth). This policy requirement has been superseded by Adopted Core Strategy Policy DM19, which states that retail frontages in the District Centres will be "predominantly for retail use" and any applications for change of use that would threaten this predominance would be resisted.

Surbiton District Centre Swot Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Railway station and public transport linkages; • Mix of uses, particularly good provision of 'anchor' convenience stores and services; • Low vacancy rate and no areas of inactivity; and • Retailer confidence in centre, with new outlets opening (e.g. Pizza Express, Zizzi). 	<ul style="list-style-type: none"> • No obvious development sites; • Relatively limited comparison goods offer, with perceived lack of multiple retailers; and • Dominance of multiple foodstore operators and lack in range of independent retailers.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Affluent walk-in catchment area; • Growing popularity as a London commuter town; • Potential to develop an 'evening' economy of café/restaurant/bar uses; and • Town Centre Improvement Strategy will continue to enhance public realm. 	<ul style="list-style-type: none"> • Limited geographic catchment area compared to Kingston and other higher order centres; • Perception that parking is difficult in the centre; • Ongoing pattern of polarisation towards larger centres; and • Strength of out of centre and online retailing.

Tolworth District Centre

Conclusions of Previous Retail Studies

7.19 Before we undertake an updated health check, we briefly review the conclusions of the previous performance of the centre as recorded by the 2003 Retail Study and 2009 Retail Study Update, both undertaken by RTP.

Retail Study (January 2003)

7.20 As described above, the 2003 Retail Study did not include a traditional health check of existing centres, however some conclusions of the study are relevant to the consideration of the overall vitality of the centre. In comparison to other London district centres, the study found that Tolworth had an 'above average' proportion of A1 floorspace. Nevertheless, it concluded that Tolworth was one of the weakest performing of the district centre. The study assessed the results

of retailer/business survey responses on the performance of the District Centres. For Tolworth, the 2003 Retail Study found that:

- Although no traders reported a decrease in trade over the previous 12 month period, conditions were not as positive as recorded in New Malden and Kingston;
- Key strengths were identified as the public transport links and freely available car parking;
- Majority of traders considered that the performance of the centre had deteriorated or, at best experienced no change, over the previous five years; and
- Despite quality of public transport links, the car is still the most common mode of transport used to get to the town centre.

Retail Study (June 2010)

7.21 The 2010 Retail Study Update by RTP focused specifically on convenience provision in the centres. It found that:

- The convenience sector accounted for 21.9% of retail floorspace in Tolworth, which was higher than the national average of 16.7%;
- With respect to convenience provision, four of the 18 convenience outlets in the centre were operated by national retailers (M&S Simply Food, Budgens, Iceland and Tesco Express). The remainder are small independent retailers such as bakers and confectioners, tobacconists and newsagents;
- There were six ethnic convenience retailers, including three Asian supermarkets;
- Comparison goods provision in the centre was below the national average, representing 41.3% of total floorspace compared to the average of 51.1%.
- The centre had above average provision of floorspace used for retail services (7.1% compared to 4.9%), financial services (8.2% compared to 7.7%), and restaurants and cafes (13.9% compared to 9.2%); and
- Vacancies in the centre were below the national average, representing 7.3% of all units compared to the national average of 9.3%.

Tolworth District Centre Audit 2013

Existing Provision and Composition

7.22 Tolworth is the smallest district centre in the Borough, little more than half the size of Surbiton or New Malden (based on total floorspace) and has a wide mix of services and facilities. The Broadway forms the retail and commercial core of the centre, a dual lane carriageway which branches off the A3 and has high levels of traffic. Also, unlike Surbiton and New Malden, the

railway station in Tolworth is separated from the retail core by the A3, which further reduces accessibility.

7.23 Table 7.3 below shows the results of the latest town centre audit.

Table 7.3: Tolworth District Centre Composition of Uses (Units), 2013

	No. of units	% of Total	UK Average (%)	Variance
Convenience	14	10.85	8.57	+2.28
Comparison	47	36.43	40.90	-4.47
Service	57	44.19	35.67	+8.52
Vacant	9	6.98	13.72	-6.74
Misc.	2	1.55	1.13	+0.42
Total	129	100.00	100.00	

Source: GVA Audit (March 2013), UK Average from Experian Goad Summary Report.

Table 7.4: Tolworth District Centre Composition of Uses (Floorspace), 2013

	Floorspace (sqm)	% of Total	UK Average (%)	Variance
Convenience	3,354	18.38	17.26	1.12
Comparison	7,191	39.41	45.79	-6.38
Service	5,853	32.09	23.71	8.38
Vacant	1,542	8.45	12.22	3.77
Misc.	307	1.68	1.03	0.65
Total	18,246	100	100	-

Source: GVA Audit (March 2013), UK Average from Experian Goad Summary Report.

7.24 The centre has an above average number of convenience outlets, most of which are independents. Although these play an important role in providing for the local needs of residents, we consider that facilities for main food shopping are relatively limited. As a result, a high proportion of trade from the area is leaking out-of-centre to stores like the Tesco Extra at New Malden. We therefore consider that there is a qualitative argument in favour of a new main foodstore in Tolworth to clawback expenditure and encourage linked trips to other shops and services in the centre.

7.25 The centre has a below average number of comparison goods units, and has the lowest level of multiple comparison retailers of the three District Centres. Provision is spread along The Broadway with no one store or facility serving as an 'anchor' to non-food offer. Units are relatively dated and may struggle to meet the requirements of national multiples. We consider that there could be a qualitative argument to support an anchor comparison goods retailer in Tolworth, however this would be dependent market demand and the existence of a suitable site.

7.26 Services uses account for 45% of all units in the centre, and almost half of these are leisure uses of which several are takeaways. With respect to cafes/restaurants, the centre lacks national chains, however we consider that this is partially made up for by the range of local independents.

Accessibility

7.27 The PTAL rating throughout Tolworth town centre is 3 (Moderate). Tolworth train station is located south of the centre, opposite the A3 Kingston Bypass and the station provides rail services to London Waterloo via Raynes Park, Wimbledon, Clapham Junction and Vauxhall. Services take approximately 30 minutes. Tolworth is located within zone 5. Six bus routes serve Tolworth, connecting to Kingston, Surbiton, New Malden, Putney, Epsom, Twickenham and more. The nearest underground stations are Wimbledon (8km east) and Richmond (11km north).

7.28 Tolworth is highly accessible by car, lying directly northwest of the A3 which provides access to the M25 Orbital motorway to the south and central London to the north. The majority of car parking spaces in the centre are provided in the Tolworth Tower multi-storey. The household telephone survey (2013) indicates that parking in the centre may be constrained, with the majority of spaces delivered through the Tolworth multi-storey. The need to provide suitable car parking facilities to support the centre should be born in mind when planning for the centre.

7.29 Pedestrian footfall counts are not readily available for Tolworth District Centre. However, it is clear that footfall and accessibility is currently impeded by pedestrian guard rails; however this is should improve significantly after completion of the public realm improvements.

Vacancies

7.30 Vacant floorspace has increased slightly from 1,260 sqm in 2010 to 1,542 in 2013. However the number of vacant outlets has decreased from 11 in 2010 to only 9 in 2013, representing 6.98% of total outlets which is below the national average of 13.72%. Vacancies now represent 8.45% of total floorspace, which is below the national average of 12.22%.

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- 7.31 Following the audit of the centre, it is clear that there is a cluster of vacancies on Ewell Road, to the east of The Broadway. The units here are small, dated and do not benefit from visibility from the main shopping frontage. There also appears to be a cluster of vacancies at the southern end of the Broadway, at the corner of the junction of the A3 (including the newly closed former Blockbuster unit).

Retailer Demand

- 7.32 As of March 2013, the Co-Star Focus Report for Tolworth shows that there are two outstanding retailer requirements for representation in the area. This level of interest in Tolworth is considered positive bearing in mind the continued retrenchment of most retailers to the relative 'safety' of higher order centres.
- 7.33 Retailer demand includes 93-230 sqm for **Card Factory** (published requirement February 2013) and 93-185 sqm for **Costa Coffee** (published requirement March 2013). It should be noted that both of these operators also have requirements in a number of centres within close proximity, and therefore these requirements are not restricted to Tolworth.
- 7.34 We also understand Tesco are seeking enhanced representation in the area, and are promoting the Toby Jug site to the south of the A3 roundabout for a large foodstore, which is described in more detail below.

Customer Views and Behaviour

- 7.35 Out of the three district centres, Tolworth was the least popular, with 3% of respondents identifying it as the district centre which they visited most often. With respect to frequency, approximately 42% of respondents said that they visited the centre between once a week and once a fortnight. When asked why they chose to visit Tolworth, the most frequent response was that it was close to home (37%). Other respondents identified the Marks & Spencer's as a key attraction (17%), as well as a good range of chain stores (13%), proximity to work (11%) and that it is easy to park (8%). Out of the three District Centres, Tolworth had the lowest 'satisfaction rate', which the survey indicates is partially linked to the relatively unattractive environment.

Retail Frontage

- 7.36 The shopping frontage in Tolworth is identified in the Kingston Core Strategy, extending from the roundabout junction between the A3 and Tolworth Broadway (A240), northwest to Ewell Road. There has been a recorded decrease in the proportion of (Class A1) retail uses occupied across all district centres, since 2004. In Tolworth, the Council's latest AMR shows that the percentage of A1 uses dropped from just below 70% in 2005 to just above 55% by 2008. Recently, the proportion of Class A1 uses has been increasing and currently account for 62% of the shopping frontage in Tolworth, the highest of the three district centres.

Investment and Development Sites

- 7.37 As well as retailer demand, there are also signs of private investment in the centre. The former Red Lion Pub at the northern end of the District Centre is currently being developed for 50 flats and two new A1 units. Tesco is also promoting an application for a large new foodstore on the Toby Jug Site directly opposite Tolworth Roundabout. This is a strategically important site which, subject to provision of suitable linkages with the town centre, could enhance linked trips and help to 'anchor' the southern end of the district centre.
- 7.38 Tolworth will soon benefit from significant new public realm improvements to the centre which will significantly improve the shopping environment and help to support both existing businesses as well as encourage new custom and trade. Work has recently commenced on major street improvements to Tolworth District Centre and the roundabout, which will deliver extensive public space improvements stretching along Tolworth Broadway (including the removal of the pedestrian guard rail). We anticipate that this will help to increase the attractiveness and accessibility of this area for pedestrians.

Tolworth District Centre Swot Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • High number of independent retailers; • Low vacancy rate, with no obvious clusters of inactivity; and • Visibility from strategic road network. 	<ul style="list-style-type: none"> • The Broadway results in a high level of traffic through the retail core, and hampers accessibility across the centre; • Railway station separated from centre by A3; • Lack of national multiples; • Relatively dated units; and • Centre disconnected from train station by A3.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Toby Jug development site; • Improvements to public realm and accessibility being delivered along The Broadway; and • Potential to increase representation of multiples. 	<ul style="list-style-type: none"> • Limited geographic catchment area compared to higher order centres; • Continued traffic through The Broadway; • Limited car parking facilities; • Ongoing pattern of polarisation towards larger centres; and • Strength of out of centre and online retailing.

New Malden District Centre

Conclusions of Previous Retail Studies

7.39 Before we undertake an updated health check, we briefly review the conclusions of the previous performance of the centre as recorded by the 2003 Retail Study and 2009 Retail Study Update, both undertaken by RTP.

Retail Study (January 2003)

7.40 As described above, the 2003 Retail Study did not include a traditional health check of existing centres, however some conclusions of the study are relevant to the consideration of the overall vitality of the centre. In comparison to other London district centres, the study found that New Malden had an 'above average' proportion of A1 floorspace. The study also assessed the results of retailer/business survey responses on the performance of the District Centres. For New Malden, the 2003 Retail Study found that:

- Traders were performing better than in Surbiton or Tolworth and on par with Kingston;
- Quality of public transport links, the ease of access to the centre for shoppers and the range of shops were seen as key strengths;
- Lack of sufficient car parking and the expense of parking were perceived as weaknesses;
- New Malden was perceived in equal proportions of traders to have improved/ deteriorated over the past five years; and
- The principle factor that would improve the town centre was an increase in shopper parking.

Retail Study (June 2010)

7.41 The 2010 Retail Study Update by RTP focused specifically on convenience provision in the centres. It found that:

- The convenience sector accounted for 21.1% of retail floorspace in New Malden, which was higher than the national average of 16.7%;
- With respect to convenience provision, six of the 20 convenience outlets in the centre were operated by national retailers (Waitrose, Iceland, Tesco (Express), Lidl and the Co-Op). There were no butchers, greengrocers or off-licenses;
- There was a high proportion of ethnic convenience retailers, accounting for seven units (of which three were Korean supermarkets);
- Comparison goods provision in the centre was below the national average, representing 30.6% of total floorspace compared to the average of 51.1%.

- The centre had above average provision of floorspace used for retail services (17.0% compared to 4.9%), financial services (10.0% compared to 7.7%), restaurants and cafes (14.3% compared to 9.2%); and
- Vacancies in the centre were below the national average, representing 5.5% of all units compared to the national average of 9.3%.

New Malden District Centre Audit 2013

Existing Provision / Competition

7.42 Overall, we consider that New Malden continues to be a healthy and active centre, with a strong ethnic offer which reinforces the centre's role as a district centre. Table 7.5 and 7.6 below shows the results of the latest town centre audit.

Table 7.5: New Malden District Centre Composition of Uses (Units), 2013

	No. of units	% of Total	UK Average (%)	Variance
Convenience	18	11.61	8.57	+3.04
Comparison	43	27.74	40.90	-13.16
Service	80	51.61	35.67	+15.94
Vacant	11	7.10	13.72	-6.62
Misc.	3	1.94	1.13	0.81
Total	155	100.00	100.00	

Source: GVA Audit (March 2013), UK Average from Experian Goad Summary Report.

Table 7.5: New Malden District Centre Composition of Uses (Units), 2013

	Floorspace (sqm)	% of Total	UK Average (%)	Variance
Convenience	6,420	20.28	17.26	3.02
Comparison	9,021	28.50	45.79	-17.29
Service	15,688	46.41	23.71	22.7
Vacant	920	2.91	12.22	-9.31
Misc.	604	1.91	1.03	0.88
Total	31,652	100	100	

Source: GVA Audit (March 2013), UK Average from Experian Goad Summary Report.

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- 7.43 The centre has an above average number of convenience units, with the centre accommodating a variety of multiple foodstore fascias in addition to its ethnic offer. However, units are relatively small and (other than the Waitrose) convenience stores here serve a primarily secondary and top-up shopping role. We consider that there would be a qualitative case to deliver a main food shopping destination here to anchor the centre.
- 7.44 The comparison goods offer in the centre falls well below the national average; however this is unsurprising bearing in mind the extensive out of centre offer of retail warehouses to the east of the centre and the proximity of New Malden to Kingston town centre. Comparison goods provision consists of a mix of both multiple retailers and independents, including Tudor Williams an independent three-storey department store. It is not realistic to expect New Malden to compete with the extensive out of centre floorspace and Kingston town centre. Instead, the centre should be encouraged to continue to evolve to support independent and ethnic retailers in order to serve the needs of the local community and capitalise on its own unique attributes as a commercial and leisure destination.

Accessibility

- 7.45 The PTAL rating throughout New Malden town centre is 3 (Moderate). New Malden train station provides services to local services via Clapham Junction to London Waterloo. New Malden is located within national rail zone 4. Eight bus routes serve New Malden, and the roundabout at the southern end of the High Street (at Kingston Road and Burlington Road) appears to serve as an important bus interchange. The nearest underground stations are Wimbledon (5.5km east) and Richmond (10km north).
- 7.46 New Malden is also highly accessible by car, lying directly north and west of the A3 which provides access to the M25 Orbital motorway to the south and central London to the north. The centre includes two large multi-storey car parks, however surface car parking is limited.
- 7.47 The town centre audit identified that the majority of footfall and pedestrian activity is along the southern half of the High Street, which has the greater concentration of multiple retailers (including Co-Op, Lidl, Boots, Costa) and the Post Office. The Fountain roundabout is also an important local bus interchange, which serves as a focus for additional pedestrian activity.
- 7.48 Despite the existence of the railway station, Waitrose and St. George's square to the north, this portion of the High Street appears to be less active than the southern half of the centre. This may be due to the lack of any strong pedestrian desire lines in this part of the centre.

Vacancies

- 7.49 Vacancies across the centre have fallen from 1,740 sqm in 2010 to 920 sqm in 2013. Vacant units now account for only 2.91% of total floorspace across the centre, which is well below the

national average of 12.22%. The number of vacant units has also fallen, and now accounts for 7.10% of total units, below the national average of 13.72%. This indicates that despite the economic recession and potential competitive pressures from other centres, New Malden remains an attractive commercial destination for both consumers and retailers. The results of the town centre audit shows that vacancies are spread out along the High Street.

Retailer Demand

7.50 As of March 2013, the Co-Star Focus Report for New Malden shows two outstanding retailer requirements for representation in the centre. These are for:

- 70 – 139 sqm for **Cook** (a chain of frozen, ready meal stores which recently opened a store in Surbiton District Centre), which has had a requirement since May 2012; and
- 74 – 186 sqm for **Café Nero** which has had a general requirement for sites in the south west London/ M25 area since June 2012.

7.51 There are a few vacant units which appear to meet the overall size requirements, however they may be unsuitable for various operator-specific grounds (such as location, layout, orientation, etc). This should be monitored to understand whether there is any gap between supply and demand.

Customer Views and Behaviour

7.52 Out of the three district centres, New Malden was the most popular, with 12% of respondents identifying it as the centre which they visited most often. With respect to frequency, approximately 42% of respondents said that they visited the centre between once a month and once every two to three months.

7.53 When asked why they chose to visit New Malden, the most frequent response was that it was close to home (30%). Other respondents identified a good range of chain stores (25%), good range of independent stores (15%), and food shopping (12%).

Retail Frontage

7.54 In New Malden, the shopping frontage is defined in the Core Strategy Proposals Map extending along New Malden High Street to part of Coombe Road in the north. The Council's most recent AMR shows that the proportion of the primary shopping frontage which was occupied by A1 uses was around 70% in 2006 but fell to less than 55% in 2007 coinciding with the start of the 'credit crunch'. The proportion of A1 uses now accounts around 60% of the primary shopping frontage in New Malden.

Investment and Development Sites

7.55 Cook’s Crescent presents a significant development opportunity which could help increase connectivity across the centre and bring forward a new site for significant redevelopment. As part of the New Malden Town Centre Strategy, the Council has recommended that a review of the Cocks Crescent Area Development Brief to promote a comprehensive approach to developing the area, using a design-led approach to secure development that supports and strengthens the role of New Malden as a District Centre and enhances its vitality and viability. We consider that this site represents a key opportunity to improve retailing in the centre.

7.56 The New Malden Town Centre Strategy should also be used to encourage public realm improvements to the centre. In particular, we consider that the area surrounding the railway station should be improved to enhance this gateway to New Malden and make better use of the high footfall generated in this area. We understand that a monthly farmer’s market is held at St. George’s Square and we consider that other similar activities should be encouraged to help enhance this end of the high street. Physical improvements should create enhanced visual and physical linkages from the station to the northern end of the High Street St. George’s Square and Waitrose.

New Malden District Centre Swot Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Proximity to railway station and public access; • Good mix of uses, including high number of multiple convenience fascia; • Strong ethnic community, with good range of leisure services; and • Independent stores, including Tudor Williams. 	<ul style="list-style-type: none"> • Convenience goods offer is relatively small-scale and main food shopping facilities are limited; and • Lack of available surface car parking.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Cock’s Crescent development site; • Town Centre Strategy to create new improvements; and • Potential to improve railway station and St. George’s square. 	<ul style="list-style-type: none"> • Large scale of existing out-of-centre retail provision; • Perceived lack of car parking; • Ongoing pattern of polarisation towards larger centres; and • Strength of out of centre and online retailing.

Edge and Out of Centre Retail Provision

- 7.57 The main out of centre retail provision in the Borough comprises an edge of centre Sainsbury's at Sury Basin, an out of centre Asda on London Road and retail warehouse units at Kingston Road. In addition, there is a concentration of out of centre retail warehouse units to the east of New Malden, which are located out of centre and which fall within the London Borough of Merton. Due to their proximity to New Malden, the retail units at Shannon Corner, Burlington Road and Beverley Way have a significant influence on shopping patterns in the survey area, and are key retail attractors in their own right (see Section 8 for further analysis of shopping patterns).

Conclusions of Previous Retail Studies

Retail Study (January 2003)

- 7.58 The 2003 retail study anticipated that, at the time of the survey, the market share achieved by Sainsbury's at Sury Basin reflected its settling down period and is therefore likely to adjust upwards over time. An exit survey was conducted at the Sainsbury's store to establish shopping patterns since the store opened in November 2001. The survey found that the store caters predominately for the local catchment area; the shopper's principal reason for visit was the close proximity to home.
- 7.59 The report concluded that the impact of the Sainsbury's development has principally fallen on the Asda at Norbiton and Tesco at New Malden as well as the stores in Kingston town centre. A quarter of those who shop at Sainsbury's Sury Basin also undertake linked trips between the foodstore and Kingston town centre. The majority of these people are non-car borne and travel by foot.
- 7.60 At the time the 2003 retail study was undertaken the store now occupied by Asda, was trading as a Somerfield supermarket and was not specifically assessed as part of the study.
- 7.61 The Study found that for bulky comparison goods (furniture, carpet and electrical), town centres such as Kingston, Central London, Epsom and Guildford were dominant. Stores such as John Lewis outperformed retail warehouse units for these types of goods. For DIY products, stores such as Homebase and B&Q in locations near New Malden and Croydon achieved the highest market shares.

Edge and Out of Centre Retail Provision 2013

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- 7.62 It is evident that the out of centre retail provision within the Borough is concentrated to the east of Kingston town centre. In addition, there are several concentrations of retail warehouse units outside New Malden district centre, within the London Borough of Merton.

Sainsbury's Sury Basin

- 7.63 Sainsbury's at Sury Basin is located directly to the north of Kingston town centre, and is considered to be an edge of centre foodstore. The foodstore comprises 3,808 sqm retail floorspace, of which c. 80% is used for the sale of convenience goods. The store includes deli, salad, bakery, hot food, fish, butches, pharmacy and florist counters. The store opened in a purpose built development, comprising the foodstore and a gymnasium, in December 2001. The store has parking provision for circa 450 cars and is located within approximately 9 minutes walking distance of Kingston town centre. The car park has 30 minutes free parking facilities.

Asda London Road

- 7.64 Asda at London road is located east of Kingston town centre, and is considered to be an out of centre foodstore. The foodstore comprises 1,773 sqm retail floorspace, of which c. 85% is used for the sale of convenience goods. The store includes a bakery and hot food counter. This development opened as a conversion in May 2005, replacing the former Somerfield store. The foodstore is within a development comprising Boots Pharmacy and car parking. The foodstore is accessed from the car park through an archway and shielded by trees and vegetation at the roadside. The car park provides for circa 180 cars and has 2 hour free parking facilities. Kingston is within approximately 11 minutes walking distance of the store.

Kingston Road Retail Park

- 7.65 Kingston Road Retail Park is located approximately 2 km south east of Kingston town centre and comprises 5,445 sqm net retail floorspace. The current operators within the retail park are Homebase, Carpetright, Furniture Village, Dreams and Matalan. There is no food or drink provision within Kingston Road Retail Park.

Retail Parks Outside New Malden

- 7.66 There are a cluster of bulky goods retail warehouse units located outside New Malden District Centre. We summarise the retail provision in these retail parks below.
- 7.67 Shannon Corner Retail Park does not fall within the Royal Borough of Kingston Upon Thames, however the retail park is situated in close proximity to New Malden district centre. The retail park is located on Burlington Road between Raynes Park and New Malden in the London Borough of Merton. The retail park comprises 2,247 sqm net retail floorspace and the current

operators are DFS, Carpetright and Harveys. There is no food or drink provision within Shannon Corner Retail Park.

- 7.68 The majority of the retail units located at Burlington Road fall within the London Borough of Merton. For the purposes of this study we have grouped these units together as units falling outside the Royal Borough of Kingston upon Thames. Burlington Road Retail units are located adjacent to Shannon Corner Retail Park. The retail park comprises c. 12,170 sqm net floorspace. There is current one vacant unit within the retail park and the current operators are B&Q, Corals, Furniture, Maplin and Currys/PC World. The B&Q Extra unit is a large store, comprising over 9,000 sqm net floorspace. The B&Q Extra eco-style store opened in 2009. There is no food or drink provision within Burlington Road Retail Park.
- 7.69 Within close proximity to Burlington Road Retail Park, at Beverley Way, there are two standalone retail warehousing units. These units are currently occupied by Halfords (664 sqm net) and Paul Simon (215 sqm net).

Summary of Edge and Out of Centre Provision

- The main changes in out of centre foodstore provision is that Asda is now trading from the former Somerfield unit on London Road, and trading patterns at the edge of centre Sainsbury's, Sury Basin, are now considered to have settled down.
- In terms of retail warehouse units, there remains a high concentration of bulky goods units around the New Malden area. There have been changes to the tenant mix of retailers operating from some of the retail warehouse units. In addition, since the previous study, B&Q have developed at new large DIY store near New Malden.
- The current out of centre retail warehouse units provide a strong comparison goods offer, particularly for bulky goods retail.

8. Retail Need Assessment

8.1 This section outlines the quantitative assessment methodology used to identify shopping patterns and quantitative retail need. Using the results of the household telephone survey (2013) we provide an analysis of shopping patterns arising in the survey area. The current performance of convenience and comparison goods floorspace across the Royal Borough of Kingston upon Thames is then used as the basis for forecasting the need for additional retail floorspace across the Borough to 2028 (incorporating interim years of 2018 and 2023).

Quantitative Assessment Methodology

8.2 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the household telephone survey (2013) of existing shopping patterns to model the existing flows of available expenditure to centres in Kingston. We also identify the main competing centres which have an influence on shopping patterns in the Borough. To develop the baseline position we have:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode and ward areas comprising the Kingston catchment area;
- Allocated the available projected expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone survey of shopping patterns so as to provide estimates on current sales and forecasts of future sales;
- Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities/performance in each shopping destination.

8.3 Building on the baseline position, we have explored the need for further convenience and comparison retail floorspace within the Borough, having regard to the performance of existing floorspace. The final section of this report (Recommendations, Section 9), sets out the locational options for meeting the global need arising for additional convenience and comparison goods over the plan period.

Data Inputs

Survey Area and Household Telephone Survey

8.4 In order to identify shopping patterns in Kingston, GVA commissioned a new household telephone survey covering 1,500 households across 15 survey zones. GVA designed the survey questionnaire in consultation with the Council and NEMs market research company who undertook the interviewing and data processing in April 2013.

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- 8.5 The household telephone survey area is illustrated in Plan 1 and has been designed, where possible, to retain the former survey area and zones used in the previous 2002 telephone survey. Some changes have been made to the survey zones, particularly in the central and western areas to provide a more fine grained analysis of shopping patterns within the Borough's town and district centres (sub-zones 1a to 1e). In addition zones 10 and 11 have been designed to reflect existing key arterial routes to Kingston town centre.
- 8.6 The boundary for survey zone 1 is based on the Borough boundary. The sub zones within zone 1 (zones 1a-1e) have been based on groups of wards within the Royal Borough of Kingston upon Thames. The remaining zones outside the Borough have been based on postal sectors.
- 8.7 The household telephone survey results (2013) identify shopping habits of households for both convenience and comparison goods. Where necessary, survey results have been rebased to remove some responses (such as 'don't shop for particular goods' and 'internet shopping') to ensure consistency with categories excluded in the expenditure projections.
- 8.8 For convenience goods, the household telephone survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% main food / 30% top-up food). This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.
- 8.9 The household telephone survey also included six questions on specific comparison goods types which coincide with Experian Business Strategies definitions of comparison goods expenditure. The exercise uses the weighted averages of the household telephone survey results for each goods type based on the proportion of per capita spend on that goods type. This process establishes the pattern of spending for residents of each zones in terms of the following goods types:
- Clothing and footwear;
 - Furniture, floor coverings and household textiles;
 - DIY and decorating goods;
 - Domestic appliances;
 - Electrical appliances; and
 - Personal and luxury goods.
- 8.10 Fashion shopping patterns in this outer London Borough are likely to be influenced by other higher order competing centres like the West End, or purpose built shopping centres such as
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Westfield London. The household telephone survey included questions to establish the first choice and second choice shopping destinations used by respondents to undertake clothing and footwear shopping. Responses for first and second choice shopping destinations for fashion shopping have then been weighted in order not to overstate the trade drawn from the first choice shopping destination in the survey area, as the second choice shopping destination will also draw some trade from the survey area. A 70:30 weighting has been applied for first and second choice clothing destinations respectively.

Market Share Assumptions

Comparison of Telephone Survey Market Shares

- 8.11 Market shares for the centres inside and outside the telephone survey area have been obtained from the results of the 2013 household telephone survey. In order to verify the 2013 survey results, we have undertaken a 'sense check'; comparing the most recent market shares with those derived from the previous household telephone survey (2002).
- 8.12 The 2002 telephone survey results identify market shares for non-bulky, bulky and DIY goods shopping goods. Detailed analysis of the 2002 and the 2013 survey (weighted, filtered and unadjusted results) indicate that Kingston town centre is achieving a slightly higher market share for non-bulky comparison goods shopping across the survey area. In zones 5 (Sunbury), 6 (Epsom) and 9 (Sutton), Kingston increased its market share for non-bulky comparison goods shopping (i.e. clothing and footwear and personal and luxury goods).
- 8.13 In the district centres of Surbiton and Tolworth, non-bulky comparison goods market shares based on the 2013 survey results remain at low levels, providing similar market shares to those identified in the previous survey. The 2013 survey results indicate that the market share of New Malden in 2013 has increased slightly in zone 1 over the last decade for non-bulky comparison goods. However, it is important to remember that extent of the survey area for zone 1 has been reduced for the purposes of the 2013 survey, and therefore the survey results are not directly comparable in this zone.
- 8.14 The West End has retained similar market shares across the survey area in the 2002 and 2013 surveys, with the exception of zone 8 (Wandsworth). Within zone 8 market shares for clothing and personal/luxury goods have decreased by 13 and 12 percentage points respectively against the 2002 non-bulky comparison goods market shares. It is likely that this market share has been drawn towards Westfield London which was not built at the time of the 2002 household telephone survey.
- 8.15 For DIY goods market shares, there is more variation between the two survey results. For DIY shopping, the 2002 survey results identified no market shares for the district centres of Surbiton,

New Malden and Tolworth, and very limited market shares for Kingston town centre. The main destination for DIY shopping in 2002 were the 'New Malden suburbs', which include the retail warehouse units outside New Malden district centre. The 2013 survey results identified much higher market shares for DIY goods for Kingston and New Malden, for example in zone 1, Kingston town centre achieves an 11% market share and New Malden achieves 14%, as well as strong market shares for the New Malden retail parks. Whilst the new B&Q store outside New Malden (which has opened since the 2002 survey) is likely to have attracted a higher proportion of DIY shoppers to this area, there have been no significant DIY store developments within New Malden district centre which could account for this significant increase in market share for these types of goods.

- 8.16 Similarly to DIY goods, the market share results for bulky comparison goods also vary between the 2002 and 2013 survey results. In 2002, Surbiton and Tolworth achieved no market share for bulky comparison goods, New Malden achieved a modest market share (e.g. 4% in zone 1) and Kingston town centre drew a strong market share (e.g. 50% in zone 1). The 2013 results indicate that Kingston town centre and New Malden district centre are both achieving higher market shares for shopping for furniture, domestic and electrical appliances (e.g. Kingston draws 64% market share for electronic goods in zone 1, and New Malden draws 9% for furniture goods in zone 1).

Manual Adjustments to Market Shares

- 8.17 Some adjustments have been made to these market shares in order to more accurately reflect what we consider to be the likely extent of market shares across the survey area, and to amend anomalies in the survey results. These adjustments have been based on our extensive experience and professional judgement, and are explained in further detail below.
- 8.18 Analysis of the household telephone survey results (2013) reveal that the market shares achieved in respect of the district centres may be overstated for New Malden and understated for Surbiton and Tolworth. Close analysis of the survey results compared to the 2002 survey results highlight that in zone 1, New Malden is identified as achieving market shares as high as 16% for furniture goods (in zone 1c), 25% for DIY goods (in zone 1d), 14% for domestic appliances (in zone 1d) and 14% for electrical appliances (in zone 1d).
- 8.19 On review of the retail provision in New Malden, there are only 5 retail units selling goods which may fall within these product ranges (Buran Craftesmen DIY, Unilet Sound and Vision Home Entertainment, New Malden Carpet Centre, Tudor Williams Department Store and The Drapers Textile Store). We consider it unlikely that these stores provide such a strong bulky goods type retail attraction. We consider it is more likely that these respondents to the household telephone survey which stated that they shop in New Malden for these goods, are actually referring to retail warehouse parks in the New Malden area. As a result of the limited bulky retail

provision in New Malden we have reduced the baseline market share figures for New Malden by 80% for furniture products, 90% for DIY and 60% for domestic and electrical appliances. These market shares reductions from New Malden have then been redistributed as market shares for retail warehouses located outside New Malden district centre (in the London Borough of Merton).

- 8.20 GVA also consider that the market shares for Surbiton and Tolworth may have been slightly understated by respondents to the household telephone survey. These district centres provide a more limited comparison retail offer than higher order centres such as Kingston, the West End and Sutton. However smaller and more infrequent comparison goods purchases will be made in these centres, and therefore we have manually adjusted market shares in zones 1a-1e; taking between 2% and 7% market share from Kingston town centre and increasing the market shares of Surbiton and Tolworth by between 1% and 5%. Appendix 3, Table 4 sets out the adjusted market shares for the survey area.
- 8.21 Overall, the adjustments made to the 2013 household telephone survey findings have resulted in market share figures which, in our opinion, more accurately reflect likely shopping patterns, in light of the previous survey results as well as our understanding of retailing in the local area.

Estimates of Population in the Survey Area

- 8.22 Population estimates and forecasts for the Kingston sub zones (1a-1e) have been derived from population estimates for the Royal Borough of Kingston upon Thames based on GLA Ward Level Population Projections 2012 Round (SHLAA, standard fertility). Population estimates and forecasts for each of the remaining survey zones have been prepared using the Experian E-Marketer in-house system, which are based on revised ONS population projections (projected from the 2011 Census results). Overall, the ward and postal sector boundaries are broadly consistent. Where ward and postal sector boundaries have slightly overlapped (for example in zones, 3, 8, 9 and 11), total population figures have been proportioned appropriately to these zones.
- 8.23 Overall, the population of the survey area (zones 1-11) in 2013 is currently 1,473,407. It is forecast to grow to 1,565,158 in 2018, rising to 1,643,733 in 2023 and again to 1,710,684 in 2028. This represents an increase in population in the survey area of 16%. This is similar to the projected population increase for the Borough as identified in the London Plan. The London Plan identifies that there will be between 0-18% population growth between 2006 and 2031 in the Royal Borough of Kingston upon Thames and the surrounding boroughs of Hounslow, Richmond, Merton and Sutton. The London Borough of Wandsworth is estimated in the London Plan to be subject to a higher population increase of between 18-36% over the same period.

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- 8.24 The most up to date evidence available from the GLA indicates that population growth projections in London are likely to increase at a higher rate than identified in the evidence base supporting the London Plan. The London Plan projections show that by 2016 London will have a population of c.8.06 million people. However the GLA Population Projections (2012 Rounds SHLAA based) indicate that the population by 2016 could reach c.8.7 million.
- 8.25 Population growth across the survey area varies between zones from 7% to 24% over the plan period. Within the Royal Borough of Kingston upon Thames, the Council estimate that population will increase from 162,100 to 175,100 (growth of 8%). This is a modest level of growth, based on the results of the latest GLA Population Projections. Outside the Borough, population levels are projected to grow at increased rates, particularly within zones to the north of the Borough (e.g. zones 3, 4, 8 and 9). We would expect zones towards central London to have higher population projections than those in outer London. It is also important to note that the population figures outside the Borough have been based on different population sources and therefore there may be slight inconsistencies between the Borough population growth levels.

Available Expenditure in the Survey Area

Deductions for Special Forms of Trading (SFT)

- 8.26 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure in 2011 prices. Deductions for Special Forms of Trading (SFT) have been made, which represent expenditure not available to spend in shops (for example internet or catalogue shopping). The telephone survey results indicate that the internet has a significant influence on shopping patterns in the survey area. This is corroborated by the Retailscape Experian research set out in Section 5 of this report (Table 5.5), which demonstrates that Kingston has the highest likelihood shopper profile to buy online, in comparison to other London destinations such as the West End and Westfield London.
- 8.27 For convenience goods, the weighted (non-filtered) survey results indicate that approximately 3.7% of all respondents use the internet to undertake their food shopping (weighted 70% main food / 30% top up food shopping), which is higher in comparison to Experian estimates for SFT deductions of 2.3%. The 2013 survey results indicate that 5.1% of respondents use the internet do undertake their main food shopping, and that proportions of residents who undertake their main convenience goods shopping online are particularly high in zones 1b (Surbiton 11.9%), 1a (Kingston 9.9%), 2 (Richmond 9.1%), 1e (South of the Borough 8.4%) and 1c (Tolworth 8.3%).
- 8.28 For comparison goods, the weighted (non-filtered) survey results also demonstrate the strength of influence of the internet on shopping patterns, varying from 4.7% (clothing goods), 5.3% (furniture goods), 12.4% (electrical appliances), 12.7% (domestic appliances), and 18.4% (personal and luxury goods). The weighted average in the survey area for comparison internet

market share is 9.9%, which is in line with Experian forecasts of SFT (which are currently 10.7%). For the purposes of this assessment we have tested the implications of a higher proportion of spend being drawn by the internet for comparison goods, to reflect significant influence online retailing is likely to have on Kingston town centre and to provide a robust assessment of minimum available spend to support new comparison floorspace over the plan period. The deductions applied by GVA for SFT for convenience and comparison goods in the survey area are set out in Table 2 of Appendix 7 and 8.

Growth Rates and Available Expenditure

- 8.29 To these figures we have applied expenditure growth rates for convenience goods of 0.1% between 2011 and 2012; -0.1% between 2012 and 2013; 0.5% pa from 2013 to 2018; and 0.8% pa from 2018 onwards. For comparison goods, we have used expenditure growth rates of 1.4% for the period 2011 to 2012; 1.8% pa for the period between 2012 and 2013; rising to 2.8% pa between 2013 and 2018; and 2.9% pa from 2018 onwards. These growth rates are based on the latest economic forecasts published by Experian Business Strategies (Retail Planner 10.1, September 2012).
- 8.30 These growth rates reflect that we expect spending on comparison goods to grow faster than convenience goods, as the scope to purchase more food is limited. These assumptions take into account current economic circumstances and the effects of the recession, which have had a significant impact on forecast levels of growth expected over the period to 2028. As a result, the expenditure growth rates used in this study are less optimistic than those used in the previous retail studies (as discussed previously in Section 3).
- 8.31 Taking these considerations into account, expenditure has been generated within each zone to highlight variations across the survey area, and then using the growth rates above and deductions for SFT, expenditure figures have been grown to five year periods; 2018, 2023 and 2028. These five year intervals represent 5 year forecasting periods as required by the NPPF.
- 8.32 Appendix 2, Table 3 applies per capita expenditure within each zone to the population forecasts, which indicates that total available convenience goods expenditure within the survey area at 2013 is £2.97bn. This is forecast to grow to £3.20bn by 2018, rising to £3.46bn by 2023, to a total of £3.75bn by 2028. This equates to an overall growth of £780m (21% growth) between 2013 and 2028.
- 8.33 Comparison goods expenditure within the survey area at 2013 is £4.53bn. This is forecast to grow to £5.33bn by 2018, increasing to £6.30bn by 2023, to a total of £7.56bn by 2028. This equates to an overall growth for comparison goods expenditure in the survey area of £3.03bn between 2013 and 2028 (40% growth) (Appendix 3, Table 3).

Floorspace Data

- 8.34 The comparison and convenience goods floorspace data used in the capacity modelling has been drawn from the Institute of Grocery Distributions (IGD), Royal Borough of Kingston upon Thames (Shop Survey 2001) and Experian Goad.
- 8.35 For Kingston town centre, we have used the same baseline comparison goods floorspace figure as used in the previous studies (164,739 sqm net). This figure was originally sourced by the Royal Borough of Kingston upon Thames Shop Survey (2001). Since this time there have been no significant increases in retail floorspace in the town centre. Whilst there may have been some internal changes to floorspace provision within shop units or the change of use of retail to alternative uses in the fringe areas of the town, we consider that the comparison goods floorspace in the town centre is unlikely to have changed drastically. The 2001 Shop Survey figure is significantly higher than the comparison goods floorspace identified in the town centre by Experian Goad. However, this excludes floorspace provided on upper levels in the centre (e.g. the floorspace of the upper levels of the Bentall Centre and John Lewis, inter alia, have not been counted). For consistency, we have used the higher floorspace figure used in previous retail studies.
- 8.36 Our floorspace assumptions for the foodstores include adjustments, where necessary, to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace; we have adjusted the net floorspace to identify the proportion of sales floorspace allocated for convenience goods. These assumptions have been informed through site visits of the main foodstores in the Borough. This accords with the expenditure data and the expenditure assumptions used.

Benchmark Sales Densities

- 8.37 For convenience goods sales densities we have used a benchmark of £13,000 per sqm net for large retailer operators (Tesco, Asda, Sainsbury, Morrisons, Waitrose and Marks and Spencer). The latest available published sales densities (Verdict) date back to 2010 and are therefore increasingly unreliable. However, the Verdict data identifies that company average sales densities for foodstores vary between £15,390 per sqm net for Asda and £10,833 per sqm net for Marks and Spencer. For local stores (including Co-op and Iceland stores), we have assumed that these stores are achieving a sales density of £6,500 per sqm net.
- 8.38 In this outer London location, we consider that foodstores are likely to be trading at, if not significantly above, company average levels. Section 5 identified the strength and affluence of the Kingston catchment area, and therefore it is likely that existing stores are performing at higher levels than notional UK average benchmarks. Accordingly, benchmark sales densities use for convenience goods are set out in Appendix 2, Table 10.

- 8.39 For comparison goods we have used a benchmark sales density of £7,000 per sqm net for development within Kingston town centre, and a lower benchmark of £6,000 per sqm net for retail within the district centres. We consider that the use of these benchmarks accurately reflect the different comparison goods shopping roles performed by the retail hierarchy in the Borough.
- 8.40 We would not expect new comparison goods floorspace coming forward in Kingston town centre to reach current average sales densities achieved in the town centre (c.£10,000 per sqm) for the following reasons:
- There is a propensity for household telephone surveys to overestimate the turnover of larger centres (paragraph B.34 of the PPS4 Practice Guidance);
 - The development of modern floorspace is usually delivered in larger floorplate units. As such, lower sales densities are likely to be achieved compared to existing sales densities due to the dilution of trade over a wider comparative area; and
 - It often takes new floorspace time to reach potential trading levels.
- 8.41 At present, the district centres are achieving sales densities of between £1,500 per sqm net and £6,600 per sqm net for comparison goods. We have used a benchmark sales density of £6,000 per sqm net for new comparison floorspace. We consider this is an appropriate sales density for new comparison goods floorspace in district centres in greater London, because we expect the provision of such floorspace would be of a higher quality and achieve higher levels of sales than the existing small scale, predominantly independent, retail units located in these district centres.

Convenience Goods Shopping Patterns

Kingston Foodstores

- 8.42 We have estimated the trade draw of Kingston town centre for convenience goods (Appendix 2, Table 4). This breaks down the trade drawn from in centre stores (Sainsbury's, Waitrose, Marks and Spencer and other local stores) and edge and out of centre stores (Sainsbury's Sury Basin and Asda London Road) in Kingston.
- 8.43 Plan 7a illustrates the strength of market share arising from the in centre foodstores and Plan 7b illustrates the strength of market share arising from edge and out of centre foodstores. Combining these plans together, Plan 7c provides an indication of the strength of Kingston's total convenience goods market share. Kingston is located in zone 1a and within this zone the in and out of centre foodstores draw a 76% market share, which is a very strong level of trade retention. Plan 7c shows that the Kingston foodstores have a reasonable market share from the

surrounding zones 1b, 1c, 1d, 2 and 10, and a more limited influence of shopping patterns beyond this (zones 1e, 3, 4, 6, 8, 9 and 11).

- 8.44 Within Kingston town centre, Waitrose Wood Street foodstore draws the highest market shares (7% from zone 1a), however it is evident that edge and out of centre foodstores have a greater influence on shopping patterns. For example the Sainsbury's Sury Basin draws a 39% market share and Asda London Road draws an 18% market share within zone 1a (Appendix 2, Table 4).
- 8.45 The household telephone survey results indicate that Waitrose Wood Street has a total convenience goods turnover of £46.9m (Appendix 2, Table 5). Based on an estimated convenience floorspace of 2,296 sqm net, this equates to a sales density for Waitrose of circa £20,442 per sqm net, which indicates that the store is performing strongly against benchmark sales densities. This is corroborated by the Kingston town centre audit which identified that the store was busy and trading well, benefiting from high levels of footfall from John Lewis and shoppers using the shared John Lewis car park.
- 8.46 In addition the Sainsbury's Eden Walk is currently performing well, achieving a total convenience goods turnover of £18.3m (Appendix 2, Table 5). Based on an estimated convenience goods floorspace of 842 sqm net, this equates to a sales density for Sainsbury's of £21,720 per sqm net. Despite the poor and dated appearance of the Sainsbury's Eden Walk, the store was busy during the time of the site visit, and the narrow aisles and low ceilings gave the appearance of the store being congested.
- 8.47 The Marks and Spencer foodhall on Clarence Street has an estimated turnover of £21.2m which equates to a sales density of £21,416 per sqm net. The town centre audit identified that the Marks and Spencer foodhall appeared to be trading well, and was particularly busy during lunch times. Comparing the performance of these stores to company average benchmarks, it is evident that Sainsbury's and Marks and Spencer perform strongly in both quantitative and qualitative terms.
- 8.48 Other local convenience stores include Tesco Express, Lidl and other independent food retailers in Kingston. These stores overall draw a low market share of 4.6% in zone 1a and very limited market shares across other zones which equates to a total turnover of c.£6.6m. This is a relatively low turnover for local stores. However, the actual turnover of these stores may be higher after taking account of their top-up food shopping roles, which may have been underestimated by respondents to the household telephone survey. For example the Tesco Express by the train station (Cromwell Road), appeared to be very busy during the town centre audit, and we would expect this store to be achieving a higher turnover, although this store is likely to meet an element of commuter spend from those working in Kingston but living outside the survey area.

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- 8.49 Sainsbury's Sury Basin is an edge of centre foodstore which draws a market share of 39% within zone 1a and 5% from zone 2. Sainsbury's achieves an estimated turnover of £46.5m (Appendix 2, Table 5). This equate to a sales density of approximately £15,248 per sqm net, which is above our benchmark company average level, demonstrating Sainsbury's is trading well. Although during the time of the site visit (a weekday morning) the store appeared to be quiet, we expect that the store is busier during the early evenings and weekends when people undertake their main food shopping, making use of the extensive car parking.
- 8.50 The Asda London Road (out of centre) draws a strong market share of 18% in zone 1, and also has a reasonable trade draw from the other zones in the Borough, including 8% from zone 1d (New Malden), 4% from zones 1b and 1c and 2% from zone 1e and 3. As a result of the reasonably strong market share from across the Borough, the Asda achieves a higher turnover than the Sainsbury Sury Basin (£50.3m). This equates to a very strong sales density of £33,349 per sqm net against a company average benchmark of c.£13,000 per sqm net. This indicates that despite the dated appearance of the store Asda is performing strongly. This is corroborated by the town centre audit which identified lots of customers in the store, with some long queues at the checkout.
- 8.51 Overall, we estimate that the total convenience goods turnover of Kingston (including edge and out of centre foodstores) is £96.7m. Within the Borough (Kingston town centre's core convenience goods catchment), the foodstores account for approximately 65% of total available convenience goods expenditure within zones 1a-e. Based on a total sales floorspace of 13,543 sqm net, Kingston currently has an average convenience goods sales density of £13,876 per sqm net, which is slightly above benchmark levels.
- 8.52 The quantitative analysis indicates that Kingston is currently performing a strong convenience goods role. This is supported by the qualitative analysis of foodstore performance which found that Kingston town centre appears to be trading very well, and that there is an opportunity to enhance the convenience goods offer in order to reduce overtrading, although this is not considered to be a significant issue.

Surbiton Foodstores

- 8.53 Appendix 2, Table 4 sets out the estimated trade draw of Surbiton for convenience goods, including Waitrose and Sainsbury's supermarkets as well as 'other' local stores including Marks and Spencer and smaller convenience stores. Within the Surbiton zone (1b), the town centre foodstores achieve a very strong market share of 73% (Plan 7d). Surbiton also draws a high proportion of market share of 21% from zone 1c (Tolworth), 14% from zone 1e (south of the Borough) and 6% from zone 1a (Kingston). This is a very high level of trade retention and indicates that a significant proportion of spend is currently leaking from the Tolworth zone to Surbiton town centre.

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- 8.54 Waitrose is the strongest performing foodstore in Surbiton town centre, drawing a 37% market share from zone 1b, 12% from zone 1c, 8% from zone 1e and 5% from zone 1a. The store is achieving an estimated turnover of £54.9m. Based on an estimated convenience goods floorspace of 1,679 sqm net, this equates to a sales density of circa £32,682 per sqm net, which is significantly higher than the benchmark sales density for convenience goods (£13,000 per sqm net) and demonstrates that the store is performing very strongly and drawing a significant proportion of spend from outside the Surbiton zone, particularly from Tolworth. The town centre audit corroborates that the Waitrose store appears to be very well used, and was slightly congested.
- 8.55 Sainsbury's in Surbiton is also performing strongly, drawing over a quarter of market share within zone 1b (27%), as well as a 7% market share from zone 1c and 6% from zone 1e. The store achieves an estimated turnover of £30.5m and a sales density of £20,774 per sqm, which indicates that this store is also achieving strong sales and drawing trade from Tolworth. The Sainsbury's store was also identified to be very busy during the qualitative assessment, and benefiting from high volumes of footfall along Victoria Road from the station. The store was considered to be slightly congested.
- 8.56 Other local stores draw a market share of 9% from zone 1b. These foodstores principally cater for 'top-up' food shopping. The analysis estimates that local stores achieve a turnover of £6.6m, equating to a sales density of £4,746 per sqm net. This is a relatively good turnover for local and independent convenience goods stores.
- 8.57 Overall Surbiton achieves an estimated convenience goods turnover of £91.9m, which is approximately 3% of total available expenditure in the survey area. Based on a total convenience goods floorspace of 3,145 sqm net, this equates to a sales density of £29,234 per sqm net, which is significantly higher than the estimated convenience goods benchmark. This demonstrates the strength of the convenience goods offer in Surbiton, and the centre's dominance in relation to shopping patterns in the rest of the Borough, particularly in the Tolworth and south of the Borough zones which are leaking significant amounts of spend to foodstores in Surbiton. The town centre audits confirm that the stores in Surbiton are currently congested and overcrowded, particularly during peak food shopping hours.

Tolworth Foodstores

- 8.58 The trade draw for Tolworth district centre for convenience goods is broken down for Marks and Spencer, Iceland, Budgens and other local stores (including Tesco Express) in Appendix 2, Table 4. Within the Tolworth zone, the foodstores in the centre draw a 30% convenience goods market share, which although reasonable, is a significantly lower than the levels of convenience goods market share retention than Surbiton (which retains a market share of 73% from zone 1b). Plan 7e illustrates that the foodstores in Tolworth have a more limited influence

on shopping patterns in the immediately adjoining zones (6% market share from zone 1b, 5% market share from zone 1e and 3% market share from zone 1d). This indicates that existing foodstores in the town have a very localised catchment area.

- 8.59 Marks and Spencer is the strongest performing foodstore in Tolworth, achieving a market share of 17%, with a much more limited influence on shopping patterns in the rest of the Borough. Appendix 2, Table 5 indicates that Marks and Spencer achieves an estimated turnover of £16.0m. This equates to a sales density of £13,615 per sqm net which is above the benchmark sales density for main foodstores (£13,000 per sqm net) and indicates that the store is performing well, in line with expectations. The qualitative results of the town centre audit identify that the store is reasonably well used, but that the effectiveness of the store as a main food shop is impinged by limited car parking facilities.
- 8.60 In contrast, Iceland, Budgens and other local stores have a more limited influence on shopping patterns. It is evident that Iceland achieves the highest turnover (£4.3m), whilst Budgens and other local stores achieve significantly lower turnovers (£1.9m and £2.6m respectively). Whilst Iceland is estimated to achieve sales densities in line with company average benchmarks for local stores (circa £6,500 per sqm net), Budgens and other local stores are achieving low sales densities in comparison, and the town centre audit identified that these stores were very quiet and not performing significant shopping roles.
- 8.61 Overall, we estimate that the total convenience goods turnover of Tolworth is £24.8m, approximately 1% of total available expenditure in the survey area. Based upon a total convenience goods sales floorspace of 3,408 sqm net, Tolworth currently has an average convenience goods sales density of £7,278 per sqm net. This is a lower turnover and sales density than we would expect of a centre of this size, which indicates that overall Tolworth is not performing a strong convenience goods role. This is corroborated by the findings of the town centre audits which found the stores to be relatively quiet. It is evident that a significant proportion of available expenditure in this zone is currently leaking to Surbiton.

New Malden Foodstores

- 8.62 Appendix 2, Table 4 breaks down the estimated trade draw of New Malden district centre for convenience goods, looking at market shares for Waitrose, Co-op and other local stores (including Tesco Express, Lidl, Iceland and independent convenience goods stores, which provide a specialist Korean food shopping role). Our analysis demonstrates that New Malden retains a market share of 37% within zone 1d, which is a slightly stronger trade draw in its core zone than Tolworth, but lower than Surbiton. As illustrated in Plan 7f, New Malden draws a 6% market share from zone 1c, a 3% market share from both zones 1a and 3, and 2% from zone 9.

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- 8.63 Waitrose is the dominant foodstore in New Malden, drawing a 29% market share within the New Malden zone. The store has a more limited influence on shopping patterns in zone 1c. Overall, Waitrose is estimated to achieve a turnover of £29.7m from the survey area, which equates to a sales density of £25,736 per sqm net. This indicates that the store is performing very strongly, and at above benchmark company average sales densities (circa £13,000 per sqm net). The town centre audit of New Malden identified that the store appeared to be trading reasonably well, but that the poor store layout results in congestion, and that the store would benefit from expansion and/or reconfiguration.
- 8.64 The Co-op and other local stores draw smaller market shares than Waitrose, and the survey results indicate that these smaller stores perform more of a top-up food shopping role, rather than catering to main food shopping needs. The Co-op is achieving a turnover of approximately £6.2m, whilst the combined 'other' foodstores in the centre draw a total turnover of £17.9m. These stores are achieving a strong convenience goods sales density of over £8,681 per sqm net, which is above the estimated benchmark sales densities for local foodstores (£6,500 per sqm net). This reflects the strong Korean population in New Malden and the dominance of ethnic specialist stores which cater to these local needs. In addition, the Lidl supermarket just off the High Street was identified to be very busy and congested during the time of the site visit.
- 8.65 Overall, we estimate that the total convenience goods turnover of New Malden is £53.8m, approximately 2% of total available expenditure in the survey area. Based on a total convenience goods floorspace of 3,953 sqm net, this equates to a sales density of £13,620, which indicates that New Malden is performing strongly against benchmark levels. The very strong turnover of the Waitrose store and local stores means that overall New Malden is performing well. In qualitative terms, the town centre stores were found to be overcrowded during the time of the town centre audits.

Key Foodstores Outside the Royal Borough of Kingston

- 8.66 Appendix 2, Table 4 also identifies the estimated trade draw of foodstores located outside the Borough that have an influence on shopping patterns. There are four main supermarkets which draw over 5% market shares from the core Kingston zones (1a-e), all of which are out of centre. We assess the performance of these stores below.
- 8.67 Tesco Extra, Beverley Way at Raynes Park is located in zone 3 of the survey area, within the London Borough of Merton, close to the boundary of Royal Borough of Kingston and in particular New Malden district centre. The store is the largest supermarket in the survey area, providing over 7,800 sqm net retail floorspace, of which 60% is used for the sale of convenience goods (4,684 sqm net). The out of centre store includes an in store pharmacy, phone shop,

optician, travel money and tech support as well as click and collect and direct ordering services.

- 8.68 The Tesco Extra has significant influence on shopping patterns in the Borough; drawing market shares of 22% from zone 1d (New Malden), 13 from zone 1c (Tolworth), 11% from zone 1e (south of the Borough), 8% from zone 1b (Surbiton) and 3% from zone 1a (Kingston). The survey results indicate that the out of centre Tesco Extra, Raynes Park achieves a total convenience goods turnover of £96.9m from inside the survey area. In reality we would expect the store to also draw additional spend from beyond the survey area to the west, thereby increasing the performance of the store. This is corroborated by the findings of our site visit to the store which appeared to be trading very well and was busy. Based on the turnover of the store derived from the survey area, the store is achieving a sales density of at least £20,680 per sqm net, which is well above company average levels.
- 8.69 The Sainsbury's supermarket at Kiln Lane, Epsom is located out of centre in Epsom and Ewell Borough. The store is located within zone 6 of the survey area to the north east of Epsom town centre. The supermarket extends c.5,100 sqm net, of which c.4,000 sqm net (78%) is dedicated to the sale of convenience goods. The store provides a pharmacy, and offers clothing, homeware ranges as well as and click and collect services.
- 8.70 The store has a significant influence on shopping patterns in the south of the borough, particularly zone 1e (south of the Borough) where it draws an 18% market share, as well as zone 1c (Tolworth) where it draws a 5% market share. This is unsurprising taking into consideration the lack of main foodstore provision in the south of the Borough, and the close proximity of the store (approximately 12 minute drive from Chessington). The store achieves a total turnover of £92.9m from within the survey area, however we would expect the store to draw additional spend from outside the survey area to the south east. On the basis of the turnover of the store derived inside the survey area, Sainsbury's Kiln Lane is trading at c.£23,314 per sqm net, which is significantly higher than company average levels.
- 8.71 In addition to Sainsbury's Kiln Lane, the Tesco, Oxshott Road, Leatherhead also has a significant influence on shopping patterns in the south of the Borough. Tesco Leatherhead is an out of centre foodstore, located in zone 7 of the telephone survey within the jurisdiction of Mole Valley district council. The out of centre store is smaller in scale than other competing foodstores outside the Borough (c.2,300 sqm net, of which 63% (1,455 sqm net) is used for the sale of convenience goods). The store provides click and collect services as well as scan as you shop facilities.
- 8.72 Due to the location of the store, approximately 6 minutes drive from Chessington, the store draws a considerable market share of 11% from zone 1e (south of the borough). Overall, the store achieves a turnover of £36.7m from the survey area alone, and we would expect the store

to draw additional spend from outside the south of the borough. Overall the store achieves an average convenience goods sales density of £25,219 per sqm net, on the basis of turnover derived from the study area.

8.73 The Asda, Roehampton Vale is an out of centre foodstore located in the London Borough of Wandsworth, in zone 8 of the survey area. The store comprises 5,270 sqm net floorspace, of which 60% (3,162 sqm net) is dedicated to the sale of convenience goods. The store provides a pharmacy, as well as home, clothing and photo departments, as well as click and collect services.

8.74 Asda, Roehampton Vale has an influence on market shares in the eastern part of the Borough, achieving a market share of 5% from zone 1c (Tolworth), 4% from zone 1d (New Malden) and 3% from zone 1e (south of the Borough). Overall the store achieves a turnover from the study area of £89.8m, which equates to a sales density of £28,403 per sqm net. This indicates that the store is performing very strongly, and it is likely that the store also draws additional spend from outside the survey area to the east.

Convenience Goods Need

Global Convenience Goods Need

8.75 We have examined the capacity arising for further convenience goods floorspace at the global level for the Borough up to 2028, incorporating interim years of 2018 and 2023. It is important to note that capacity forecasts become increasingly open to margins of error over time and that longer term projections should be treated with caution. As such it will be necessary for the Council to update these forecasts over the Local Plan period.

8.76 GVA and the Council have only identified one convenience goods commitment coming forward in the near future; the edge of centre Red Lion Square development on Ewell Road, Tolworth (application reference 09/10155). We have factored in this development to come forward at 2018 (Appendix 2, Table 11).

8.77 In order to translate residual convenience goods expenditure into floorspace, we have assumed that mainstream foodstore operators would aim to achieve average benchmark sales densities of £13,000 sqm net. As is our normal practice, we have not prepared low and high sales density capacity forecasts, rather we have focused on the capacity available to support main foodstores. The forecasts are therefore conservative; if smaller operators and discounters come forward the amount of capacity available would be greater as such retailers trade at a significantly lower sales density. For example, we have assumed that local stores, such as Co-op stores and independent retailers trade at c.£6,500 per sqm net.

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- 8.78 Retail need for convenience goods floorspace is driven by forecasts of likely population growth and the resultant increase in available convenience goods expenditure within the survey area. By apportioning the current available expenditure to existing foodstores, based on market share patterns identified in the household telephone survey, it is possible to estimate the turnover of existing foodstores, as well as the proportion of convenience goods expenditure which is retained within the catchment area.
- 8.79 The performance of existing foodstores can then be assessed against benchmark averages to estimate whether foodstores are under or over trading. Whilst significant levels of overtrading can highlight a deficiency in levels of existing floorspace provision, and therefore a 'need' for new floorspace, strongly performing foodstores can also indicate inflated levels of capacity (for example in London where stores achieve particularly high turnovers, which do not necessarily indicate that the store is qualitatively overtrading). Qualitative indicators of overtrading are outlined in the PPS4 Practice Guidance and include noticeable overcrowding and congestion within stores.
- 8.80 Taking into consideration the growth in population and available retail expenditure, and deducting any expenditure to support committed convenience goods developments, retail need is forecast by calculating the residual expenditure available in the survey area (as a result of population and expenditure growth), and applying an average turnover sales density in order to convert this expenditure into quantitative retail need (sqm).
- 8.81 Based on the population and expenditure growth, the results of the detailed performance analysis of existing convenience goods floorspace in the Borough, and taking into account committed developments, Appendix 2, Table 12 identifies residual expenditure to support additional convenience goods floorspace over the plan period. This equates to £127.2m residual expenditure up to 2018, rising to £150.8m up to 2023, increasing to £178.5m up to 2028. This results to a significant extent from existing foodstores which are trading very strongly at above company average levels, rather than purely population and expenditure growth. This suggests significant scope for new foodstore development. However, it will be important to consider carefully the appropriate location(s) and impact of any new foodstore proposals.
- 8.82 Table 8.1 below converts the residual spend arising into convenience goods floorspace need across the Borough, using a benchmark sales density for new floorspace of £13,000 per sqm net. Table 8.1 also identifies the levels of convenience goods capacity arising in Kingston, Surbiton, Tolworth and New Malden. It is important to note that these figures provide indicative capacity forecasts. We set out detailed analysis of the capacity arising within each of these centres below, and provide a recommendation about the future distribution of this floorspace in Section 9 of this report).
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Table 8.1: Baseline GLOBAL (Borough Wide) Capacity Forecasts for Convenience Goods

	2018	2023	2028
GLOBAL Residual Expenditure (£000)	£127,240	£150,807	£178,530
GLOBAL Floorspace Capacity (sqm net)	9,739	11,428	13,394
Indicative Floorspace Capacity in Kingston	4,321	5,279	6,385
Indicative Floorspace Capacity in Surbiton	4,250	4,627	5,078
Indicative Floorspace Capacity in Tolworth	-639	-522	-400
Indicative Floorspace Capacity in New Malden	1,806	2,043	2,330

Source: Appendix 2, Table 12 -16

Kingston Convenience Goods Capacity

- 8.83 Appendix 2, Table 13 estimates that there will be surplus convenience goods expenditure to support further convenience goods floorspace in Kingston town centre between 2018 and 2028. Our projections indicate that by 2018 there will be £56.5m residual expenditure to support convenience goods floorspace, which is forecast to grow to £69.7m by 2023 and to £85.1m by 2028. We are not aware of any significant extant planning consents for additional convenience goods floorspace in Kingston town centre and therefore no committed developments have been included within the capacity projections.
- 8.84 Using a benchmark sales density of £13,000 per sqm net, and assuming constant market shares, there is capacity to support additional convenience goods floorspace in Kingston over the plan period; up to 4,321 sqm net up to 2018, rising to 5,279 sqm net up to 2023, to a total of 6,385 sqm net up to 2028. This capacity is largely as a result of overtrading foodstores (particularly Asda London Road, Sainsbury's Eden Walk and Marks and Spencer Clarence Street).
- 8.85 Over the plan period there is scope to maintain and improve Kingston's strong convenience goods performance in the Borough (zones 1a-1e), and to improve the quality in the convenience goods offer. As the main town centre in the Borough, new convenience goods development should be directed towards Kingston, including a range of convenience goods floorspace (supermarkets, independent retailers and enhanced farmers market), providing a range of high end, mid-market and value offers, to improve consumer choice in the Borough.

Surbiton Convenience Goods Capacity

- 8.86 Within Surbiton capacity for additional convenience goods floorspace has been identified up to 2028. We are not aware of any extant consents for convenience goods in Surbiton coming forward over the plan period.
- 8.87 Appendix 2, Table 14 sets out that by 2018 there will be £55.5m residual expenditure to support new floorspace, increasing to £61.1m by 2023, rising to £67.7m by 2028. Using a benchmark sales density of £13,000 per sqm net for main foodstores, and assuming constant market shares, this equates to capacity for 4,250 sqm net up to 2018, rising to 4,627 sqm net up to 2023 and to 5,078 sqm net up to 2028. The majority of the capacity arising in Surbiton is as a result of the overtrading foodstores in the town centre, which draw significant amounts of expenditure from outside the Surbiton zone, particularly from Tolworth.

Tolworth Convenience Goods Capacity

- 8.88 Capacity for additional convenience goods floorspace in Tolworth up to 2028 has been calculated in Appendix 2, Table 15. The projections take into account the commitment for an edge of centre retail unit at Red Lion Square, Ewell Road for 744 sqm net retail floorspace. We are aware of proposals for a Tesco foodstore to the south of the centre, however this has not been granted consent and therefore has not been included as a committed development.
- 8.89 We estimate that as a result of the undertrading of existing stores and the implementation of the committed development, there will be no residual expenditure arising to support any capacity for new convenience goods floorspace in Tolworth over the plan period. Notwithstanding this, there is significant leakage of trade from the Tolworth zone to out of centre foodstores, and therefore there may be scope for Tolworth to claw back convenience goods spend which is being drawn to out of centre destinations. Providing a new foodstore in Tolworth district centre may seek to promote more local and sustainable shopping patterns by reducing the need to travel to out of centre locations to undertake food shopping. In addition, there may be scope to rebalance trade patterns between Surbiton and Tolworth to promote more localised shopping.

New Malden Convenience Goods Capacity

- 8.90 Analysis of the capacity for additional convenience goods floorspace in New Malden up to 2028 is provided at Appendix 2, Table 16. We estimate that there will be residual expenditure to support further convenience goods floorspace in New Malden over the plan period: £3.6m residual expenditure up to 2018, increasing to £27m up to 2023, rising to £31.1m up to 2028. Using a benchmark sales density of £13,000 for main foodstores, this equates to capacity arising

for 1,806 sqm net up to 2018, rising to 2,043 sqm net up to 2023, increasing to 2,330 sqm net up to 2028.

- 8.91 This indicates that there is capacity for New Malden to strengthen and improve its convenience goods offer over the plan period to maintain and increase levels of trade retention within the local area to support sustainable shopping patterns.

Comparison Goods Shopping Patterns

Kingston Town Centre

- 8.92 Appendix 3, Table 4 identifies the estimated trade draw of Kingston town centre for comparison goods. As illustrated in Plan 8a, Kingston's market shares are strongest within zones 1a (68%), 1b (64%), zone 10 (55%), zone 11 (54%), zone 1d (52%), zone 1c (51%) and zone 1e (48%). Kingston also has a reasonably strong market share in all of the other survey zones. On the basis of current market shares, Kingston town centre retains approximately 34% of available comparison goods spend in the survey area. This is the highest level of retention of all the centres in the Borough and demonstrates the popularity and strength of Kingston as a shopping destination.
- 8.93 Kingston town centre has a turnover of £1.54bn derived from the survey area. The previous study identified that the level of inflow derived by Kingston town centre was 10%, and we consider that this level of inflow remains appropriate. Taking account a 10% inflow, the total estimated turnover of Kingston town centre is £1.71bn. Based on the total turnover for Kingston town centre, and an existing comparison goods floorspace of 164,739 sqm net, we estimate that Kingston town centre achieves a sales density of around £10,406 per sqm net. Based on our experience elsewhere, this is a high sales density, and as indicated previously, may be overstated by the survey. However, taking into consideration the strong position of the Metropolitan centre in comparison to other Metropolitan centres (as reviewed in Section 5 of this report), it is not surprising that Kingston performs very strongly.

Surbiton District Centre

- 8.94 The estimated trade draw of Surbiton district centre is identified in Appendix 3, Table 4 and Plan 8b. It is evident that Surbiton's market shares are strongest within its own zone (8%, zone 1b), whilst the centre also draws a more limited market share in zones 1a, 1c, 1d, 1e and 11. On the basis of current market shares, Surbiton retains a market share of 0.4% of available comparison goods within the whole survey area. Within the Borough, Surbiton achieves a market share of 5.3% of available expenditure from within zones 1a-1e.
- 8.95 Surbiton town centre achieves a turnover of £20.2m from within the survey area. We do not expect that Surbiton achieves significant levels of inflow from outside the survey area due to

the scale of the centre. Based on an existing comparison goods floorspace of 7,428 sqm net, we estimate that the town centre has a sales density of £2,713 per sqm net. Whilst this is lower than the sales density of Kingston town centre, this is unsurprising according to the different role, function and retail offer between these centres at present. We would expect that new comparison goods floorspace in the centre is likely to achieve higher benchmark sales densities as discussed in paragraph 8.42.

Tolworth District Centre

8.96 The catchment area of Tolworth is identified to be strongest in zone 1c (6% market share), with lower levels of market share in zones 1b, 1d and 1e (Appendix 3, Table 4). Plan 8c illustrates that Tolworth has a less significant or extensive influence on shopping patterns in the Borough in contrast to Surbiton and New Malden. Tolworth retains approximately 0.2% of comparison goods spend from within the survey area, and a 2.4% market share from within zones 1a-1e. This is a low level of market share and reflects the influence that higher order centres have on comparison goods shopping.

8.97 Based on a total turnover for Tolworth of £8.2m, and a total comparison goods floorspace of 5,672 sqm net, Tolworth achieves a sales density of 1,452 per sqm net. This is a low sales density for comparison goods floorspace and indicates that the centre is not currently strong performing a comparison goods shopping role.

New Malden District Centre

8.98 Appendix 3, Table 3 and Plan 8d identifies the catchment area of New Malden district centre. New Malden draws a market share of 8% within zone 1d, as well as more limited market shares from zones 1a, 1b, 1c, 1e, 3, 6 and 9. New Malden retains approximately 0.9% of available comparison goods spend from within the survey area, and a 5.4% market share of available spend from zones 1a-1e.

8.99 New Malden achieves a turnover of £40.4m from within the survey area. Based on a total comparison goods floorspace of 6,083 sqm net, this equates to a sales density of £6,646 per sqm net. This indicates that the town centre is performing strongly for a centre of this size.

8.100 As set out in paragraph 8.17, the market shares for New Malden for furniture, DIY and domestic and electrical appliances have been re-distributed to nearby retail warehouses to more accurately reflect existing (limited) provision in the District Centre in these sub-categories. This re-distribution of market share has no effect on global capacity projections as the model assumes that all floorspace currently trades at equilibrium, benchmark levels (e.g. there is no residual spending as a result of overtrading which is available to support new floorspace). This redistribution will reduce the proportion of capacity directed to New Malden based on

constant market shares, however since this floorspace should be redirected to town centres first in any case, the implications of this adjustment can be considered immaterial.

Out of Centre Retail Warehousing and Retail Warehousing Outside the Borough

- 8.101 The retail warehouse units at Kingston Road retail park in the Borough draw a market share of 3% from zone 1a, 2% from zone 1c and 1% from zones 1b and 1d. Overall the retail warehouse units achieve a reasonably strong turnover of c.£15.3m from the household telephone survey area.
- 8.102 The majority of retail warehousing provision is focused outside New Malden district centre, in the London Borough of Merton. On the basis of current market shares, we estimate that the combined turnover of the out of centre retail warehouse provision outside New Malden is £149.8m (including Shannon Corner retail park, Beverley Way retail units and Burlington Road retail parks). This equates to 3% of available comparison goods expenditure from the survey area, or 16% of available spend within the Borough (zones 1a-1e). This indicates that the retail warehouse units outside New Malden are drawing a higher proportion of available comparison goods spend, than the centres of Surbiton, Tolworth and New Malden combined (13.2).

Comparison Goods Capacity

Global Comparison Goods Capacity

- 8.103 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time. Drawing on the latest advice published by Experian (Retail Planner 10.1), we have assumed an annual growth in existing sales per sqm net of 2.1% between 2013 and 2018, 1.9% between 2018 and 2023 and 1.8% between 2023 and 2028.
- 8.104 We have factored in five known comparison goods commitments for additional retail floorspace: Primark, Eden Walk and John Lewis in Kingston town centre, Ellerton Road (Ewell Road North Local Centre) and Victoria Road in Surbiton. At this stage the end uses for the retail developments in Surbiton are not known, we have therefore assumed these units will come forwards for comparison goods. We have assumed that retail developments coming forward in Kingston town centre will trade at a sales density of £7,000 per sqm net, and that floorspace in Surbiton, Tolworth and New Malden will trade at a sales density of £6,000 per sqm net (see Appendix 3, Table 11).
- 8.105 Appendix 3, Table 12 identifies residual expenditure to support additional comparison goods floorspace over the plan period, on the basis of maintaining constant market shares (Scenario

A), this equates to £71m residual expenditure up to 2018, rising to £245m up to 2023, and to £527.6m up to 2028. In converting the residual expenditure into comparison goods floorspace, the amount of residual expenditure identified will be able to support different amounts of floorspace, depending on which estimates of sales densities of new floorspace are used. For example we consider that within Kingston town centre there is scope to achieve higher sales densities than the district centres of Surbiton, Tolworth and New Malden.

- 8.106 Table 8.2 below illustrates the baseline global comparison goods capacity arising in the Borough. These figures are based on constant market shares and factor in the above commitments, but do not take into account the utilisation of existing vacant floorspace.
- 8.107 We have applied a global sales density of £6,000 per sqm net in order to calculate the global comparison goods floorspace capacity arising. However, when estimating the indicative floorspace capacity arising in Kingston town centre, we have applied a higher, and more realistic sales density of £7,000 per sqm net. As such, the indicative floorspace capacities identified in Table 8.2 do not total the global floorspace capacity identified for the Borough. We set out detailed analysis of the capacity arising within each of the centres below.
- 8.108 In line with common practice, these forecasts assume that at the base year, demand and supply (as reflected in sales per sq.m) are currently in equilibrium. However, in the case of Kingston it is evident that there is pent up retailer demand, and the Town Centre has not attracted any major new non-food development since 1992. As a consequence, existing retailers are achieving very strong sales per sq. m, suggesting there is a latent capacity, above the forecasts identified in Table 8.2 which are driven by population and spending growth.
- 8.109 However, there is no generally accepted benchmark sales density available to quantify the extent of any latent capacity, and the extent to which the dilution of existing sales may be acceptable will depend on the scale and location of any new development, (in particular whether it is 'in or out of centre) and consideration of any specific impacts/displacement effects on different parts of the centre. On this basis, we recommend that the baseline figures should be taken to represent minimum requirements. We consider Kingston may be capable of supporting additional non-food retail floorspace over and above these figures, and/or supporting new development within a shorter timescale, subject to consideration of the scale, form, and location of the proposed development and consideration of any impacts on other parts of the centre and other centres.

Table 8.2: Baseline GLOBAL (Borough Wide) Capacity Forecasts for Comparison Goods (Constant Market Shares)

	2018	2023	2028
GLOBAL Residual Expenditure (£000)	£71,045	£245,017	£527,573
GLOBAL Floorspace Capacity (sqm net)	10,672	33,500	65,977
Indicative Floorspace Capacity in Kingston	9,038	27,801	54,444
Indicative Floorspace Capacity in Surbiton	-209	-27	271
Indicative Floorspace Capacity in Tolworth	49	128	244
Indicative Floorspace Capacity in New Malden	364	868	1,592

Source: Appendix 3, Table 12-16

Kingston Comparison Goods Capacity

i) Scenario A – Constant Market Shares

- 8.110 On the basis of Kingston maintaining its existing market shares from within and outside the survey area (Scenario A), we estimate that there is significant capacity arising in Kingston town centre to support additional comparison goods floorspace.
- 8.111 In assessing capacity for comparison goods we have factored in existing commitments for the extension of Primark, the reconfiguration of Eden Walk and the extension of John Lewis. These developments will provide an additional 4,554 sqm net comparison goods floorspace. Appendix 3, Table 13 identifies that based constant market shares and on sales densities of £7,000 per sqm net there will be capacity to support 9,038 sqm net up to 2018, increasing to 27,801 sqm net up to 2023, rising to 54,444 sqm net up to 2028.

ii) Scenario B – Adjusted Market Shares

- 8.112 Table 8.2 above and Appendix 3 (Tables 12-16) assume that Kingston town centre maintains its current market shares across the survey area between 2013 and 2028. As discussed in Section 5 of this report, we are aware that there are several large retail developments in the pipeline in key competing centres to Kingston town centre. If future development in Croydon and Guildford town centres, for example, are delivered, such developments could affect Kingston town centre's influence on shopping patterns in the survey area, particularly in the outer zones where competing centres have more influence. Accordingly we have tested the implications of these developments as a Scenario B.

8.113 Under Scenario B we have assumed that the Kingston core zone (1a-1e), will maintain its current market share derived from the 2013 household telephone survey. We have not factored in Kingston's ability to increase its market share as a result of the implementation of a major new development within Kingston town centre. As a sensitivity test we have made some adjustments to reduce Kingston town centre's market shares drawn from the outer zones to assess the impact of developments coming forward in the West End, Croydon, and Guildford, as well as smaller developments coming forward in Hounslow, Wimbledon and Westfield London.

8.114 Table 8.3 below identifies the adjustments made to the Kingston town centre market shares from across the study area. We consider that the reductions made to market share levels reflect the likely impact of the implementation of major competing schemes in the study area.

Table 8.3: Kingston Town Centre Current and Adjusted Market Shares Outer Zones

Telephone Survey Zone	2	3	4	5	6	7	8	9	10	11
Current Market Share (Scenario A) (%)	37.7	33.1	26.8	38.9	33.9	34.6	21%	24.8	54.7	54.4
Adjusted Market Share (Scenario B) (%)	35.8	29.8	24.1	36.9	30.5	26	18.9	18.6	52	51.7
% Reduction	5%	10%	10%	5%	10%	25%	10%	25%	5%	5%

8.115 Looking at existing market share patterns, the distribution of existing metropolitan centres, and the current catchments of these centres (Plan 4), we have made assumptions about levels of market share reductions across the survey area. The outer zones we consider to be most vulnerable to loss of market share are zones 7 (Leatherhead) and 9 (Sutton), as these are the centres closest to Guildford and Croydon respectively. Accordingly we have assumed that Kingston town centre could lose a quarter of current market share to zones 7 and 9.

8.116 We have assumed that zones 3 (Wimbledon), 4 (Hounslow), 6 (Epsom) and 8 (Wandsworth) are all likely to draw some market share from Kingston to competing schemes in the West End, Hounslow, Wimbledon and Westfield London, as well as to Guildford and Croydon. We have assumed that c.10% of the current Kingston town centre market share from these zones could support competing retail developments.

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- 8.117 We assume that zones 2 (Richmond), 5 (Sunbury), 10 (Walton on Thames) and 11 (Esher/Weybridge) will only be minimally affected as a result of future pipeline retail commitments. On this basis, we have assumed a 5% reduction of market share in these zones.
- 8.118 It is evident that even following the market share reductions under Scenario B, Kingston town centre still draws a market share of over 50% from zones 10 and 11. As such, we consider that the Borough zones (1a-1e), zone 10 and zone 11 form Kingston's core catchment area.
- 8.119 Appendix 3, Table 17 provides capacity forecasts for comparison goods on the basis of the adjusted Scenario B market shares. The adjustments indicate that if key pipeline developments in competing centres come forward over the plan period, and without any corresponding development in Kingston to improve its market share, this would reduce theoretical capacity to support new floorspace in Kingston town centre. Table 17 outlines that after deductions for improvements in floorspace efficiency (existing floorspace), committed retail developments, and claw back to competing centres, there will no available expenditure to support new comparison goods floorspace in 2018, however there will be £53.5m up to 2023, increasing to £286.7m up to 2028. Using an assumed sales density of £7,000 per sqm net, this equates to 6,265 sqm net comparison goods floorspace capacity up to 2023, increasing to 30,736 sqm net up to 2028.
- 8.120 On the basis of constant market shares (Scenario A) there is significant capacity arising for new comparison goods floorspace in Kingston (up to 54,444 sqm net up to 2028). On the basis of the adjusted market shares (Scenario B), retail need for new comparison goods floorspace in Kingston town centre is reduced (up to 30,736 sqm net arising up to 2028 (Appendix 3, Table 17), which reflects the aspirations of competing centres to improve/extend their comparison goods offer over the plan period. This is still a significant amount of retail need arising in Kingston town centre. However, this exercise ignores the prospect of a corresponding increase in Kingston's market share within its core catchment if a major new town centre scheme is delivered.
- 8.121 The scale of uplift achievable in Kingston's core catchment area, and the scope for attracting trade from beyond this area, will depend on the scale, form and market positioning of any new development which comes forward. Clearly a very large, high quality scheme attracting anchor stores and retailers not currently represented in Kingston (or neighbouring centres) would have the potential to 'claw back' much more trade than a scheme which largely replicates the current offer. However, in policy terms we consider a reasonable starting point would be to plan for Kingston to maintain its current overall market share. In Scenario B, this would mean that the impact on Kingston's market share within the outer parts of the catchment would be offset by corresponding increases in its market share within its core catchment.
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- 8.122 On this basis, we consider the baseline figures presented in Table 8.2 represent a robust policy position. While the impact of planned developments in neighbouring centres will have some bearing on Kingston's ability to materially increase its current market share, for the reasons outlined in Paragraphs 8.108 and 8.109, we consider that even in the face of increased completion, Kingston could support additional new floorspace over and above the figures identified in Table 8.2, and/or support development within a shorter timescale, provided new development is of sufficient scale/quality and is effectively integrated, and subject to consideration of the effects on other parts of the centre.

Surbiton Comparison Goods Capacity

- 8.123 On the basis of Surbiton maintaining its existing market shares from within the survey area, we estimate that there is some residual expenditure arising to support additional comparison goods floorspace towards the end of the plan period, by virtue of growth in population and expenditure.
- 8.124 In assessing capacity for comparison goods, two commitments have been factored in to the assessment (2 Ellerton Road and 39-42 Victoria Road), which comprise 515 sqm net additional comparison goods floorspace. The assessment at Appendix 3, Table 14 indicates that there is no capacity arising for comparison goods floorspace up to 2023, however between 2023 and 2028 capacity for 271 sqm net floorspace has been identified.

Tolworth Comparison Goods Capacity

- 8.125 On the basis of Tolworth maintaining its existing market shares from within the survey area, we estimate that there is residual expenditure to support some additional comparison goods floorspace up to 2028 on the basis of growth in population and expenditure.
- 8.126 In assessing capacity for comparison goods, we are not aware of any comparison goods commitments granted consent in Tolworth. Based on our assessment in Appendix 3, Table 15, there will be capacity for 49 sqm net additional convenience goods floorspace up to 2018, increasing to 128 sqm net up to 2023 and rising to 244 sqm net up to 2028. However, if a large foodstores with a non food retail offer is developed we are confident there is scope to support this based on an increase in market share.

New Malden Comparison Goods Capacity

- 8.127 On the basis of New Malden maintaining its existing market share from within the survey area, we estimate that there is residual expenditure arising in New Malden up to 2028 to support additional comparison goods floorspace, on the basis of forecast growth in population and expenditure.

8.128 In assessing capacity for comparison goods, we are not aware of any comparison goods commitments granted consent in New Malden. Based on our assessment in Appendix 3, Table 16, there will be capacity for 364 sqm net additional convenience goods floorspace up to 2018, increasing to 868 sqm net up to 2023 and rising to 1,592 sqm net up to 2028.

Summary

- It is evident from our analysis that the main foodstores in Kingston, Surbiton and New Malden town centres and the two edge/out of centre foodstores in Kingston are performing very strongly against benchmark levels. Asda London Road, Waitrose Surbiton and Waitrose New Malden all appear to be significantly overtrading.
- In contrast local convenience stores in Kingston, Surbiton and Tolworth appear to be performing less strongly, however the centres overall appear to be trading well. Local stores in New Malden are performing very strongly, reflecting the dominance of specialist Korean foodstores in the area.
- Out of centre foodstores outside the Borough are having a significant influence on market shares, particularly in the south and east of the Borough, thereby drawing trade away from the district centres of Tolworth and New Malden. These foodstores currently meet main food shopping needs not currently met in the south of the Borough.
- On the basis of current market shares and forecast growth in population and expenditure, we have identified global capacity to support additional convenience goods floorspace in the Borough over the plan period. In total, capacity has been identified for 9,739 sqm net up to 2018, increasing to 11,428 sqm net up to 2023 and to 13,394 sqm net up to 2028. The majority of the capacity arising is within Kingston and Surbiton as a result of the over performing foodstores in these centres. There is also convenience goods capacity arising within New Malden.
- In Tolworth, there is no capacity for additional convenience goods floorspace based on constant market shares. However, taking into consideration the lack of available sites in Surbiton, it may be most appropriate to redirect capacity from Surbiton to Tolworth to support more sustainable shopping patterns, and for Tolworth to claw more trade back from out of centre foodstores.
- Kingston town centre is clearly the most dominant comparison goods shopping destination in the survey area, attracting an overall market share of 34% from the survey area. Surbiton, Tolworth and New Malden perform more limited comparison goods functions, in keeping with the role and order of these district centres which are in close proximity to Kingston.
- Out of centre retail warehousing concentrated outside New Malden in the London Borough of Merton are also performing well, drawing strong market shares from within the Borough, influencing shopping patterns particularly for bulky DIY and homeware goods.

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- Based on the current market share of Kingston town centre (Scenario A), the district centres and out of centre retail warehouse provision, and after taking account existing commitments for additional comparison goods floorspace, our analysis identifies global baseline capacity to support significant levels of comparison goods floorspace over the plan period. The global capacity identified for the Borough is for 10,672 sqm net up to 2018, rising to 33,500 sqm net up to 2023, increasing to 65,977 sqm net up to 2028.
 - Within Kingston town centre, Scenario A tested that based on current market shares there is capacity in the town centre to support 9,038 sqm net up to 2018, increasing to 27,801 sqm net up to 2023, and up to 54,444 sqm net up to 2028. Scenario B has tested the effect of adjusted market shares for Kingston town centre being clawed back by pipeline large scale retail developments. This has the effect of reducing the available comparison goods expenditure being drawn to Kingston town centre, and a reduced capacity in Kingston town centre of up to 30,736 sqm net up to 2028. However, this scenario assumes that there is no corresponding development in Kingston town centre to increase its market share over the plan period.
 - For Policy purposes we consider the baseline comparison capacity forecast are robust, even taking into account the prospect of increased competition, given the strong current sales performance of the centre. In practice we anticipate that provided any new development is effectively integrated and of sufficient scale and quality to add to Kingston's current offer, the centre could support a more significant scale of new development, and/or new development within a shorter timescale than those indicated in our baseline forecasts.

9. Conclusions and Recommendations for Growth

- 9.1 This study provides a new up to date retail evidence base, focusing on retailing in Kingston town centre and Surbiton, Tolworth and New Malden district centres. The findings from the study will feed into the Council's emerging policy framework, specifically to update the Kingston Town Centre AAP. We have analysed the current performance of the main centres in the Borough and updated quantitative need assessments for convenience and comparison goods as a basis for forecasting future economic needs.
- 9.2 This section summarises our headline conclusions, our recommended retail strategy, and our policy recommendations.

Current Performance and Forecast Growth

Convenience Goods

- 9.3 Based on the results of our analysis, there is a reasonable level of convenience goods provision in the network of centres across the Borough, supplemented by two out of centre foodstores in Kingston.
- 9.4 Foodstores including Waitrose and Sainsbury's in Kingston town centre are found to be performing reasonably strongly, however the dominance of Kingston in terms of convenience goods market share arises as a result of the strength of the town edge/out of centre foodstores (Sainsbury's Sury Basin and Asda London Road) which are drawing high proportions of spend from the survey area. These foodstores are supplemented by a more local convenience goods offer including bakers, convenience stores and grocers.
- 9.5 The updated town centre audit identified little change in the performance of convenience goods retail in Surbiton, which remains very strong. The Waitrose is identified to be significantly overtrading, whilst the Sainsbury's store is also trading at above benchmark levels. Surbiton has a strong catchment area, which also draws trade from Tolworth and the south of the Borough.
- 9.6 The previous retail study identified that Tolworth had a strong convenience goods offer focused around Marks and Spencer, Budgens, Iceland, Tesco Express and local ethnic retailers. The most recent town centre audit of Tolworth has identified that the centre is not performing a strong convenience goods role and currently achieves a relatively low level of trade retention, with significant proportions of spend leaking to Surbiton town centre, and out of centre foodstores outside the Borough.

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- 9.7 In New Malden the previous retail studies identified a strong convenience goods offer, and the up to date town centre audit confirms that New Malden is still performing strong convenience goods offer. The Waitrose is performing very strongly, and the local stores (including ethnic Korean retailers) are also identified to be performing strongly.
- 9.8 On the basis of current market shares and forecast growth in population and expenditure, we have identified significant capacity to support additional convenience goods floorspace in the Borough up to 2028. This is largely as a result of little investment in foodstores since the previous studies were undertaken (the most significant investment has been Asda replacing Somerfield in the London Road supermarket), as well as the overtrading of existing stores in the Borough.
- 9.9 Capacity has been identified for 9,739 sqm net up to 2018, increasing to 11,428 sqm net up to 2023, rising to 13,394 sqm net up to 2028. Given the inherent uncertainties in forecasting over such a long period of time, longer term forecasts should be treated with caution and updated at regular intervals during the plan period. However, these estimates suggest scope for two full line superstores, and/or additional convenience goods stores in the Borough.

Recommended Strategy for Distribution of Convenience Goods Capacity

- 9.10 Additional convenience goods floorspace provision in the Borough over the plan period should seek to improve the quality of the retail offer in all centres. Significant convenience goods retail development should be directed to Kingston town centre first, where suitable and viable site opportunities arise. Future major new development within Kingston town centre should include an element of convenience goods floorspace as part of a wider mixed use scheme, to ensure that consumer choice is enhanced.
- 9.11 In order to enable a significant redevelopment of Kingston town centre, particularly at the allocated development sites (P1, P2 and P3), it may be necessary to consider new convenience goods provision in other edge of centre locations, in parallel with promoting satisfactorily designed, primarily comparison retail led and leisure opportunities in this area. Given the existing representation of 'mainstream' retailers, and the need to differentiate the offer of Kingston and the district centres, this should be supplemented by supporting independent retailers and farmers markets for example.
- 9.12 In addition, sustainable shopping patterns should be encouraged, particularly in Tolworth and towards the south of the Borough, to allow the claw back trade currently being lost to out of centre foodstores, including those outside the Borough. Whilst there is capacity to support more convenience goods floorspace in Surbiton (as a result of current overtrading), we have not identified any sites in Surbiton which would be able to accommodate a further large format convenience goods store in the area. Accordingly, it may be appropriate to redirect the capacity arising at Surbiton towards Tolworth.

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- 9.13 We note that an application is currently being considered by the Council for a supermarket on the edge of Tolworth town centre (c.4,700 sqm GIA). The development of a foodstore within the Tolworth area would seek to redistribute trade towards Tolworth and meet some of the identified convenience goods floorspace need. In order to achieve a redistribution of trade, the store would have to be of a large enough scale to support a full product range, enabling shoppers to undertake their main food shop. Provision of sufficient critical mass will enable the store to compete effectively with large out of centre foodstores, and claw trade back from these locations.
- 9.14 Should the Tolworth store be granted consent, we consider it may be premature for the Council to consider further edge or out of centre foodstore applications outside of Kingston town centre until the Tolworth store has been trading for at least 18 months and a new household telephone survey undertaken to understand the resultant changes in shopping patterns of the new store and its implications for the other District Centres. However, we recommend that options to explore options for the provision of an additional foodstore at New Malden (Cocks Crescent opportunity site) should be explored to meet the remaining identified convenience goods floorspace requirement. Given the limited opportunities for new retail sites within the District Centres, there should be a review of potential redevelopment opportunities within the District Centres if the Tesco proposal in Tolworth does not come forward.

Comparison Goods

- 9.15 Consistent with the findings of the previous study, Kingston town centre continues to be the dominant comparison shopping destination in the survey area, attracting a high market share (34%). This reflects the strength of the extensive comparison goods offer provided in the Metropolitan centre through the Bentall Centre, John Lewis and Eden Walk. Whilst the centre is considered to be performing well, the town centre audit has identified weaknesses within the comparison goods offer of the centre, including a lack of significant large scale investment in the town since the early 1990s and insufficient provision of retail units with large modern floorplates to meet retailer demand.
- 9.16 Taking these weaknesses into consideration, as well as the forthcoming pipeline developments in competing centres such as Guildford and Croydon, there is scope and a need for Kingston to significantly improve and enhance its comparison goods retail offer to ensure that the centre remains competitive, in parallel with improvements to its leisure and cultural attractions, and eating and drinking offer.
- 9.17 The role of comparison goods retailing in the district centres is unsurprisingly more limited, which reflects the size of these centres and the close proximity of the centre to Kingston. These centres provide a local comparison goods offer, which appears to be adequate in meeting local day

to day needs, with Kingston town centre serving wider comparison shopping needs. In line with wider trends, their role is likely to focus on convenience goods, services, restaurants and cafes.

- 9.18 Outside these centres, retail warehouse provision is particularly prevalent around New Malden. The results of the household telephone survey indicate that the concentration of retail warehouse units outside New Malden are key comparison goods attractors across the survey area, drawing a high level of market share.
- 9.19 Based on the strong constant market share of in and out of centre retail provision in the Borough (36%), and after taking into account committed developments for additional comparison goods floorspace, we have identified baseline global capacity to support 10,672 sqm net up to 2018, rising to 33,500 sqm net up to 2023, increasing to 65,977 sqm net up to 2028. This is a lower level of floorspace capacity than identified in the 2006 retail study, reflecting the more conservative expenditure growth rates used in this assessment. However, a significant amount of need for additional comparison goods floorspace is still identified in the town, which is a result of the lack of town centre investment since the previous retail study was undertaken. This is consistent with the strong retailer demand and qualitative deficiencies we have identified previously.

Recommended Strategy for Distribution of Comparison Goods Capacity

- 9.20 In accordance with Kingston town centre's position in the retail hierarchy we recommend that the majority of comparison goods floorspace capacity identified should be directed to Kingston town centre in the first instance. This should not preclude additional comparison goods floorspace coming forward in the district centres where opportunities arise, but in practice the opportunities in these centres are limited.
- 9.21 Using a gross/net ratio of 75%, the identified comparison goods capacity in the Borough is nearly 88,000 sqm gross (based on constant market share capacity for 65,977 sqm net). Therefore there is sufficient theoretical capacity to support a c.100,000 sqm gross mixed use town centre scheme in Kingston comprising additional convenience and food and drink provision. As such, it is clear that there remains enough retail need to accommodate significant comparison goods growth in the P1 (Clarence Street North), P2 (Eden Quarter – South of Clarence Street) and P3 (Eden Quarter – East of Eden Street) sites, as currently allocated in the Kingston Core Strategy Proposals Map (2012) and Kingston Town Centre AAP.
- 9.22 Factoring in the implications of potential significant retail developments coming forward in competing centres (Scenario B), results in a reduction in theoretical capacity arising in Kingston town centre. Although the outcome of this scenario test is a reduction in comparison goods capacity in Kingston town centre, there is still significant capacity arising within the town centre,

and this does not factor in the potential for Kingston to implement a town centre scheme which would result in an increase in Kingston's market share.

Recommended Strategy for Kingston Town Centre

Retail Offer and Retailer Demand

- 9.23 Whilst Kingston currently provides a dominant comparison goods shopping offer, the analysis in the town centre audit has identified two main deficiencies within the retail offer of Kingston town centre; suitable space to meet retailer requirements, and the gap in the high end retail offer.
- 9.24 There is a low vacancy rate in Kingston town centre, and those units which are vacant are of a small scale, and therefore are not of a suitable size and quality to meet modern retailer requirements. Over the last decade The Bentall Centre has used proactive management to facilitate the amalgamation of larger units where possible to allow retailers such as Apple to upsize. Demand has been identified from retailers in the mid and high end sectors (including international retailers and new retail entrants to the market), to open stores in Kingston town centre. However, at present there are very few opportunities using existing stock to provide large flagship retail units to meet their requirements.
- 9.25 Similarly to the previous retail study, we have identified significant comparison goods capacity for Kingston town centre, which will support the redevelopment and expansion of existing shopping facilities. We recommend that new retail development should provide larger floorplate units in order for new retailers to trade in Kingston town centre. New retail development in the centre could include the provision of a new department store (such as Debenhams, Selfridges or Harvey Nichols), and/or a mix of large anchor retail units and flagship stores, potentially including a new store for Marks and Spencer.
- 9.26 At present the offer is tailored to a mid market audience, whilst there is a gap in the provision of high end, luxury comparison goods retailers in the town centre. Shoppers currently have to travel out of the Borough to centres such as Westfield London (The Village), the West End, Guildford and Knightsbridge in order to make high end luxury purchases.
- 9.27 Analysis of retail trends indicates that the luxury and aspirational comparison goods retailers have remained resilient during the recession, and will remain a strongly performing sector going forwards. Evidence suggests that the Kingston catchment area is very affluent. In order to tap into the available expenditure that is not currently being drawn to Kingston for luxury goods, there is potential to broaden the comparison goods offer of Kingston town centre to target a higher end market. In addition, there may be scope to provide additional high end

convenience goods retailing in the town centre, through the provision of a store such as Wholefoods.

- 9.28 We are aware that The Bentall department store (Fenwicks) are proposing to provide a more upmarket and luxury retail offer through their concessions to target a higher end market. In addition to this we consider there is significant potential for additional high end retailing in Kingston town centre, by the development of a luxury/high end retail quarter.
- 9.29 There may also be potential to pursue options for more eclectic aspirational specialist retailing in Kingston town centre to accommodate retailers which are not usually found in traditional shopping malls (for example Covent Garden, St Christopher's Place and South Molton Street in central London). The provision of niche retailers in an open air, more contemporary setting would also help Kingston retain the historic character.
- 9.30 The historic core of Kingston and the riverside location are key strengths which differentiate Kingston from large purpose built shopping malls such as Westfield London and future development proposals at Croydon. By targeting a more aspirational, niche market Kingston would increase the competitiveness of the centre in relation to these competing centres, setting the retail offer of Kingston apart. Realigning the retail offer of Kingston to provide a unique, high end shopping experience will be important to help the centre compete with online channels.
- 9.31 Kingston's current strong comparison goods position should also be considered against the relative weaknesses and/or lack of recent retail investment in its main competing centres (Sutton, Croydon, Guildford, Wimbledon, Hounslow). While these centres continue to perform the same retail role, Kingston will continue to perform well. However, the current performance of Kingston provides no grounds for complacency. The analysis in Section 5 of this report identified significant town centre redevelopments planned in competing centres.
- 9.32 The redevelopment of the Whitgift and Centrale shopping centres in Croydon and the development of a new department store in Guildford will challenge the role of Kingston town centre, and curtail its catchment. Unless the Council pursues the significant redevelopment, expansion and investment of the town centre to keep pace with expenditure growth and retailer demand, Kingston will become increasingly vulnerable to loss of market share to competing centres and the internet.

Future Retail Planning Policy and Kingston Town Centre Development Sites

- 9.33 The NPPF directs that local planning authorities are required to allocate sufficient sites to meet identified retail needs in full. We recommend that Kingston town centre should be the primary focus to meet the identified capacity for additional comparison retail development up to 2028.

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- 9.34 We recommend that future retail policy relating to Kingston town centre needs to be prepared in order to ensure that the Council has an up to date development plan which allocates sufficient sites to meet identified retail needs. At present, the principles behind the Core Strategy and Kingston Town Centre AAP remain sound. However, in light of the findings of this study, there is a need to update the development plan in order to meet the most recently identified retail needs in full, and to set out positive principles to guide future development.
- 9.35 We recommended that a Local Plan is progressed as an update to the Core Strategy. The Kingston Core Strategy was based on previous retail projections, which are now considered to be out of date. At present the Core Strategy only provides generic town centre policies, and refers to the Kingston Town Centre AAP to be implemented. A clear, up to date policy position relating to meeting retail needs will ensure that unplanned out of centre retail development can be resisted.
- 9.36 In parallel with the production of a new Local Plan, we recommended the revision of the Kingston Town Centre AAP (2008), to assist in bringing forward future town centre development in a co-ordinated manner. The current AAP was based on previous retail projections, and several of the peripheral town centre allocation sites have since come forward for development. The revised AAP should provide a long term vision and approach to plan and deliver the scale of retail floorspace identified in this study.
- 9.37 The revised AAP should be underpinned by detailed analysis of the P1, P2 and P3 development sites to evaluate the physical capacity of these sites to accommodate levels of retail floorspace and take into account the potential future phasing of the P1, P2 and P3 town centre development sites. The revised AAP should provide clear guiding policy principles for future development, taking consideration of the deliverability and developability (including phasing) of the P1, P2 and P3 sites. This will provide a supportive, long term, co-ordinated strategy to facilitate the redevelopment of Kingston town centre.
- 9.38 Short term investment within the three town centre sites should not be discouraged as this will seek to address the short term retail needs identified. However, any future town centre applications should be required to demonstrate how the whole of the town centre redevelopment will be delivered (e.g. how the proposals fit in to an overall masterplan of the town centre).

Timescales for Major Town Centre Development

- 9.39 Theoretically, if a major town centre redevelopment scheme were to be prepared and a planning application granted over the next couple of years, it would be unlikely that construction works would begin on site until 2016/17, and that the town centre scheme would

be operational before 2018/2019. On this basis, we consider the Council should be actively promoting new development as a key priority.

- 9.40 If a major town centre scheme does come forward in Kingston town centre, either as a comprehensive scheme or a series of phases, we would expect that such a proposal would be likely to draw the majority of its trade from the Kingston core catchment area of zones 1a-1e, 10 and 11 (as identified in paragraph 8.116). We therefore consider it likely that any impact of the proposal on the market shares of competing centres will be marginal, particularly as the growth of competing centres should also come primarily from their own core catchments.

Eating, Drinking and Entertainment Facilities

- 9.41 Recent trends indicate that the traditional high street will have to adapt and evolve to provide a different retail and leisure offer to entice shoppers to visit town centres, in order to compete with online shopping and enhanced offers in competing centres. The findings of the town centre audit highlight deficiencies in the current leisure offer in Kingston, and providing an increased focus on improving the food, beverage and leisure offer will be key to the future health of Kingston town centre.
- 9.42 In Kingston town centre the main eating and drinking provision is focused around the Riverside and Rotunda character areas. The Riverside has been undergoing continued investment and improvement in recent years, particularly between Bishop's Hall and Town's End Wharf where there has been development of riverfront restaurants and bars (including Browns and Carluccios).
- 9.43 Construction is currently underway at the site next to Kingston Bridge for the redevelopment of Bishops Palace House, to include retail units facing Clarence Street and new restaurants facing the Riverside (application reference 10/12058, granted in May 2010). Six new restaurants are expected to open at the Bishops Palace House site by the end of 2013 as part of Phase 1 of the application, including Cote Brasserie. Phase 2 is expected to commence in 2019, which will include the provision of a further three restaurants, which will significantly enhance the dining attraction of the Riverside character area.
- 9.44 Notwithstanding this, at present the Riverside area remains separated from the retail core of the town centre due to poor accessibility and legibility through alleyways, which are not well signposted. The evening economy in the town centre is currently focused around nightclub provision, which predominantly serves the student population, which detracts from the perceived safety and quality of the area from potential visitors.
- 9.45 Results from the household telephone survey (2013) indicate that high quality family restaurants, particularly during the evening, are lacking in Kingston town centre. In addition to the

restaurant provision which is currently being expanded along the Riverside, we consider there is scope to further improve the restaurant provision to encourage trips to the centre during the evening and to enhance the family orientated evening economy which is currently underserved. This will enable Kingston town centre to compete more effectively with other successful family dining destinations such as the West End, Richmond and Wimbledon, which currently attract people who live in the Kingston survey zone.

- 9.46 In order to maximise the use of Kingston town centre for eating and drinking, the historic core (particularly around Market Place) has significant potential to provide an additional restaurant destination in the town centre, as part of a quality social and leisure hub, providing a mix of complementary retail leisure uses. The traditional Market Place is one of Kingston's unique selling points, and provides a historic setting which shopping centres such as Westfield cannot provide. Maximising the potential of Kingston town centre for leisure uses would increase footfall and vibrancy within the core of the town centre during the day and evening.
- 9.47 The recent trial of the night market at Market Place (organised by KingstonFirst) was considered to be successful, and indicates that there is a demand for retail and leisure activities in the town centre during the evenings. The focus of new restaurants and cafes around the Market Place, for example at the Market House, would also enhance the area during the daytime, providing the opportunity for outside dining. In addition, the gap in the high quality bar and club offer in Kingston town centre could be met within this area to cater to a different clientele than the existing student friendly bars and clubs in the Rotunda area. Addressing the gaps in the beverage sector through the provision of well managed bars which complement the family orientated dining facilities at the Market Place would seek to increase activity in this area during the evenings.
- 9.48 The Market Place has considerable potential to also host cultural events such as ice skating or open air theatre and cinema viewings. In addition to eating and drinking, there is potential to improve other entertainment facilities in the town centre, for example through the provision of an arthouse cinema (e.g. Everyman cinema) or enhanced use of existing facilities such as the Rose Theatre. A more upmarket leisure offer in Kingston town centre should reflect the market positioning of the future retail offer of the town. The provision of such facilities should be considered as part of the revised Kingston Town Centre AAP.

Public Realm and Place Making

- 9.49 At present Kingston has an attractive town centre environment including the historic core and high quality areas of public realm at the riverside, The Bentall Centre, Clarence Street and Old London Road. Other areas of the town centre provide a less attractive pedestrian environment, and the Council can play a key role in delivering public realm enhancements in these locations.

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- 9.50 Investment in the public realm should be pursued to provide an attractive and welcoming place to spend time. Town centres are under growing pressure to provide an enjoyable shopping and leisure experience in order to entice people to visit the town centre, rather than shopping on the internet or in purpose built shopping centres.
- 9.51 The Market Place is in the heart of Kingston town centre, making it an ideal location to be the focus of future town centre facilities and entertainment. Focusing the provision of a variety of new facilities and an enhanced leisure offer in this unique area would encourage the movement of people from existing key anchors (John Lewis, the Bentall Centre and Eden Walk), through the town centre. This would seek to increase footfall throughout the centre and encourage linked shopping and leisure trips.
- 9.52 The Market Place could be transformed into a 'central hub' area providing high quality facilities which shoppers increasingly expect to be provided by purpose built shopping centres. These could include areas to facilitate multi-channel retailing and click and collect, the provision of storage lockers, quality toilet facilities, free Wi-Fi and concierge/help desk. In addition, the provision of short term pick up and drop off facilities in the central hub area would seek to provide a convenient option to access the town centre. Making Kingston town centre more user-friendly will help provide a shopping experience that the internet is unable to provide, rivalling competing centres. The new central hub area providing key visitor facilities, alongside an enhanced eating and drinking role, would increase the vibrancy of the Market Place and revitalise Kingston town centre.
- 9.53 At present after around 6 or 7pm shops in the town centre close (with the exception of late night shopping at The Bentall Centre on Thursdays until 9pm), which has the result of impacting on the vibrancy of the centre during the evenings. Residents of the Borough who commute to London to work, are unlikely to be able to commute back into Kingston after work before the shops shut. If the town centre were to provide later opening hours this would increase the potential for increased shopping trips in the centre, and encourage people to use improved restaurants, bars and cafes during the evening.

Car Parking and Accessibility

- 9.54 One of the main perceptions about Kingston is that the centre is overly congested and difficult to park. Discussions with key stakeholders have highlighted that whilst some car parks are busy at peak times, others remain relatively quiet. A detailed audit of car parking occupancy should be undertaken to inform the revised AAP. A transport assessment will seek to ensure that key traffic gateways in to the centre are managed effectively.
- 9.55 As part of Kingston's future car parking strategy the Council should consider how to efficiently manage and maximise the capacity of existing car parks. For example, simplifying car park

pricing, signage and branding, and improving the quality of some car parks throughout the town centre as a whole this may improve the overall car parking experience for shoppers, and encourage them to visit the centre more often.

- 9.56 In terms of pedestrian accessibility, one of the key weaknesses of Kingston town centre is the lack of legibility between the key character areas in the town. The poor connectivity between different character areas currently reflects the rate of linked trips between different areas in the centre, with shoppers just traveling to the centre to visit John Lewis, for example, without spending time in the rest of the centre.
- 9.57 Opening up key routes through the centre, providing better signage, and focusing activity around a central hub will encourage movement through the centre, increasing footfall to support retail units. However, it will also be necessary to locate key 'anchors', which may be department stores, car parks, cultural/leisure facilities or 'oasis' restaurant quarters in order to encourage movement around the whole centre.
- 9.58 The proposed Crossrail 2 stop at Kingston will facilitate and encourage easy train access to Kingston. The additional level of passengers using the station provides significant potential to increase levels of footfall, and spend, in the town centre. Kingston train station and bus station will be key gateways into the town centre providing potential for investment in these areas. Harnessing the potential for additional visitors to the town centre by public transport will require investment and improvement of the shopping and leisure offer of the centre, as well as enhanced pedestrian routes, adequate signage and the provision of accessibility information.

Town Centre Management

- 9.59 In order to deliver effective town centre management, strong leadership will be required to co-ordinate the overall strategy for the town centre with the relevant key stakeholders in the centre. Kingston town centre it is more challenging to co-ordinate the overall running, leasing strategy and investment relating to a large retail area, in comparison to purpose built shopping centres such as Westfield or estates such as Marylebone High Street. Therefore consideration of the management of Kingston town centre will play a crucial role in the future development of the town.
- 9.60 We recommend that a town centre champion, such as the BID Futures group, should take a role co-ordinating the marketing and management of the town centre and related public realm improvements, working with key landowners to ensure a holistic and joined up approach to securing the long term vision for Kingston.

Recommended Strategy for District Centres

Surbiton

- 9.61 Surbiton should continue to serve the day to day needs of its local catchment and its growth and enhancement should continue to be supported by the Local Authority. We consider that there is limited need or opportunity for it to substantially improve its retail offer due to its proximity with Kingston-upon-Thames and limited development sites. We consider that Surbiton's growing role as a commuter town and its relatively affluent catchment area provide an opportunity to foster a vibrant café/restaurant/bar culture which will help to ensure that the centre is vital and active throughout the day and evening.
- 9.62 We also consider that there is particular merit in promoting public realm improvements to the junction of Brighton Road and Victoria Road to full integrate the railway station with the wider District Centre and better highlight this gateway entrance to Surbiton District Centre.

Tolworth

- 9.63 Tolworth currently suffers from high levels of traffic which bisect the centre and, as a result, poor pedestrian accessibility and high levels of pollution and noise. Planned public realm improvements will help to enhance the pedestrian experience in the centre. This may act as a catalyst for new development and may spur private investment in modernising and improving shop frontages along the centre.
- 9.64 The Toby Jug site represents a significant opportunity to enhance local retail provision in the centre and help to clawback expenditure currently leaking to out of centre destinations. The Council should ensure that new development here is successfully integrated so that the centre can benefit from linked trips and increased footfall. In particular, redevelopment should seek to improve connectivity between the railway station and the District Centre.

New Malden

- 9.65 New Malden is home to a range of Korean shops and services which serve local needs as well as those of a wider ethnic population which spreads across southwest London. These uses should continue to be supported so that the centre can continue to capitalise on its own unique attributes as a commercial and leisure destination.
- 9.66 The New Malden Town Centre Strategy should also be used to encourage public realm improvements to the centre. In particular, we consider that the area surrounding the railway station should be improved to enhance this gateway to New Malden and make better use of the high footfall generated in this area. Physical improvements should create enhanced visual

and physical linkages from the station to the northern end of the High Street St. George's Square and Waitrose.

- 9.67 Cook's Crescent represents an important development opportunity in the centre. Development here should help increase connectivity across the centre and could be a key site opportunity to improve retailing in the centre and clawback some expenditure which is currently being lost to the substantial out of centre facilities.

Policy Recommendations

- 9.68 In line with national policy, the Council should seek to focus town centre uses within Kingston town centre and the existing network of district centres. The Council should seek to retain a sequential approach to site selection, preferring locations in Kingston town centre in the first instance, and require out of centre retail developments to demonstrate that there would be no adverse impact on existing centres (current Core Strategy policy DM20).

Site Allocations

- 9.69 The Core Strategy does not currently specify a quantum of retail floorspace to be delivered in the Borough over the plan period. The Core Strategy refers to the Kingston Town Centre AAP as the mechanism through which the vision for Kingston town centre should be implemented. Relevant site allocations are identified in the Kingston Town Centre AAP.
- 9.70 The Council's retail strategy should seek to adopt a proactive approach in bringing forward the expansion and/or redevelopment of Kingston town centre, particularly at sites P1, P2 and P3 in the Kingston Town Centre AAP, which are currently allocated sites for retail development.
- 9.71 As discussed previously, the AAP is becoming dated and therefore updated retail planning policies relating to the redevelopment of Kingston town centre should be prepared to ensure that the proposed development sites can be implemented. The next revision of the Core Strategy should set out the future strategy for the delivery of the identified retail needs over the plan period, and an indication of where these needs should be met to ensure that the development strategy remains up to date.
- 9.72 It will be important for the Council to have planning policies in place which seek to allocate sufficient in and edge of centre sites to accommodate retail needs in full. As such, the Council should undertake a robust assessment regarding the capacity of site allocations to ensure that retail needs can be met over the long term, and to establish the mechanisms to ensure they can be available over the plan period.

Retail Impact Thresholds

- 9.73 Given the strength of Kingston town centre, we do not consider there sufficient justification to support a blanket locally-set threshold different to that set out within the NPPF (i.e. 2,500 sqm gross). However, recognising the role of the district centres, which are reliant on smaller catchment areas to support their retail function, there may be justification to adopt a lower retail impact assessment threshold. Based on the relative sizes of the main foodstore anchors in the district centres, we consider that an impact threshold of c.1,000 sqm (net) would be appropriate for new retail floorspace proposals that are not in an existing centre and not in accordance with an up-to-date development plan.
- 9.74 In order to maintain a degree of control over out of centre retail development, the Council could adopt a policy which acknowledges that, in normal circumstances, retail development below the NPPF threshold would not normally require an impact assessment but that, subject to the Council's discretion, an assessment may be required in certain circumstances, particularly where there may be concerns over i) cumulative impact; and/or ii) the role/health of nearby centres within the catchment of the proposal. Applicants should be encouraged to engage with the Council at an early stage to establish whether an impact assessment may be required.

Kingston Town Centre Retail Frontages

- 9.75 The NPPF requires that a Primary Shopping Area (PSA) is defined in town centres, upon which the basis of in and out of centre retail locations can be determined. In addition, planning policies should also define primary and secondary retail frontages, with clear definitions of which uses will be permitted in such locations.
- 9.76 The P3 primary shopping area extension does not fall within the currently defined PSA. The quantitative assessment highlights a continued retail need to support expanding the Primary Shopping Area (PSA) proposed in Kingston. We recommend that the P3 site should be allocated in the proposals map as a 'planned extension to the PSA', and we endorse the expansion of the PSA to protect the town centre from out of centre retail development. The Council should also consider updating the primary and secondary retail frontages in Kingston town centre, regarding the proposed extension to the PSA.
- 9.77 In relation to shopping frontages, the Kingston Town Centre AAP Policy K2 directs that the Council will not permit change of use of Class A1 retail units in primary shopping frontages to other uses. Within secondary shopping frontages proposals for change of use from A1 to A2 or A3 use are permitted, provided that the proposal would not result in an overconcentration of non-retail uses. In 'other' frontages (which comprise retail units on Richmond Road), the change of use of retail to A4, A5, D1 and D2 uses will be considered on their merits.

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- 9.78 In light of relevant Government research, retail trends, and the new permitted development right to permit change of use between retail and leisure uses (in units under 150 sqm), it is evident that the stringent policy frontage controls set out in the Kingston Town Centre AAP Policy K2 conflict with the trend towards providing a greater variety of town centre uses in town centre locations.
- 9.79 Accordingly, the Council may wish to consider more flexibility in relation to change of use within secondary retail areas, for example permitting change of use of A1 units to A2, A3, A4, A5, B1, D1 and D2 uses, where this would not result in an overconcentration of non-retail uses. This would provide a pro-active approach to enabling vacant retail units to become occupied, thereby maintaining a vibrant high street.
- 9.80 In order to deliver the central hub area around the historic core around Market Place, planning policies should be more flexible to permit mix of units and to respond appropriately to different circumstances and opportunities as they arise. If the Council were to pursue the development of the Market Place as a retail and leisure hub providing good quality family restaurants and cultural attractions, as well as visitor facilities, it would be relevant for the Council to consider designating the area as an 'oasis area'. Westminster City Council have a similar designation in place which facilitates the provision of eating, drinking and leisure uses in 'oasis areas' to support the more intense retail shopping areas in the primary shopping frontages (for example oasis areas include St Christopher's Place, Argyll Street and Glasshouse Street). Providing more flexibility between the A1, A2, A3 and A4 use classes in the area around Market Square may add to the area's vibrancy, and seek to provide a more leisure and service orientated function in this area.
- 9.81 The rest of Kingston's primary frontage designation at John Lewis, the Bentall Centre, Eden Walk and Clarence Street appear reasonable, and the secondary frontage designations through the rest of the centre also appear to be reasonable.

District Centres Retail Frontages

- 9.82 In the district centres, Core Strategy Policy DM19 states that the shopping frontages in the district centres should be retained for predominantly retail use, so that they continue to provide locally accessible goods and services and that applications for change of use which would threaten the predominance of A1 uses will be resisted. We consider that this requirement remains acceptable to control town centre uses in the district centres.
- 9.83 At present the Core Strategy Proposals map designates 'shopping frontages' in district centres. The extent of the shopping frontage appears reasonable in all of the district centres. However we would recommend that in the next update that the shopping frontage be renamed as the Primary Shopping Area to ensure consistency with the NPPF. Due to the size of the district

centres, we do not consider it appropriate to define primary and secondary shopping frontages in these locations.



Report

Appendices



Report

Appendix 1
Kingston
Development
Sites

APPENDIX 1 – KINGSTON DEVELOPMENT SITES

Table 1 – Kingston K+20 Area Action Plan Development Sites

Site Ref.	Location	Policy Proposal (Kingston AAP)	Related Policy	Existing Use	Status
P1	Clarence Street North (1.02 ha) (in-centre)	<p>Comprehensive upgrading and intensification of this area to provide:</p> <ul style="list-style-type: none"> High quality comparison retail facilities with residential, including affordable housing, replacement offices, studio workshops or community facilities above New pedestrian routes from Clarence Street to Fife Road Secure cycle parking Car free development 	<p>Policy K1, K2, K4, K6, K7, K9, K15, K18, K24</p> <p>Policy CS5, CS6, CS7, CS10, CS12</p>	Retail	<p>Phasing 2021/2022</p> <p>Site remains undeveloped</p>
P2	Eden Quarter - South of Clarence Street (2.25 ha) (in-centre)	<p>Mixed use development, including:</p> <ul style="list-style-type: none"> High quality new comparison shopping facilities in an open street format with a mix of shop sizes, to the rear of Clarence Street frontage, including the partial redevelopment of the Eden Walk shopping centre Residential, including affordable housing, offices and community uses, above the retail Landmark building towards the eastern side of the site Improved pedestrian links between Clarence Street and union street and Eden Walk and memorial 	<p>Policy K1, K2, K4, K6, K7, K9, K10, K15, K17, K18, K19, K20, K24, L1</p> <p>Policy CS5, CS6, CS7, CS10, CS12</p>	Retail	<p>Phasing 2019/2020</p> <p>Planning permission granted for various retail upgrade and refurbishment schemes including the redevelopment of 38 Clarence Street (10/12274 – River Island); Phase 1 upgrade of Eden Walk Shopping Centre (completed 2011); Phase 2</p>

		<p>gardens</p> <ul style="list-style-type: none"> Retention and enhancement of the shop mobility scheme; Enhanced basement servicing in line with policy k15 Secure cycle parking Good quality links to public transport and public car parks outside p2 Removal of the Eden Walk multi-storey car park 			<p>upgrade of Eden Walk (including a medium sized unit – 11/12278)</p> <p>Minor works complete, larger site remains undeveloped</p>
P3a	Eden Quarter - East of Eden Street and Ashdown Road	<p>Mixed use development including:</p> <ul style="list-style-type: none"> Extension of the Primary Shopping Area onto the Ashdown Road site (p3a) by the provision of high quality new comparison shopping facilities in an open street format, with a mix of shop sizes Residential including affordable housing and offices above retail Community use New public space (p3a) Basement servicing with access from Wheatfield Way; New bus station (p3a) on the Wheatfield Way frontage with high quality waiting facilities for bus passengers Multi storey car park (p3a) access from Wheatfield Way; 	<p>Policy K1, K2, K4, K5, K6, K7, K10, K15, K16, K18, K20, K24</p> <p>Policy CS5, CS6, CS7, CS12</p>	<p>Multi-storey car park</p> <p>Surface car park</p> <p>Retail</p> <p>Hotel</p> <p>Sui Generis</p>	<p>Phasing 2020/2021</p> <p>Application 11/12906 to provide a significant extension to the Primark store withdrawn.</p> <p>Application 11/12749/PRE to redevelop the site with 32 dwellings above.</p> <p>Site remains undeveloped</p>
P3b	(3.6ha) (in/edge-of centre)				

P3C		<ul style="list-style-type: none"> Secure public cycle parking centre Refurbishment and re-use of the listed former post office building to include community use Redevelopment and intensification (P.3b) provide high quality buildings, new retail facilities, with residential, offices, a hotel or community uses above Improved pedestrian links from Wheatfield Way to Eden Street Redevelopment of area p3c, fronting Clarence Street to improve the quality to provide a focal point in this gateway location Public art 			
P4	St. James Area (0.8ha) (in/edge-of centre)	<p>Redevelopment and refurbishment to improve its appearance and uses and provide;</p> <ul style="list-style-type: none"> Enhanced retail, better quality offices, entertainment and leisure facilities, community facilities, residential, including affordable and student housing Appropriately located if the nightclub remains Enhanced public space which relates better to the listed union church and enhances its setting Public car parking Public art 	<p>Policy K1, K2, K4, K6, K7, K9, K10, K20, K24</p> <p>Policy CS5, CS6,, CS7, CS10, CS11, CS12, CS16</p>	<p>Multi-storey car park</p> <p>Retail</p> <p>Sui Generis Office</p>	<p>Phasing 2020/2021</p> <p>Under Construction</p>
P5	Cattle Market Car Park and Fairfield Bus Station	<p>The provision of;</p> <ul style="list-style-type: none"> Improvements to the Fairfield bus station 	<p>Policy K3, K7, K10, K16, K17, K20, K24</p>	<p>Bus Terminal</p> <p>Surface car park</p>	<p>Phasing 2019/2020</p>

	(0.65ha) (edge of centre)	<ul style="list-style-type: none"> Improved car parking Improved pedestrian links across Wheatfield Way to Adams Walk Improved facilities for the Monday Market Affordable Housing 	Policy CS5, CS6, CS7, CS12		Site remains undeveloped
P6	Kingfisher Leisure Centre, Kingston Library and Museum and Open Space (1.35ha) (edge of centre)	<p>Improvements to the quality of facilities and environment, including:</p> <ul style="list-style-type: none"> Upgrading or replacement of the Kingfish Leisure Centre for leisure, recreation or community use Retention and enhancement of the local open space and an improved play area Enhancing Kingston Library, Museum and Art gallery and the setting of the listed buildings by the demolition of the Children's Library Building Residential including affordable housing 	Policy K6, K7, K10, K24 Policy CS5, CS6, CS7, CS10, CS16.	Kingston Library Kingston Museum Art Gallery Kingfisher Leisure Centre Open Space	Phasing 2018/2019 Site remains undeveloped
P7	Former Fairfield Nursery Site (edge of centre)	Redevelopment of this site for education or community use, retaining the open space and the mature trees.	Policy K24	Unknown	Application 12/12313 for redevelopment to provide a new Quaker Meeting House and community use. Site remains undeveloped

P8a	107 - 163 Clarence Street, Rear Yard, Former Empire Building and Station Buildings, Fife Road (0.59ha) (in centre)	<p>Mixed use development including:</p> <ul style="list-style-type: none"> Retention and enhancement of the former Empire Theatre building for retail floor or A3/A4 uses on the ground floor and with A3/A4 and D2 leisure uses above Retail and retail related uses, either side of the former Empire Theatre Building, with B1 offices above Redevelopment of the Station buildings for retail and retail related uses with b1 offices or residential above Redevelopment of the rear service yard and parking area, to include servicing, parking, and managed student housing with pedestrian access from Clarence Street and Fife Road and vehicle access from Fife Road. 	<p>Policy K1, K2, K4, K6, K7, K24</p> <p>Policy CS5, CS6, CS7, CS10, CS11, CS12, CS15, CS16</p>	<p>Retail</p> <p>Student Accommodation</p> <p>Offices</p>	<p>Phasing 2012/2013</p> <p>Application 11/12251 for change of use of upper floors from b1 to C3 (64 bedrooms).</p> <p>Site remains undeveloped</p>
P8b					
P9	North West Corner of Fife Road and Wood Street (edge of centre)	<p>Comprehensive development for retail and related uses with residential or B1 offices/studio workspace above.</p>	<p>Policy K24</p>	<p>Retail</p>	<p>Site remains undeveloped</p>
P10	Kingston Station (0.69ha) (edge of centre)	<p>Long term potential for mixed use development to provide:</p> <ul style="list-style-type: none"> New train station Retail uses at ground level B1 offices/workspace above general and/or managed student housing to create a high quality landmark development Improved public realm 	<p>Policy K24</p> <p>Policy CS6</p>	<p>Railway Station</p> <p>Retail</p>	<p>Phasing 2013/2014</p> <p>Application 11/12403/PRE for extension to length of platform.</p> <p>Site remains undeveloped</p>

P11	Quebec House (edge of centre)	<ul style="list-style-type: none"> Better pedestrian/cycle links across the relief road Secure cycle parking facility. <p>Mixed use development to include:</p> <ul style="list-style-type: none"> Ground Floor A1 retail, A2 financial and professional service, A3 restaurant/café uses with active frontages Use of upper floors for offices, residential (including affordable housing and managed student accommodation) or D1 uses, including a non residential education or training centre Improvements to the pedestrian environment and link between the railway station and the Cromwell Road bus station. 	Policy K24	N/A	Complete
P12	Northern Riverfront - Bentalls Car Park, Vicarage Road and Turks Sites (1.87 ha) (edge of centre)	<p>Mixed use development, excluding Bentalls A car park to include:</p> <ul style="list-style-type: none"> Full service hotel with conference and banqueting facilities Residential including affordable housing Ground floor A1, A3, A4 uses with active frontages New public space on the riverside High quality pedestrian route from Wood Street to the riverside and public car parking High quality public realm and frontages to the riverside, which is part of the Thames Path National Trail Environmental enhancements to the relief road 	Policy K6, K7, K9, K10, K13, K17, K20, K24 Policy CS3, CS5, CS6, CS7, CS8, CS10, CS11, CS11	Retail Residential Leisure Multi-storey car park	Phasing 2016/2017 Application 07/12536 under construction for the redevelopment of Turks land site for 58 flats above ground floor retail use. Under Construction

P13	Bishops Palace House and 11 - 31 Thames Street (in-centre)	<ul style="list-style-type: none"> Mooring facilities, including retention of the Turks landing stage for river boat passenger services and enhancements to those services Ecological enhancements along the riverside, especially at Horsefair Quay 			
		<p>Redevelopment to provide:</p> <ul style="list-style-type: none"> A1 comparison retail Housing, including affordable housing B1 offices A3 café/restaurant uses and replacement A4 public house Secure public cycle parking centre Improved access to the riverside High quality public realm improvements to the riverside walk either by direct provision or through a s. 106 financial contribution Development proposals will need to safeguard key views. 	Policy K1, K4, K7, K9, K10, K11, K13, K18, K23, K24	Retail Car park Residential	<p>Planning permission (10/12058) granted for part redevelopment/part refurbishment to provide new restaurants and terraces overlooking the river.</p> <p>Site remains undeveloped</p>
P14	Guildhall 1, County Court and Bath Passage/St. James Road Corner (in/edge of centre)	<p>The Council will work with Her Majesty's Courts Service to provide new and upgraded Courts and associated support facilities, including:</p> <ul style="list-style-type: none"> Development of the yard area alongside Bath Passage Comprehensive redevelopment of P14 for retail, A3, offices, courts, civic and community uses. 	Policy K4, K5, K6	Guildhall	Site remains undeveloped

P15	Surrey County Hall (out-of centre)	In the event of Surrey County Council moving out of County Hall, the Council will promote the use of the building for higher education use by Kingston University. Vehicle access should be from Penryhn Road and the Bittons. The building is Grade II Listed.	Policy K24	Surrey County Council	No Update Surrey County Council no longer moving location – site no longer available. Site remains undeveloped
P16	Kingston University (out of centre)	The Council wish to secure; <ul style="list-style-type: none"> • High quality redevelopment of outmoded buildings to accommodate University expansion and enhance its facilities, including landmark development of the Town House on the Penryhn Road frontage • Landscaping and environmental improvements along the Penryhn Road approach to the town centre • Secure cycle parking provision • Improved pedestrian routes across the site Development should safeguard the amenity of adjoining residential areas and the setting of the Grove Crescent Conservation Area.	Policy K24		Application 12/12239 for provision of waste/recycling compound adjacent to Fasset Road. Site remains undeveloped
P17a	Former Power Station and Electricity Sub Station, Skerne Road, Thames Water Pumping	Comprehensive redevelopment and upgrading of site will involve; <ul style="list-style-type: none"> • housing on 17a and 17b, including affordable housing; • a quality full service hotel with conference and 		N/A	Application 05/12214 for erection of A3 use on Barge Dock Site. Amendment to application 06/12424 for hotel use (150 bed) and residential dwellings (347

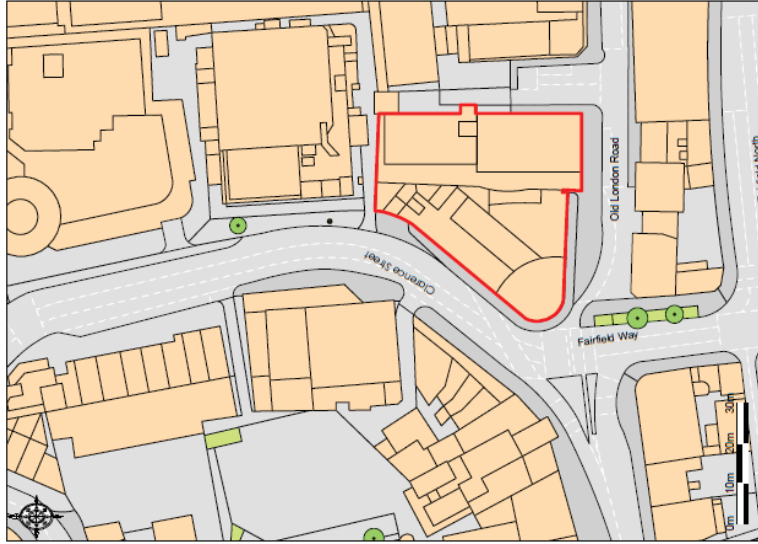
P17b	Station and the Barge Dock, Down Hall Road (edge of centre)	<p>banqueting facilities on 17a and 17b;</p> <ul style="list-style-type: none"> a community use such as a nursery; landscaped amenity and play space on 17a and 17b; main vehicle access to 17a and 17b from Henry Macaulay Ave via Sury Basin, some limited access may be allowed from Skerne Road and Down Hall Road; a pedestrian route from Down Hall Road to Henry Macaulay Avenue to improve permeability and pedestrian access across 17a; basement car parking on 17a for the housing and hotel; secure cycle parking; active frontages to 17b; on site recycling; improvements to the Barge Dock 17c, including the moorings and storage facilities, visual appearance and boundary treatment; improvements to the appearance of the TW Pumping Station 17d; and provision of public art 			units).	Under Construction	
P17c							
P17d							
P18	Lok 'n Store Site, 12 Skerne Road (edge of centre)	<p>Private sector landowner to provide;</p> <ul style="list-style-type: none"> Housing including affordable housing NHS GP healthcare facility 	Policy K7, K24	N/A		Redevelopment for 124 flats and GP surgery (04/12170) – Completed December 2011.	


			<ul style="list-style-type: none"> • Landscaped amenity and play space • Basement car parking • Secure cycle parking • On site recycling facility 			Complete	
P19a			<p>The Council will work with Kingston College to secure:</p> <ul style="list-style-type: none"> • New and upgraded facilities for Kingston College on their Richmond Road site (19a), retaining the old school frontage building and the Penny Gallery • Redevelopment of the site to the north of the College (19e) for mixed retail uses with residential above or education use • Upgrading of the appearance of the property to the south of the College (19b) or its redevelopment for education, retail or office use • Retention of the Kingsgate Business Centre and printing works (19c) for employment use of their redevelopment for B1 business use or ground floor B1 use with managed student accommodation above. <p>In the event that the gas holders (19d) are decommissioned and become available for redevelopment, mixed use redevelopment will be sought to provide retail, office, community uses, education uses, housing and open space.</p>				
P19b	Kingston College and adjoining sites, Richmond Road, the Gas Holder Site and Kingsgate Business Centre and Printing Works, Kingsgate Road						
P19c							
P19d	(1.99)						
P19e	(edge of centre)						

P20	Kingsgate Car Park and Richmond Road Frontage: (0.55ha) (edge of centre)	<p>Mixed use development of the Kingsgate car park and the Richmond Road frontage to provide;</p> <ul style="list-style-type: none"> • Ground floor retail and retail related uses on the Richmond road frontage • Retail or showroom uses on the ground floor on the car park site • Residential, including affordable and student housing, offices, or community uses on the upper floors • Education uses • Vehicular access from Kingsgate Road; • Car parking • Improvements to traffic circulation 	<p>Policy K24</p> <p>Policy CS5, CS7, CS10, CS11</p>	<p>Retail</p> <p>Car Park</p>	<p>Phasing 2018/2019</p> <p>Site remains undeveloped</p>
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Source: Royal Borough of Kingston AMR 2012; K+20 Kingston Area Action Plan.

Table 2 - Additional Sites Identified by GVA

Site		Current Use	Site Potential
<p>Land to the western edge of the London Road character area. Site bound by Oceana Nightclub (north), Clarence retail units (east), Old London Road (south) and Clarence Street (west)</p> <p>Site Area: 0.2 ha</p>		<p>The land is currently occupied by commercial units, including Wilkinson and Travel Lodge. Wilkinson currently occupies a dated retail unit which provides a poor retail frontage to the Clarence Street / Fairfield West junction. The Wilkinson unit is considered to be suitable for investment and improvement.</p> <p>Site is located within the secondary retail frontage and the majority of the site falls within the PSA, and therefore is considered to be 'in centre' for the purpose of the sequential test.</p>	<p>Site has potential for enhanced retail and/or leisure offer.</p>

<p>Land north of train station on Richmond Road. Site bound by Cowlease Road (north), office units (east), Cadbury Park Road (south) and Richmond Road (west).</p> <p>Site Area: 0.15 ha</p>		<p>This underutilised vacant unit comprises 1,680 sqm floorspace and is located on the edge of the Primary Shopping Area (and therefore is classified as edge of centre. The site is currently designated 'other shopping frontage',</p>	<p>Enhanced retail and/or leisure offer.</p>
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Source: GVA, June 2013



Report

Appendix 2
Convenience
Goods
Modelling

Royal Borough of Kingston upon Thames Town Centre Study 2013 Convenience Goods Modelling

Table 1
Survey Area Population Forecasts

	Royal Borough of Kingston upon Thames					Outside Royal Borough of Kingston upon Thames											Total
	Zone 1a	Zone 1b	Zone 1c	Zone 1d	Zone 1e	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11		
2013	43,900	30,700	19,500	48,900	19,100	87,609	109,819	255,638	63,262	90,889	51,856	300,955	190,442	89,395	71,444	1,473,409	
2018	45,800	31,300	20,600	49,800	19,500	93,269	120,796	275,994	65,595	95,641	52,865	321,118	204,487	93,639	74,755	1,565,158	
2023	47,200	31,900	21,500	50,700	19,700	97,876	129,378	293,017	67,904	100,368	54,283	336,158	217,717	97,850	78,182	1,643,733	
2028	48,700	32,500	21,900	51,800	20,200	101,712	135,803	307,083	70,165	104,737	55,665	348,095	229,463	101,637	81,224	1,710,684	

Source: Royal Borough of Kingston upon Thames Population Projections and Experian Micromarketer (ONS Revised Population Figures, Census 2011), April 2013

Wards and Postal Sectors by Zone	
Zone 1a	KINGSTON - Wards of Canbury, Grove, Norbiton and Tudor
Zone 1b	SURBITON - Wards of Berrylands, Surbiton Hill and St Marks
Zone 1c	TOLLWORTH - Wards of Alexandra and Tolworth and Hook Rise
Zone 1d	NEW MALDEN - Wards of Beverley, Coombe Hill, Coombe Vale, Old Malden and St James
Zone 1e	SOUTH OF THE BOROUGH - Wards of Chessington South and Chessington North and Hook
Zone 2	SW14 7/8, TW1 1/2/3/4, TW 9 1/2/3/4, TW10 5/6/7
Zone 3	SW19 1/2/3/4/5/6/7/8, SW20 0/8/9, part KT3 4/6
Zone 4	TW2 5/6/7, TW3 1/2/3/4, TW4 5/6/7, TW5 0/9, TW 7 4/5/6/7, TW8 0/8/9, TW13 4/5/6/7, TW14 0/8/9
Zone 5	TW15 1/2/3, TW16 5/6/7, TW17 0/8/9
Zone 6	KT17 1/2/3/4, KT18 5/6/7, KT19 0/7/8/9, KT21 1/2
Zone 7	KT11 1/2/3, KT22 0/7/8/9, KT23 3/4
Zone 8	SW11 6, SW12 8/9, SW13 0/8/9, SW15 1/2/3/4/5/6, SW17 0/7/8/9, SW18 1/2/3/4/5, W3 8, W4 1/2/3/4/5
Zone 9	KT4 7/8, SM1 1/2/3/4, SM2 5/6/7, SM3 8/9, SM4 4/5/6, SM5 1/2/3
Zone 10	KT1 4, KT8 0/1/2/9, KT12 2/3, TW1 1 0/8/9, TW12 1/2/3
Zone 11	KT7 0, KT10 0/8/9, KT12 1/4/5, KT13 0/8/9, part KT9 1, part KT6 5

Royal Borough of Kingston upon Thames Town Centre Study 2013

Convenience Goods Expenditure Forecasts

Table 2
Per Capita Convenience Goods Expenditure (2011 Prices)

	Zone 1a	Zone 1b	Zone 1c	Zone 1d	Zone 1e	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Growth in convenience goods spending per capita:															
2011 - 2012	0.1% pa														
2012 - 2013	-0.1% pa														
2013 - 2018	0.5% pa														
2018 - 2023	0.8% pa														
2023 - 2028	0.8% pa														
2011	1,944	1,944	1,944	1,944	1,944	2,311	2,240	1,774	2,071	2,061	2,152	2,273	1,999	2,113	2,238
2013	1,944	1,944	1,944	1,944	1,944	2,311	2,240	1,774	2,071	2,061	2,152	2,273	1,999	2,113	2,238
2013 Minus SFT at 3%	1,886	1,886	1,886	1,886	1,886	2,242	2,173	1,721	2,009	1,999	2,087	2,205	1,939	2,050	2,171
2018	1,993	1,993	1,993	1,993	1,993	2,369	2,297	1,819	2,123	2,113	2,206	2,330	2,049	2,166	2,295
2018 Minus SFT at 4%	1,913	1,913	1,913	1,913	1,913	2,275	2,205	1,746	2,038	2,029	2,118	2,237	1,967	2,080	2,203
2023	2,074	2,074	2,074	2,074	2,074	2,466	2,390	1,893	2,210	2,199	2,296	2,425	2,133	2,254	2,388
2023 Minus SFT at 5%	1,970	1,970	1,970	1,970	1,970	2,342	2,270	1,798	2,099	2,089	2,181	2,304	2,026	2,142	2,268
2028	2,158	2,158	2,158	2,158	2,158	2,566	2,487	1,970	2,299	2,288	2,389	2,524	2,219	2,346	2,485
2028 Minus SFT at 5%	2,050	2,050	2,050	2,050	2,050	2,438	2,363	1,871	2,184	2,174	2,270	2,397	2,108	2,229	2,361

Source: Experian Micromarketer, March 2013

Table 3
Total Survey Area Convenience Goods Expenditure (2011 Prices)

	Zone 1a	Zone 1b	Zone 1c	Zone 1d	Zone 1e	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
2013	82,781	57,890	36,771	92,210	36,016	196,390	238,614	439,896	127,085	181,702	108,246	663,548	369,272	183,225	155,095	2,968,743
2018	87,632	59,888	39,415	95,285	37,311	212,148	266,318	481,897	133,706	194,010	111,973	718,398	402,327	194,741	164,665	3,199,713
2023	93,002	62,855	42,363	99,899	38,817	229,262	293,741	526,869	142,538	209,667	118,403	774,460	441,125	209,564	177,347	3,459,912
2028	99,858	66,641	44,905	106,215	41,420	247,931	320,860	574,603	153,271	227,686	126,352	834,557	483,820	226,522	191,736	3,746,378

Source: Tables 1 and 2

Royal Borough of Kingston upon Thames
Town Centre Study 2013
2013 Convenience Baseline Position - No New Development

Table 4
Convenience Goods Allocation 2013 - % Market Share

Centre	Royal Borough of Kingston upon Thames				Outside Royal Borough of Kingston upon Thames				Zone 11					
	Zone 1a Kingston	Zone 1b Sutton	Toworth	South of New Malden Borough	Zone 2 Richmond	Zone 3 Wimbledon	Zone 4 Horslow	Zone 5 Sutton	Zone 6 Epsom	Zone 7 Leatherhead	Zone 8 Wandsworth	Zone 9 Sutton	Zone 10 Woburn Thames	Zone 11 Ease / Weybridge
KINGSTON CENTRE														
Stratford, Epsom Way, Kingston	5.4%	11%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wickham Wood Street, Kingston	7.6%	0.4%	0.5%	1.0%	0.8%	3.4%	2.0%	0.4%	0.0%	0.0%	0.5%	0.7%	7.1%	0.0%
Mids and Spence, Cranborne Street, Kingston	1.9%	0.0%	0.8%	0.4%	0.2%	0.3%	0.0%	0.4%	0.0%	0.0%	0.4%	1.9%	0.0%	0.0%
Chapel Road, Stone, Kingston Town Centre	4.4%	0.3%	0.3%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
TOTAL KINGSTON CENTRE	19.3%	2.7%	1.6%	3.4%	1.0%	4.1%	3.4%	0.8%	1.0%	0.0%	2.4%	2.6%	8.3%	0.2%
KINGSTON OUT OF CENTRE														
Stratford, Epsom Way, Kingston (EDGE OF CENTRE)	38.8%	0.0%	3.2%	1.6%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%
Apsle London Road, Kingston (OUT OF CENTRE)	18.1%	4.2%	4.2%	8.4%	1.7%	1.3%	2.0%	0.0%	0.0%	0.7%	0.0%	1.2%	0.4%	2.4%
TOTAL KINGSTON OUT OF CENTRE	56.9%	4.2%	7.4%	10.0%	1.7%	6.1%	2.0%	0.0%	0.7%	0.0%	1.2%	0.4%	1.7%	2.4%
TOTAL KINGSTON	76.2%	6.9%	9.0%	13.4%	2.7%	10.1%	2.7%	3.4%	0.8%	1.7%	0.8%	3.7%	10.0%	2.7%
WANDSWORTH SUBSTON														
Wandsworth, Sutton	5.4%	37.3%	12.4%	0.0%	7.7%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	13.0%
Stratford, Sutton	0.3%	26.9%	6.8%	0.0%	5.6%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	6.1%
Chapel Road, Stone, Wandsworth	0.2%	8.6%	2.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
TOTAL SUBSTON IN CENTRE	6.3%	72.9%	21.3%	0.0%	13.8%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	19.9%
TOWN CENTRE														
Mids and Spence, Toworth	0.0%	1.4%	16.7%	2.3%	2.9%	0.0%	0.4%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%
Island, Toworth	0.0%	2.7%	5.3%	0.4%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Budget, Toworth	0.0%	0.5%	3.2%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chapel Road, Stone, Toworth	0.0%	1.2%	4.6%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL TOWN CENTRE	0.0%	5.8%	30.0%	2.6%	5.3%	0.0%	0.4%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%
NEW MALDEN														
Wandsworth, New Malden	0.8%	0.0%	4.2%	28.8%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, New Malden	0.0%	0.0%	0.3%	3.1%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1, 2, New Malden	1.2%	0.0%	1.5%	4.4%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	2.4%	0.4%	0.0%
TOTAL NEW MALDEN IN CENTRE	2.0%	0.0%	6.0%	36.6%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	2.4%	0.4%	0.0%
TOTAL ROYAL BOROUGH OF KINGSTON	88.2%	84.6%	64.2%	55.4%	21.8%	10.1%	5.6%	3.4%	0.8%	1.7%	0.8%	3.7%	10.4%	22.0%
CHIEF FOODSTORES IN SUBURV AREA														
Stratford, Lower Richmond Road, Richmond (OUT OF CENTRE - Zone 2)	4.4%	0.0%	0.0%	0.0%	0.0%	21.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
Wandsworth, Upper Richmond Road, East Sheen (IN CENTRE - Zone 2 (B Richmond))	0.0%	0.0%	0.0%	0.0%	0.0%	19.8%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%
Stratford, Merton High Street, Merton (IN CENTRE - Zone 3 (B Merton))	0.0%	0.0%	0.0%	0.0%	0.0%	8.8%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	1.0%	0.0%
Tranco Epsa, Beverley Way, RAINES PARK (OUT OF CENTRE - Zone 3 (B Merton))	2.9%	7.5%	12.8%	21.8%	10.9%	0.0%	16.7%	0.0%	2.3%	0.0%	0.0%	4.1%	0.0%	1.4%
Wandsworth, Coombe Lane, RAINES PARK (EDGE OF CENTRE - Zone 3 (B Merton))	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	11.5%	0.0%	0.0%	2.8%	0.0%	2.4%	0.0%	0.0%
Stratford, Uxbridge Road, Hampton Hill, Hampton (OUT OF CENTRE - Zone 4 (B Richmond on Thames))	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	11.0%	4.2%	0.0%	0.0%	0.0%	13.2%	0.0%
Tranco Epsa, Magdon Road, Wandsworth, Twickenham (OUT OF CENTRE - Zone 4 (B Richmond))	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.2%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%
Tranco Epsa, Chelsea Park, Swan Lane, Wandsworth (OUT OF CENTRE - Zone 4 (B Richmond))	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.4%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%
Tranco Epsa, East Road, Sutton on Thames (OUT OF CENTRE - Zone 4 (B Richmond))	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	39.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Stratford, Epsom Way, Cobham (OUT OF CENTRE - Zone 5 (S Heathrow))	0.0%	0.0%	5.1%	0.0%	18.0%	0.0%	0.0%	0.0%	32.5%	0.0%	0.0%	1.8%	0.0%	0.0%
Stratford, Epsom Way, Cobham (OUT OF CENTRE - Zone 5 (S Heathrow))	0.0%	2.8%	3.0%	0.0%	0.8%	0.0%	0.7%	0.0%	0.0%	14.1%	0.0%	0.0%	0.0%	9.3%
Tranco, Chertsey Road, Leatherhead (OUT OF CENTRE - Zone 7 (Mole Valley))	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.6%	0.0%	0.0%	0.0%	0.0%
Tranco, Chertsey Road, Leatherhead (OUT OF CENTRE - Zone 7 (Mole Valley))	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.2%	18.3%	0.0%	0.0%	0.0%	0.0%
Asda, Romington Vale, RICHMOND (OUT OF CENTRE - Zone 8 (B Wandsworth))	0.3%	0.6%	5.2%	4.3%	2.5%	0.0%	2.2%	0.0%	0.0%	0.0%	11.0%	0.5%	0.7%	0.7%
Stratford, High Road, Baham (IN CENTRE - Zone 8 (B Wandsworth))	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%	0.0%
Stratford, High Road, Chiswick (IN CENTRE - Zone 8 (B Wandsworth))	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	5.4%	0.0%	0.0%	0.0%
Stratford, Goswell Lane, Wandsworth (EDGE OF CENTRE - Zone 8 (B Wandsworth))	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%	0.0%	0.0%
Stratford, London Road, North Cheam (OUT OF CENTRE - Zone 9 (B Sutton))	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	14.3%	0.0%	0.0%
Tranco Epsa, Oxted Road, Cheam, Sutton (OUT OF CENTRE - Zone 9)	0.4%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.7%	0.0%	15.2%	0.0%	0.0%
Tranco, Moll Road, West Molesey (OUT OF CENTRE - Zone 10 (E Mole Valley))	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.1%	0.0%	2.8%
Tranco Epsa, Barnes Wallis & Weybridge (OUT OF CENTRE - Zone 11 (E Mole Valley))	8.1%	12.0%	29.8%	32.8%	43.4%	36.9%	41.0%	47.3%	40.1%	47.8%	53.1%	47.7%	39.8%	24.6%
TOTAL OTHER FOODSTORES IN SUBURV AREA	6.7%	1.5%	7.0%	14.0%	31.8%	53.1%	47.3%	56.1%	47.0%	45.3%	54.8%	54.8%	53.1%	53.7%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Royal Borough of Kingston (MapInfo, Survey, ArcGIS)

Royal Borough of Kingston upon Thames
Town Centre Study 2013

2013 Convenience Baseline Position - No New Development

Table 5
Convenience Goods Allocation 2013 - Spend @ 2011 Prices

Zone	Royal Borough of Kingston upon Thames				Outside Royal Borough of Kingston upon Thames											TOTAL
	Zone 1a Kingston (G000)	Zone 1b Sutton (G000)	Zone 1c Toworth (G000)	Zone 1d New Malden Borough (G000)	Zone 2 Richmond (G000)	Zone 3 Wimbledon (G000)	Zone 4 Hounslow (G000)	Zone 5 Surrey (G000)	Zone 6 Epsom (G000)	Zone 7 Leatherhead (G000)	Zone 8 Wandsworth (G000)	Zone 9 Sutton (G000)	Zone 10 Merton (G000)	Zone 11 Wokingham (G000)		
WINDSON IN CENTRE	4,436	609	0	968	0	0	2,417	0	321	0	8,617	0	914	0	16,992	
Waltham, East/West, KINGSTON	6,125	203	186	894	273	6,495	8,831	534	0	2,295	3,330	2,729	13,034	0	46,904	
Waltham, Wood Street, KINGSTON	1,586	515	289	564	80	530	3,795	518	1,511	0	3,990	6,884	946	0	21,201	
Waltham, Grand Street, CHANCE STREET, KINGSTON	3,838	194	89	240	0	738	0	0	0	288	0	0	391	352	6,698	
Other Local Stores, KINGSTON TOWN CENTRE	15,008	1,561	554	3,168	385	7,561	10,044	1,042	1,832	2,683	15,937	9,613	15,286	352	63,026	
TOTAL KINGSTON IN CENTRE	32,116	0	1,193	14,729	0	9,340	0	0	0	0	0	0	2,225	0	46,462	
Waltham, Sully Road, KINGSTON (EDGE OF CENTRE)	14,984	2,424	1,542	7,739	613	2,420	4,672	0	12,126	0	8,286	1,621	763	3,771	50,260	
Waltham, London Road, KINGSTON (OUT OF CENTRE)	47,059	2,424	2,735	9218	613	11,960	4,672	0	12,126	0	8,286	1,621	3,698	3,771	96,702	
TOTAL KINGSTON OUT OF CENTRE	63,086	3,976	3,299	12,366	968	19,921	16,944	1,042	3,048	877	24,223	11,284	18,374	4,133	187,921	
SUTTON	4,474	21,616	4,548	0	2,256	0	0	0	0	1,357	0	0	0	20,139	54,891	
Waltham, SUTTON	4,111	15,601	2,556	0	2,833	0	0	0	0	472	0	0	0	9,432	36,464	
Waltham, SUTTON	307	4,977	779	0	169	0	0	0	0	0	0	0	0	352	6,894	
Other Local Stores, SUTTON	5,193	42,194	7,842	0	4,968	0	0	0	0	0	0	0	0	29,934	91,940	
TOTAL SUTTON IN CENTRE	10,007	60,808	13,969	0	5,170	0	0	0	0	0	0	0	0	30,218	131,094	
Waltham and SUTTON, TOLWORTH	0	813	6135	2076	915	1009	0	0	5084	0	0	0	0	0	16,000	
Waltham, TOLWORTH	0	1,562	1,932	337	483	0	0	0	0	0	0	0	0	0	4,304	
Waltham, TOLWORTH	0	307	1,192	0	384	0	0	0	0	0	0	0	0	0	1,883	
Other Local Stores, TOLWORTH	0	699	17,988	0	136	0	0	0	0	0	0	0	0	0	2,584	
TOTAL TOLWORTH IN CENTRE	0	3,381	11,018	2,412	1,918	1,009	0	0	5,084	0	0	0	0	0	24,801	
NEW MALDEN	651	0	1,528	26,554	0	1,009	0	0	0	0	0	0	0	0	29,741	
Waltham, NEW MALDEN	307	0	101	2,922	0	2,924	0	0	0	0	0	0	0	0	6,223	
Other Local Stores, NEW MALDEN	1,244	0	566	4,296	0	2,133	0	0	0	0	0	0	0	0	17,683	
TOTAL NEW MALDEN IN CENTRE	2,242	0	2,177	33,772	0	6,046	0	0	0	0	0	0	0	0	53,647	
TOTAL ROYAL BOROUGH OF KINGSTON	70,550	49,531	24,845	48,309	7,844	19,921	15,400	19,944	1,042	9,961	877	24,223	20,134	19,988	338,909	
OTHER FOODSTORES IN SURVEY AREA	3,775	0	0	0	0	41,896	0	0	0	0	21,135	11,179	0	0	67,985	
Waltham, Lower Richmond Road, RICHMOND (OUT OF CENTRE - Zone 2)	0	0	0	0	0	26,549	0	0	0	21,691	0	0	0	0	48,241	
Waltham, Upper Richmond Road, East Sheen (IN CENTRE - Zone 2/B Richmond)	0	0	0	0	0	21,076	0	0	0	14,252	3,846	0	0	0	39,175	
Waltham, Merton High Street, Merton (IN CENTRE - Zone 3/B Merton)	2,261	4,364	4,692	201,116	3,927	0	39,838	0	41,48	0	15,205	0	2,114	0	94,865	
Waltham, Bevois Avenue Way, BAYNES PARK (OUT OF CENTRE - Zone 3/B Merton)	0	0	0	684	0	0	2,422	0	0	2,995	0	8,892	0	0	30,993	
Waltham, Crombie Lane, Baynes Park (EDGE OF CENTRE - Zone 3/B Merton)	0	0	0	0	0	3,855	0	48,220	4,481	0	0	0	24,094	0	81,670	
Waltham, Badridge Road, Hampton Hill, Hampton (OUT OF CENTRE - Zone 4/B Richmond on Thames)	0	0	0	0	0	0	0	85,269	0	0	0	0	3,009	0	89,478	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 4/B Richmond on Thames)	0	0	0	0	0	0	0	11,100	0	0	19,685	0	0	0	30,785	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 4/B Richmond on Thames)	0	0	0	0	0	0	0	12,832	80,266	0	0	0	1,811	0	94,909	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 5/Spothorne)	319	0	0	0	0	0	0	0	0	0	0	0	0	0	319	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 6)	0	343	1,646	0	6,476	0	0	0	77,456	0	0	6,658	0	0	85,925	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 6)	0	1,640	1,117	0	273	0	1,722	0	0	15,246	0	0	1,154	0	19,779	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 7/Embridge)	0	0	0	0	289	0	0	0	14,777	19,014	0	0	0	0	34,000	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 7/Embridge)	0	0	0	0	3,769	0	0	0	13,076	19,838	0	0	0	0	36,683	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 7/Embridge)	287	342	1,922	3,942	915	0	5,100	0	0	72,943	1,941	1,258	1,104	0	83,614	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 8/B Wandsworth)	0	0	0	0	0	0	0	0	0	53,640	0	0	0	0	53,640	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 8/B Wandsworth)	0	0	0	0	0	0	8,649	0	0	35,799	0	0	0	0	44,448	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 8/B Wandsworth)	0	0	0	0	0	0	2,671	0	0	37,578	0	0	0	0	40,249	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 9/Sutton)	0	0	0	4,238	0	0	0	0	6,037	0	0	52,964	0	0	63,037	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 9)	0	0	0	0	0	0	1,297	0	12,126	0	0	56,236	0	0	69,659	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 9)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 10/B Bromley)	307	473	0	0	0	0	0	0	0	0	0	26,098	4,325	0	31,174	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 10/B Bromley)	0	0	186	546	0	0	0	0	0	0	0	0	0	0	732	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 10/B Bromley)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Waltham, Bevois Avenue Way, Bevois Avenue, WIMBORNE (OUT OF CENTRE - Zone 11/B Bromley)	5,730	7,422	9,684	29,928	15,648	72,220	97,889	207,846	58,987	86,417	59,356	276,220	148,918	60,898	1,170,366	
Other Foodstores in Survey Area	5,520	888	2,561	13,777	12,324	104,269	127,318	210,698	30,937	49,714	362,601	202,221	103,601	83,344	1,439,867	
TOTAL	82,781	57,890	36,771	92,210	36,016	198,390	238,614	499,898	127,286	181,702	108,246	643,248	349,272	183,225	2,968,743	

Source: Tables 3 & 4

Royal Borough of Kingston upon Thames
Town Centre Study 2013

2018 Convenience Baseline Position - No New Development

Table 4
Convenience Goods Allocation 2018 - Spend (£) 2011 Prices

Zone Centre	Royal Borough of Kingston upon Thames				Outside Royal Borough of Kingston upon Thames				TOTAL					
	Zone 1a Kingston (£000)	Zone 1b Sutton (£000)	Zone 1c Tolworth (£000)	Zone 1d New Malden / Sutton / Weybridge (£000)	Zone 2 Richmond (£000)	Zone 3 Wandsworth (£000)	Zone 4 Hounslow (£000)	Zone 5 Sunbury (£000)		Zone 6 Epsom (£000)	Zone 7 Leatherhead (£000)	Zone 8 Worsworth (£000)	Zone 9 Sutton (£000)	Zone 10 Walton (£000)
Kingston in Centre	4,696	651	0	990	0	0	2,648	0	342	0	9,209	0	972	0
Stratton's Eden Walk, Kingston	4,696	651	0	990	0	0	2,648	0	342	0	9,209	0	972	0
Watsons, Wood Street, Kingston	6,484	262	200	925	282	7,332	1,855	9,675	551	0	3,606	2,974	13,853	0
Mais and Sparrow, Clarence Street, Kingston	1,679	533	310	573	86	573	0	4,157	545	1,613	0	4,200	7,600	10,000
Other Local Stores, Kingston Town Centre	4,903	199	95	765	0	796	0	0	0	298	0	0	415	384
Total Kingston in Centre	15,622	1,655	605	3,233	368	8,600	1,855	16,480	1,096	1,956	908	17,264	10,672	16,246
Kingston Out of Centre	33,997	0	1,278	1,528	0	10,289	0	0	0	0	0	0	2,471	0
Stratton's, Tully Barn, Kingston (Edge of Centre)	15,842	2,508	1,653	7,997	0	2,800	5,214	0	1,298	0	8,971	1,756	811	4,033
Asda, London Road, Kingston (Out of Centre)	69,559	2,508	2,631	9,525	0	12,950	5,214	0	1,298	0	8,971	1,756	3,283	4,033
Total Kingston Out of Centre	66,781	4,113	3,536	12,776	1,003	21,850	7,659	16,480	1,096	3,254	998	26,226	12,539	19,559
Total Kingston	82,403	6,068	4,141	16,769	4,011	28,450	14,545	32,960	2,192	5,250	1,906	43,490	33,231	35,805
Sutton	4,737	22,302	4,875	0	2,855	0	0	0	0	1,449	0	0	0	21,382
Watsons, Sutton	4,737	22,302	4,875	0	2,855	0	0	0	0	1,449	0	0	0	21,382
Stratton's, Sutton	435	16,139	2,656	0	2,106	0	0	0	504	0	0	0	0	10,014
Other Local Stores, Sutton	305	5,149	835	0	175	0	0	0	0	0	0	0	0	384
Total Sutton in Centre	5,477	40,640	8,366	0	5,136	0	0	0	1,953	0	0	0	0	31,781
ICWORTH	0	841	6,437	2,144	948	0	1,126	0	5,428	0	0	0	0	17,663
Mais and Sparrow, ICWORTH	0	1,625	2,971	348	501	0	0	0	0	0	0	0	0	4,535
Sutton's, ICWORTH	0	318	1,277	0	398	0	0	0	0	0	0	0	0	1,993
Other Local Stores, ICWORTH	0	713	1,888	0	141	0	0	0	0	0	0	0	0	2,739
Total ICWORTH in Centre	0	3,477	11,810	2,492	1,987	0	1,126	0	5,428	0	0	0	0	24,320
NEW MALDEN	659	0	1,638	27,459	0	1,126	0	0	0	0	0	0	0	30,892
Co-op, New Malden	325	0	108	2,988	0	3,243	0	0	0	0	0	0	0	6,684
Other Local Stores, New Malden	1,339	0	609	4,429	0	2,381	0	0	0	0	0	0	0	19,211
Total New Malden in Centre	2,374	0	2,355	34,876	0	6,779	0	0	0	0	0	0	0	56,077
TOTAL ROYAL BOROUGH OF KINGSTON	74,652	91,240	26,096	50,127	4,105	12,200	14,965	16,480	1,096	10,635	908	26,226	21,956	20,885
ONE FOOT CORSE IN SUTTON AREA	3,997	0	0	0	0	45,041	0	0	0	0	22,882	1,284	0	73,204
Watsons, Upper Richmond Road, East Sheen (IN CENTRE - Zone 2) Richmond	0	0	0	0	0	28,679	0	0	0	0	20,864	0	0	52,164
Stratton's, Merion High Street, Merion (IN CENTRE - Zone 3) Merion	0	0	0	0	0	23,220	0	0	0	0	15,400	4,191	0	43,144
Reco Baha Bowley Way, RAINES PARK (OUT OF CENTRE - Zone 4) Merion	2,499	4,904	5,030	20,787	4,009	0	44,663	0	4,429	0	16,675	0	2,244	104,700
Watsons, Combs Lane, RAINES PARK (EDGE OF CENTRE - Zone 3) Merion	0	0	0	707	0	0	30,606	0	0	3,098	0	9,688	0	44,099
Stratton's, UDGAGE ROAD, HAMPTON HILL, HAMPTON (OUT OF CENTRE - Zone 4) B	0	0	0	0	0	4,272	0	52,824	5,667	0	0	0	2,569	68,337
Remploy (on Thames), UDGAGE ROAD, HAMPTON HILL, HAMPTON (OUT OF CENTRE - Zone 4) B	0	0	0	0	0	0	0	62,739	0	0	0	0	4,186	97,884
Stratton's, Coleridge Road, Hampton Hill, Hampton (OUT OF CENTRE - Zone 4) B	0	0	0	0	0	0	0	56,077	0	0	0	21,312	0	77,389
Stratton's, Coleridge Park, Spion Lane, Weybridge (OUT OF CENTRE - Zone 4) B	0	0	0	0	0	0	0	14,097	5,221	0	0	0	1,695	69,214
Reco Baha, Becot Road, Sunbury on Thames (OUT OF CENTRE - Zone 8) Spelthorne	0	330	0	0	0	0	0	0	63,549	0	0	7,142	0	79,341
Stratton's, Min Lane, EPCOM (OUT OF CENTRE - Zone 6)	0	358	2,036	6,709	0	0	0	0	0	0	0	0	0	37,460
Stratton's, Broga Way, Cobham (OUT OF CENTRE - Zone 7) Elmbridge	0	1,697	1,198	0	292	0	1,922	0	0	15,771	0	1,220	15,364	37,460
Stratton's, The Swan Centre, Leatherhead (IN CENTRE - Zone 7) Mole Valley	0	0	0	0	3,925	0	0	0	13,962	20,521	0	0	0	38,387
Reco, Cornhill Road, Leatherhead (OUT OF CENTRE - Zone 7) Mole Valley	0	0	0	0	0	0	0	0	0	0	0	0	0	15,979
Asda, Beaumont Vale, Richmond (OUT OF CENTRE - Zone 8) Wandsworth	304	354	2,050	4,074	948	0	3,759	0	0	0	78,973	2,115	1,137	97,095
Stratton's, High Road, Bainton (IN CENTRE - Zone 8) Wandsworth	0	0	0	0	0	0	0	0	0	0	89,074	0	0	58,074
Stratton's, Gifford Lane, Wandsworth (EDGE OF CENTRE - Zone 8) Wandsworth	0	0	0	0	0	0	9,694	0	0	0	38,758	0	0	48,452
Stratton's, London Road, North Cheam (OUT OF CENTRE - Zone 9) Sutton	0	0	0	0	0	0	2,981	0	0	0	4,684	0	0	43,465
Reco Baha, Oldfield Road, Cheam, Sutton (OUT OF CENTRE - Zone 9)	0	0	0	4,377	0	0	0	0	4,509	0	0	57,705	0	64,909
Reco, Hart Road, West Molesey (OUT OF CENTRE - Zone 10) Elmbridge	0	0	0	0	0	0	1,322	0	1,298	0	0	61,268	0	63,899
Reco, Hart Road, West Molesey (OUT OF CENTRE - Zone 10) Elmbridge	325	400	0	0	0	0	0	0	0	0	0	0	0	32,500
Reco Baha, Barnes Wallis Drive, Weybridge (OUT OF CENTRE - Zone 11) Elmbridge	0	203	978	0	0	0	0	0	0	0	0	0	0	27,108
Total One Foot Corse in Sutton Area	7,124	7,280	10,594	30,222	16,211	77,993	109,254	227,713	98,041	92,270	60,684	299,598	167,269	471,116
Total	81,876	91,820	36,790	80,349	4,316	12,973	16,183	17,704	2,192	11,833	969	27,456	23,186	21,945
Other	87,432	99,886	39,415	95,885	39,311	211,148	264,318	401,899	133,706	194,010	111,973	718,398	402,827	194,741
Total	174,308	191,706	76,205	186,234	83,627	244,121	430,182	603,693	247,902	388,020	213,943	1,136,794	635,613	314,686

Source: Tables 3.8.4

Royal Borough of Kingston upon Thames
Town Centre Study 2013

2013 Convenience Baseline Position - No New Development

Zone	Royal Borough of Kingston upon Thames				Outside Royal Borough of Kingston upon Thames										TOTAL
	Zone 1a Kingston	Zone 1b Sutton	Zone 1c Tolworth	Zone 1d New Malden	Zone 1e New Malden Borough	Zone 2 Richmond	Zone 3 Wimbledon	Zone 4 Harewood	Zone 5 Sutton	Zone 6 Leatherhead	Zone 7 Weybridge	Zone 8 Weybridge	Zone 9 Weybridge	Zone 10 Weybridge	
Centre	(GDD)	(GDD)	(GDD)	(GDD)	(GDD)	(GDD)	(GDD)	(GDD)	(GDD)	(GDD)	(GDD)	(GDD)	(GDD)	(GDD)	(GDD)
Kingston Centre	4694	663	0	1,638	0	0	2,895	0	0	320	0	10,057	0	1,646	0
Stamley's Eden Walk, Kingston	6,881	275	215	930	294	7,815	2,046	10,577	688	0	646	3,887	3,260	14,928	0
Mabley Wood Street, Kingston	1,782	559	333	601	89	619	0	4,546	581	1,344	0	4,657	823	1,082	0
Males and Sparrow, Charlton Street, Kingston	4,312	197	102	882	0	860	0	0	0	318	0	0	0	447	414
Other Local Stores, Kingston Town Centre	17,959	1,685	650	3,410	303	9,294	2,956	18,018	11,168	2,113	900	18,601	11,483	17,483	414
Total Kingston In Centre	70,814	4,317	3,061	13,397	1,040	20,356	7,797	18,018	11,168	3,517	960	20,272	13,419	21,015	4,726
Kingston Out of Centre															
Stamley's, Surrey Basin, Kingston (Edge of Centre)	36,881	0	1,274	1,602	0	10,903	0	0	0	0	0	0	0	2,640	0
Acta, London Road, Kingston (Out of Centre)	16,834	2,432	1,777	8,384	660	3,959	5,751	0	1,483	0	0	9,671	1,936	873	4,311
Total Kingston Out of Centre	53,715	2,432	3,151	9,986	660	13,962	5,751	0	1,483	0	0	9,671	1,936	3,513	4,311
Total Kingston	124,529	6,749	6,212	23,383	1,640	34,318	13,548	18,018	12,651	6,534	960	29,944	15,354	24,528	9,047
Sutton Centre															
Watrose, Sutton	5,027	23,470	5,240	0	2,971	0	0	0	0	1,266	0	0	0	0	2,029
Stamley's, Sutton	462	16,579	2,866	0	2,191	0	0	0	0	545	0	0	0	0	10,786
Other Local Stores, Sutton	345	5,404	893	0	182	0	0	0	0	0	0	0	0	0	414
Total Sutton In Centre	6,834	45,813	9,023	0	5,343	0	0	0	0	2,111	0	0	0	0	34,229
Sutton Out of Centre															
Males and Sparrow, Tolworth	0	963	7,048	2,248	964	0	1,242	0	0	5,846	0	0	0	0	18,293
Wentley, Tolworth	0	1,685	2,220	365	521	0	0	0	0	0	0	0	0	0	4,797
Budgets, Tolworth	0	333	1,273	0	414	0	0	0	0	0	0	0	0	0	2,100
Other Local Stores, Tolworth	0	749	2,026	0	146	0	0	0	0	0	0	0	0	0	2,921
Total Tolworth In Centre	0	3,649	12,649	2,413	2,007	0	1,242	0	0	5,846	0	0	0	0	26,131
Tolworth Out of Centre															
Watrose, New Malden	731	0	1,760	28,268	0	0	1,242	0	0	0	0	0	0	0	32,501
Co-op, New Malden	345	0	116	3,133	0	0	3,599	0	0	0	0	0	0	0	7,193
Other Local Stores, New Malden	1,443	0	664	4,644	0	0	2,426	0	0	0	0	0	0	0	20,132
Total New Malden In Centre	2,519	0	2,541	36,044	0	0	7,467	0	0	0	0	0	0	0	60,556
New Malden Out of Centre															
Total Royal Borough of Kingston	79,227	53,779	28,048	52,844	4,484	22,256	19,258	18,018	11,168	11,494	960	28,272	24,051	21,069	38,964
Other Foodstores in Survey Area															
Stamley's, Lower Richmond Road, Richmond (Out of Centre - Zone 2)	4241	0	0	0	0	48,676	0	0	0	0	0	24,687	1,483	0	78,992
Watrose, Upper Richmond Road, East Sheen (In Centre - Zone 2 LB Richmond)	0	0	0	0	0	30,993	0	0	0	0	0	28,317	0	0	59,310
Stamley's, Merton High Street, Merton (In Centre - Zone 3 LB Merton)	0	0	0	0	0	25,845	0	0	0	0	0	16,638	4,295	0	47,174
Reco Bina, Beverley Way, Raynes Park (Out of Centre - Zone 3 LB Merton)	2452	4,728	5,400	21,793	4233	0	49,042	0	0	4,786	0	18,283	0	2,417	113,340
Watrose, Coombe Lane, Raynes Park (Edge of Centre - Zone 3 LB Merton)	0	0	0	741	0	33,358	0	0	0	3,276	0	10,822	0	0	48,397
Stamley's, TONGUE ROAD, HAYLEIGH (OUT OF CENTRE - Zone 4 LB Richmond)	0	0	0	0	0	4,617	0	57,353	6,057	0	0	0	0	27,885	95,766
Stamley's, Coleridge Road, Isleworth (Out of Centre - Zone 4 LB Richmond)	0	0	0	0	0	0	102,467	0	0	0	0	0	0	4,471	106,938
Watrose, Coleridge Park, Sun Lane, Isleworth (Out of Centre - Zone 4 LB Richmond)	0	0	0	0	0	0	61,311	0	0	0	0	22,978	0	0	84,288
Reco Bina, Lord Road, Sunbury on Thames (Out of Centre - Zone 5 (Surrey) Home)	0	347	0	0	0	0	13,399	56,737	0	0	0	0	0	1,728	74,180
Stamley's, Min Lane, Epsom (Out of Centre - Zone 6)	0	373	2,243	0	6,980	0	0	0	68,337	0	0	0	7,881	0	86,543
Stamley's, Bridge Way, Cobham (Out of Centre - Zone 7 Elmbridge)	0	1,781	1,287	0	294	0	1,200	0	0	16,676	0	0	1,320	16,569	40,047
Reco, Outfall Road, Leatherhead (Out of Centre - Zone 7 (Middlesex) Home)	0	0	0	0	4062	0	0	0	15,988	21,699	0	0	0	0	40,680
Acta, Rebanham Vale, (KINGHAMPTON) (OUT OF CENTRE - Zone 8 LB Warminster)	322	371	2,214	4,271	966	0	6,032	0	0	0	0	85,136	2,919	1,409	104,272
Stamley's, High Road, Basing (In Centre - Zone 8 LB Warminster)	0	0	0	0	0	0	0	0	0	0	0	62,606	0	0	62,606
Stamley's, Green Lane, Wandsworth (Edge of Centre - Zone 8 LB Wandsworth)	0	0	0	0	0	0	10,998	0	0	0	0	41,783	0	0	52,781
Stamley's, London Road, North Cheam (Out of Centre - Zone 8 LB Wandsworth)	0	0	0	0	0	0	3,088	0	0	0	0	43,889	0	0	47,147
Reco Bina, Oldfield Road, Cheam, Sutton (Out of Centre - Zone 9)	0	0	0	4,589	0	0	0	0	0	5,205	0	0	6,870	0	73,163
Reco, Hart Road, West Molesey, (Out of Centre - Zone 10 Elmbridge)	345	514	0	0	0	0	0	1,446	0	1,483	0	0	6,717	0	70,228
Reco Bina, Barnes Wallis Drive, Westleigh (Out of Centre - Zone 11 Elmbridge)	0	0	215	1,825	0	0	0	0	0	0	0	0	0	21,622	24,476
Other Foodstores in Survey Area	7,581	8,113	11,286	32,419	16,865	84,286	102,594	248,964	62,794	99,717	53,851	32,298	175,556	62,227	1,347,403
Total	62,515	664	2,951	14,923	13,498	121,721	154,732	259,887	78,676	99,466	53,813	43,210	281,569	119,438	1,646,940
Total	93,002	62,885	42,350	99,889	38,817	229,246	293,741	526,869	145,036	209,667	118,603	774,440	441,125	209,544	1,773,347

Source: Tables 18 & 19

Royal Borough of Kingston upon Thames
Town Centre Study 2013

2028 Convenience Baseline Position - No New Development

Table 8
Convenience Goods Allocation 2028 - Spend @ 2011 Prices

Zone Centre	Royal Borough of Kingston upon Thames				Outside Royal Borough of Kingston upon Thames				TOTAL					
	Zone 1a Kingston (G002)	Zone 1b Sutton (G002)	Zone 1c Boworth (G002)	Zone 1d New Malden Borough (G002)	Zone 2 Richmond (G002)	Zone 3 Wimbledon (G002)	Zone 4 Hounslow (G002)	Zone 5 Sunbury (G002)	Zone 6 Epsom (G002)	Zone 7 Leatherhead (G002)	Zone 8 Weybridge (G002)	Zone 9 Sutton (G002)	Zone 10 Walton-on-Thames (G002)	Zone 11 Wokingham (G002)
KINGSTON IN CENTRE														
Stratbury's Eden Walk, KINGSTON	5,321	724	0	1,100	0	0	3,187	0	482	0	10,838	0	1,131	0
Watsons, Wood Street, KINGSTON	7,389	291	228	1,102	8,651	2,236	11,506	632	0	688	4,189	3,576	16,114	0
Marks and Spencer, Clarence Street, KINGSTON	1,914	593	303	639	95	669	0	4,957	684	1,890	0	5,018	9,019	1,170
Other Local Stores, KINGSTON TOWN CENTRE	4,630	177	108	853	0	930	0	0	0	306	0	0	483	448
Total Kingston in Centre	19,283	1,786	689	3,626	408	10,051	2,235	19,650	1,256	2,295	1,024	20,004	12,595	18,898
KINGSTON OUT OF CENTRE														
Stratbury's Sun Beam, KINGSTON (EDGE OF CENTRE)	38,740	0	1,456	1,704	0	11,791	0	0	0	0	0	0	2,978	0
Asda, London Road, KINGSTON (OUT OF CENTRE)	1,8075	2,791	1,883	8,914	705	3,308	4,282	0	1,524	0	10,422	2,123	583	4,661
Other Local Stores, KINGSTON (OUT OF CENTRE)	5,6375	2,791	3,540	10,615	705	15,899	2,282	0	1,524	0	10,422	2,123	3,918	4,661
Total Kingston Out of Centre	26,998	4,572	4,929	14,244	1,113	28,190	6,564	19,650	1,256	3,819	1,024	30,466	14,718	22,716
Total Kingston														
Total Kingston	46,281	6,358	9,618	27,870	2,121	56,340	18,814	39,300	2,512	6,114	2,048	60,470	27,311	41,614
NEW MALDEN														
Watsons, SUBSTON	5,398	24,883	5,554	3,170	0	0	0	0	0	1,701	0	0	0	24,897
Stratbury's, SUBSTON	466	17,859	3,059	2,338	0	0	0	0	0	952	0	0	0	11,651
Other Local Stores, SUBSTON	371	5,729	932	104	0	0	0	0	0	0	0	0	0	448
Total Substons in Centre	6,235	28,471	9,545	5,612	0	0	0	0	0	2,653	0	0	0	30,005
NEW MALDEN														
Marks and Spencer, TOWNHILL	0	936	7,600	2,300	1,052	0	1,587	0	0	0	0	0	0	19,997
Island, TOWNHILL	0	1,786	2,300	388	556	0	0	0	0	0	0	0	0	5,090
Budgens, TOWNHILL	0	393	1,455	0	442	0	0	0	0	0	0	0	0	2,290
Other Local Stores, TOWNHILL	0	794	2,147	0	156	0	0	0	0	0	0	0	0	3,097
Total Townhill in Centre	0	3,869	13,452	2,738	2,204	0	1,587	0	0	0	0	0	0	30,005
NEW MALDEN														
Watsons, NEW MALDEN	385	0	1,806	9,059	0	0	1,887	0	0	0	0	0	0	34,694
Co-op, NEW MALDEN	371	0	120	9,331	0	0	3,931	0	0	0	0	0	0	7,756
Other Local Stores, NEW MALDEN	1,549	0	684	4,937	0	0	2,868	0	0	0	0	0	0	22,889
Total New Malden in Centre	2,305	0	2,610	14,327	0	0	8,726	0	0	0	0	0	0	64,939
TOTAL ROYAL BOROUGH OF KINGSTON	66,907	57,017	29,731	58,977	9,020	28,190	18,099	19,650	1,256	12,481	1,024	30,466	28,379	23,596
OTHER COLOURS IN SAVE AREA														
Stratbury's, Lower Richmond Road, Richmond (OUT OF CENTRE - Zone 2)	4,564	0	0	0	52,438	0	0	0	0	0	26,881	1,544	0	83,318
Watsons, Upper Richmond Road, East Green (IN CENTRE - Zone 2, LB Richmond)	0	0	0	0	33,817	0	0	0	0	4,024	27,282	0	0	71,617
Stratbury's, Melton High Street, Melton (IN CENTRE - Zone 3, LB Melton)	0	0	0	0	0	28,340	0	0	0	0	17,925	5,039	0	51,305
Tesco Extra, Beverley Way, RAINES PARK (OUT OF CENTRE - Zone 3, LB Melton)	2,846	5,072	5,730	23,171	4,517	0	5,830	0	0	5,197	0	20,923	0	2,813
Watsons, Coombe Lane, RAINES PARK (OUT OF CENTRE - Zone 3, LB Melton)	0	0	0	788	0	0	3,674	0	0	0	0	11,630	0	52,888
Asda, Longbridge Road, Hampton (OUT OF CENTRE - Zone 4, LB Richmond on Thames)	0	0	0	0	4,993	0	60,966	6,514	0	0	0	0	29,788	0
Tesco Extra, Magdalen Road, Twickenham (OUT OF CENTRE - Zone 4, LB Hounslow)	0	0	0	0	0	0	11,172	0	0	0	0	0	4,833	0
Tesco Extra, Ottery Park, Sun Lane, Meworth (OUT OF CENTRE - Zone 4, LB Hounslow)	0	0	0	0	0	0	66,865	0	0	0	24,758	0	0	116,605
Tesco Extra, East Road, Sunbury on Thames (OUT OF CENTRE - Zone 5, Spelthorne)	0	367	0	0	0	0	16,762	0	0	0	0	0	1,867	0
Stratbury's, Mill Lane, IPSHAM (OUT OF CENTRE - Zone 6)	0	395	2,277	0	0	0	0	0	21,993	0	0	6,659	0	92,802
Stratbury's, Bridge Way, Cobham (OUT OF CENTRE - Zone 7, Basingstoke)	0	1,888	1,305	0	313	0	2,316	0	0	17,796	0	0	1,427	41,018
Tesco, Chertsey Road, Leatherhead (OUT OF CENTRE - Zone 7, Mole Valley)	0	0	0	0	332	0	0	1,850	21,027	0	0	0	0	23,209
Tesco, Chertsey Road, Leatherhead (OUT OF CENTRE - Zone 7, Mole Valley)	0	0	0	0	4,335	0	0	16,386	20,156	0	0	0	0	43,876
Asda, Roehampton Vale, ROEHAMPION (OUT OF CENTRE - Zone 8, LB Wandsworth)	346	394	2,347	4,541	1,052	0	6,938	0	0	0	9,142	2,540	1,556	13,855
Stratbury's, High Road, Brixton (IN CENTRE - Zone 8, LB Wandsworth)	0	0	0	0	0	0	0	0	0	0	0	0	0	67,464
Stratbury's, High Road, Chiswick (IN CENTRE - Zone 8, LB Wandsworth)	0	0	0	0	0	0	11,569	0	0	0	46,825	0	0	58,394
Stratbury's, Goswell Lane, Wandsworth (EDGE OF CENTRE - Zone 8, LB Wandsworth)	0	0	0	0	0	0	3,591	0	0	0	0	0	0	58,884
Stratbury's, London Road, North Cheam (OUT OF CENTRE - Zone 9, LB Sutton)	0	0	0	4,879	0	0	0	0	5,761	0	0	69,393	0	80,033
Tesco Extra, Offshore Road, Sutton (OUT OF CENTRE - Zone 9)	0	0	0	0	0	0	1,877	0	1,524	0	0	31,679	0	34,779
Tesco, Merton Road, Waltham Cross (OUT OF CENTRE - Zone 10, Basingstoke)	371	416	0	0	0	0	0	0	0	0	0	0	0	37,754
Tesco Extra, Barnes Wallis Drive, Weybridge (OUT OF CENTRE - Zone 11, Basingstoke)	0	0	228	1,990	0	0	0	0	0	0	0	0	0	3,999
Other Local Foodstores in Save Area	8,118	8,601	12,046	3,446	17,996	131,629	271,520	67,803	109,287	681,116	381,040	192,491	74,095	1,481,603
Total	6,673	1,022	3,128	18,669	14,403	133,633	171,522	283,443	84,492	106,918	57,212	456,050	264,560	1,827,917
TOTAL	99,858	66,641	44,905	104,515	41,420	287,901	300,640	574,640	183,271	227,666	126,352	834,557	483,650	3,746,578

Source: Nominet 8.4

Royal Borough of Kingston upon Thames Town Centre Study 2013

Table 10
Existing Convenience Goods Floorspace

	Total Net Fsq (Note A) (sqm)	Net Conv. Ratio (Note B) (%)	Net Convenience (sqm)	Co Average Sales (Note C) (\$ per sqm net)	Average Turnover 2013 (2009)
KINGSTON IN CENTRE					
Sainsbury's, Eden Walk, KINGSTON	968	87%	842	13,000	10,948
Waitrose, Wood Street, KINGSTON	2,639	87%	2,296	13,000	29,847
Marks and Spencer, Clarence Street, KINGSTON	1,100	90%	990	13,000	12,870
Other Local Stores, KINGSTON TOWN CENTRE	4,862	100%	4,862	6,500	31,603
Total Kingston In Centre	9,569	-	8,990	9,465	86,268
KINGSTON OUT OF CENTRE					
Sainsbury's, Sully Basin, KINGSTON EDGE OF CENTRE	3,808	85%	3,046	13,000	39,603
Asda, London Road, KINGSTON (OUT OF CENTRE)	1,773	60%	1,067	13,000	19,989
Total Kingston Out of Centre	5,581	-	4,553	13,000	59,191
Total Kingston	15,150	-	13,543	10,647	144,460
SURBITON					
Waitrose, SURBITON	1,908	88%	1,679	13,000	21,828
Sainsbury's, SURBITON	1,685	87%	1,466	13,000	19,057
Other Local Stores, SURBITON	1,389	100%	1,389	6,500	9,030
Total Surbiton In Centre	4,982	-	3,145	13,000	40,885
TOLWORTH					
Marks and Spencer's, TOLWORTH	1,265	93%	1,177	13,000	16,306
Iceland, TOLWORTH	570	90%	671	6,500	4,343
Budgens, TOLWORTH	722	93%	671	6,500	4,343
Other Local Stores, TOLWORTH	868	100%	868	6,500	5,771
Total Tolworth In Centre	3,445	-	3,408	8,746	29,804
NEW MALDEN					
Waitrose, NEW MALDEN	1,284	90%	1,156	13,000	16,023
Co-op, NEW MALDEN	829	89%	738	6,500	4,796
Other Local Stores, NEW MALDEN	2,060	100%	2,060	6,500	13,390
Total New Malden In Centre	4,173	-	3,953	8,400	33,209
TOTAL ROYAL BOROUGH OF KINGSTON	27,951	-	24,050	10,827	288,357
OTHER FOODSTORES IN SURVEY AREA					
Sainsbury's, Lower Richmond Road, Richmond (OUT OF CENTRE - Zone 2)	3,396	80%	2,717	13,000	35,323
Waitrose, Upper Richmond Road, East Sheen (IN CENTRE - Zone 2 LB Richmond)	1,393	95%	1,323	13,000	17,204
Sainsbury's, Merion High Street, Merion (IN CENTRE - Zone 3 LB Merion)	6,468	70%	4,528	13,000	58,863
Tesco Extra, Bevelley Way, RAYNES PARK (OUT OF CENTRE - Zone 3 LB Merion)	7,806	60%	4,684	13,000	60,887
Waitrose, Coombe Lane, Raynes Park (EDGE OF CENTRE - Zone 3 LB Merion)	1,129	90%	1,016	13,000	13,209
Sainsbury's, Uxbridge Road, Hampton Hill, Hampton (OUT OF CENTRE - Zone 4 LB Richmond)	5,256	70%	3,679	13,000	47,829
Tesco Extra, Magden Road, Isleworth, Twickenham (OUT OF CENTRE - Zone 4 LB Richmond)	4,824	64%	3,087	13,000	40,137
Tesco Extra, Otterley Park, Syon Lane, Isleworth (OUT OF CENTRE - Zone 4 LB Richmond)	6,521	64%	4,173	13,000	54,253
Tesco Extra, Escot Road, Sunbury on Thames (OUT OF CENTRE - Zone 5 Spelthorne)	4,831	65%	3,140	13,000	40,823
Sainsbury's, Kim Lane, EPSOM (OUT OF CENTRE - Zone 6)	5,107	78%	3,983	13,000	51,782
Sainsbury's, Bridge Way, Cobham (OUT OF CENTRE - Zone 7 Epsom)	4,850	70%	3,395	13,000	44,139
Sainsbury's, The Swan Centre, Leatherhead (IN CENTRE - Zone 7 Mole Valley)	2,621	74%	1,940	13,000	25,217
Tesco, Oxtot Road, Leatherhead (OUT OF CENTRE - Zone 7 Mole Valley)	2,309	63%	1,455	13,000	18,909
Asda, Reelamption Vale, ROHAMPTON (OUT OF CENTRE - Zone 8 LB Wandsworth)	5,270	60%	3,162	13,000	41,107
Sainsbury's, High Road, Barking (IN CENTRE - Zone 8 LB Wandsworth)	2,581	85%	2,194	13,000	28,520
Sainsbury's, High Road, Cheywick (IN CENTRE - Zone 8 LB Wandsworth)	3,857	80%	3,085	13,000	40,109
Sainsbury's, Garnett Lane, Wandsworth (EDGE OF CENTRE - Zone 8 LB Wandsworth)	4,131	70%	2,892	13,000	37,594
Sainsbury's, London Road, North Cheam (OUT OF CENTRE - Zone 9 LB Sutton)	6,445	75%	4,834	13,000	62,836
Tesco Extra, Oldfield Road, Cheam, Sutton (OUT OF CENTRE - Zone 9)	4,958	70%	3,219	13,000	41,845
Tesco, Hunt Road, West Molesey (OUT OF CENTRE - Zone 10 Epsom)	1,457	70%	1,020	13,000	13,261
Tesco Extra, Barnes Wallis Drive, Weybridge (OUT OF CENTRE - Zone 11 Epsom)	6,776	65%	4,404	13,000	57,254
Total Other Foodstores In Survey Area	91,627	-	63,931	13,000	831,101
TOTAL STUDY AREA (GLOBAL CONVENIENCE GOODS FLOORSPACE)	119,278	-	87,980	12,269	1,079,468

Note A: Rounded up figures derived from GSD J. European Good
 Note B: Net Convenience ratio, derived from Verdict Grocery Retailer 2010 / GVA assumptions
 Note C: Company average turnover derived from GVA assumptions

Royal Borough of Kingston upon Thames Town Centre Study 2013

**Table 11
Convenience Floorspace Commitments**

Zone	Net Convenience (sqm)	Benchmark Sales Density (\$ per sqm net)	Average Turnover 2013 (\$000s)	Average Turnover 2018 (\$000s)	Average Turnover 2023 (\$000s)	Average Turnover 2028 (\$000s)
1c	744	6,500	4,838	4,862	4,911	4,960
Total	744		4,838	4,862	4,911	4,960

Source: Royal Borough of Kingston upon Thames

Royal Borough of Kingston upon Thames Town Centre Study 2013

Capacity Projections: Convenience Goods

Table 12
Future Shop Floorspace Capacity in Royal Borough of Kingston upon Thames (GLOBAL BASELINE)

	CONVENIENCE GOODS			
	2013	2018	2023	2028
Total Available Expenditure in Study Area (£000)	2,968,743	3,199,713	3,459,912	3,746,378
Royal Borough of Kingston upon Thames Market Share	12	12	12	12
Catchment/Survey Area Residents Spending in <u>Royal Borough of Kingston upon Thames</u> (£000)	358,509	380,459	406,569	436,859
Existing Shop Floorspace (sqm net)	24,050	24,050	24,050	24,050
Sales per sqm net £	14,907	10,327	10,431	10,535
Sales from Existing Floorspace (£000)	358,509	248,357	250,851	253,369
Sales from Committed Floorspace (£000)	-	4,862	4,911	4,960
Residual Spending to Support new shops (£000)	-	127,240	150,807	178,530
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329
Capacity for new floorspace (sqm net)	-	9,739	11,428	13,394

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

Table 13
Future Convenience Shop Floorspace Capacity in Kingston Town Centre

	CONVENIENCE GOODS			
	2013	2018	2023	2028
Catchment/Survey Area Residents Spending in <u>Kingston</u> (£000)	187,921	200,919	215,579	232,486
Existing Shop Floorspace (sqm net) (including Kingston Out of Centre)	13,543	13,543	13,543	13,543
Sales per sqm net £	13,876	10,667	10,774	10,882
Sales from Existing Floorspace (£000)	187,921	144,460	145,910	147,375
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	-	56,459	69,669	85,111
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329
Capacity for new floorspace (sqm net)	0	4,321	5,279	6,385

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

Royal Borough of Kingston upon Thames Town Centre Study 2013

Capacity Projections: Convenience Goods

Table 14
Future Convenience Shop Floorspace Capacity in Surbiton

	CONVENIENCE GOODS			
	2013	2018	2023	2028
Catchment/Survey Area Residents Spending in <u>Surbiton</u> (£000)	91,940	96,413	102,353	109,400
Existing Shop Floorspace (sqm net)	3,145	3,145	3,145	3,145
Sales per sqm net £	29,234	13,000	13,131	13,262
Sales from Existing Floorspace (£000)	91,940	40,885	41,295	41,710
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	-	55,528	61,057	67,690
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329
Capacity for new floorspace (sqm net)	0	4,250	4,627	5,078

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

Table 15
Future Convenience Shop Floorspace Capacity in Tolworth

	CONVENIENCE GOODS			
	2013	2018	2023	2028
Catchment/Survey Area Residents Spending in <u>Tolworth</u> (£000)	24,801	26,320	28,131	30,035
Existing Shop Floorspace (sqm net)	3,408	3,408	3,408	3,408
Sales per sqm net £	7,278	8,746	8,833	8,922
Sales from Existing Floorspace (£000)	24,801	29,804	30,103	30,405
Sales from Committed Floorspace (£000)	0	4,862	4,911	4,960
Residual Spending to Support new shops (£000)	-	-8,346	-6,883	-5,331
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329
Capacity for new floorspace (sqm net)	0	-639	-522	-400

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

Royal Borough of Kingston upon Thames Town Centre Study 2013

Capacity Projections: Convenience Goods

Table 16
Future Convenience Shop Floorspace Capacity in New Malden

	CONVENIENCE GOODS			
	2013	2018	2023	2028
Catchment/Survey Area Residents Spending in New Malden (£000)	53,847	56,807	60,506	64,939
Existing Shop Floorspace (sqm net)	3,953	3,953	3,953	3,953
Sales per sqm net £	13,620	8,400	8,484	8,569
Sales from Existing Floorspace (£000)	53,847	33,209	33,542	33,879
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	-	23,599	26,964	31,060
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329
Capacity for new floorspace (sqm net)	0	1,806	2,043	2,330

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.



Report

Appendix 3
Comparison
Goods
Modelling

Royal Borough of Kingston upon Thames Town Centre Study 2013 Comparison Goods Modelling

Table 1
Survey Area Population Forecasts

	Royal Borough of Kingston upon Thames					Outside Royal Borough of Kingston upon Thames											Total
	Zone 1a	Zone 1b	Zone 1c	Zone 1d	Zone 1e	Zones 1a-e	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	
2013	43,900	30,700	19,500	48,900	19,100	162,100	87,609	109,819	255,638	63,262	90,889	51,856	300,955	190,442	89,395	71,444	1,473,407
2018	45,800	31,300	20,600	49,800	19,500	167,000	93,269	120,796	275,994	65,595	95,641	52,865	321,118	204,487	93,639	74,755	1,565,158
2023	47,200	31,900	21,500	50,700	19,700	171,000	97,876	129,378	293,017	67,904	100,368	54,283	336,158	217,717	97,850	78,182	1,643,733
2028	48,700	32,500	21,900	51,800	20,200	175,100	101,712	135,803	307,083	70,165	104,737	55,665	348,095	229,463	101,637	81,224	1,710,684

Source: Royal Borough of Kingston upon Thames Population Projections and Experian Micromarketer (ONS Revised Population Figures, Census 2011), April 2013

Wards and Postal Sectors by Zone	
Zone 1a	KINGSTON - Wards of Canbury, Grove, Norbiton and Tudor
Zone 1b	SURBITON - Wards of Berrylands, Surbiton Hill and St Marks
Zone 1c	TOLWORTH - Wards of Alexandra and Talworth and Hook Rise
Zone 1d	NEW MALDEN - Wards of Beverley, Coombe Hill, Coombe Vale, Old Malden and St James
Zone 1e	SOUTH OF THE BOROUGH - Wards of Chessington South and Chessington North and Hook
Zone 2	SW14 7/8, TW1 1/2/3/4, TW 9 1/2/3/4, TW10 5/6/7
Zone 3	SW19 1/2/3/4/5/6/7/8, SW20 0/8/9, part KT3 4/6
Zone 4	TW2 5/6/7, TW3 1/2/3/4, TW4 5/6/7, TW5 0/9, TW 7 4/5/6/7, TW8 0/8/9, TW13 4/5/6/7, TW14 0/8/9
Zone 5	TW15 1/2/3, TW16 5/6/7, TW17 0/8/9
Zone 6	KT17 1/2/3/4, KT18 5/6/7, KT19 0/7/8/9, KT21 1/2
Zone 7	KT11 1/2/3, KT22 0/7/8/9, KT23 3/4
Zone 8	SW11 6, SW12 8/9, SW13 0/8/9, SW15 1/2/3/4/5/6, SW17 0/7/8/9, SW18 1/2/3/4/5, W3 8, W4 1/2/3/4/5
Zone 9	KT4 7/8, SM1 1/2/3/4, SM2 5/6/7, SM3 8/9, SM4 4/5/6, SM5 1/2/3
Zone 10	KT1 4, KT8 0/1/2/9, KT12 2/3, TW11 0/8/9, TW12 1/2/3
Zone 11	KT7 0, KT10 0/8/9, KT12 1/4/5, KT13 0/8/9, part KT9 1, part KT6 5

Royal Borough of Kingston upon Thames Town Centre Study 2013

Comparison Goods Expenditure Forecasts

Table 2

Per Capita Comparison Goods Expenditure (2011 Prices)

Growth in comparison goods spending per capita:

2011 - 2012	1.4% pa
2012 - 2013	1.8% pa
2013 - 2018	2.8% pa
2018 - 2023	2.9% pa
2023 - 2028	2.9% pa

	Zone 1a	Zone 1b	Zone 1c	Zone 1d	Zone 1e	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2011	3,284	3,284	3,284	3,284	3,284	4,233	3,976	2,609	3,323	3,317	3,522	4,177	3,205	3,564	3,808
2013	3,390	3,390	3,390	3,390	3,390	4,370	4,104	2,693	3,430	3,424	3,636	4,312	3,308	3,679	3,931
2013 Minus SFT at 15%	2,881	2,881	2,881	2,881	2,881	3,714	3,489	2,289	2,916	2,910	3,090	3,665	2,812	3,127	3,341
2018	3,892	3,892	3,892	3,892	3,892	5,016	4,712	3,092	3,938	3,931	4,174	4,950	3,798	4,224	4,513
2018 Minus SFT at 18%	3,191	3,191	3,191	3,191	3,191	4,114	3,864	2,535	3,229	3,223	3,423	4,059	3,115	3,463	3,701
2023	4,490	4,490	4,490	4,490	4,490	5,787	5,436	3,567	4,543	4,535	4,815	5,711	4,382	4,873	5,206
2023 Minus SFT at 20%	3,592	3,592	3,592	3,592	3,592	4,630	4,349	2,854	3,635	3,628	3,852	4,569	3,505	3,898	4,165
2028	5,180	5,180	5,180	5,180	5,180	6,677	6,271	4,115	5,241	5,232	5,555	6,588	5,055	5,621	6,006
2028 Minus SFT at 20%	4,144	4,144	4,144	4,144	4,144	5,341	5,017	3,292	4,193	4,185	4,444	5,271	4,044	4,497	4,805

Source: Experian Micromarketer March 2013 and Experian Retail Planner 10.1 September 2012

Note: SFT deductions based on GVA assumption

Table 3

Total Survey Area Comparison Goods Expenditure (2011 Prices)

	Zone 1a	Zone 1b	Zone 1c	Zone 1d	Zone 1e	Zone 1a-e	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
2013	126,495	88,460	56,188	140,902	55,035	467,080	325,388	383,113	585,200	184,450	264,522	160,248	1,102,986	535,543	279,547	238,707	4,526,783
2018	146,162	99,888	65,741	158,927	62,230	532,948	383,664	466,727	699,744	211,820	308,287	180,935	1,303,449	636,881	324,309	276,631	5,325,394
2023	169,537	114,581	77,225	182,108	70,760	614,211	453,151	562,633	836,152	246,799	364,132	209,108	1,535,770	763,200	381,432	325,628	6,292,215
2028	201,803	134,673	90,749	214,649	83,705	725,578	543,270	681,319	1,010,939	294,202	438,370	247,381	1,834,667	927,974	457,072	390,280	7,551,053

Source: Tables 1 and 2

Royal Borough of Kingston upon Thames
Town Centre Study 2013

2013 Baseline Comparison Goods Market Share

Table 4
Comparison Goods Allocation 2013 - % of Market Share Position

Zone Centre	Royal Borough of Kingston upon Thames					Outside Royal Borough of Kingston upon Thames										
	Zone 1a Kingston (%)	Zone 1b Sutton (%)	Zone 1c Toworth (%)	Zone 1d New Malden Borough (%)	Zone 1e South of Borough (%)	Zone 2 Richmond (%)	Zone 3 Wimbledon (%)	Zone 4 Horslow (%)	Zone 5 Surrey (%)	Zone 6 Epsom (%)	Zone 7 Leatherhead (%)	Zone 8 Wandsworth (%)	Zone 9 Sutton (%)	Zone 10 Woburn Thames (%)	Zone 11 Esher / Weybridge (%)	
IN CENTRE RB KINGSTON UPON THAMES																
Kingston Town Centre (Zone 1a)	68.3%	64.0%	50.8%	52.4%	48.0%	37.7%	33.1%	26.8%	38.9%	33.0%	34.6%	21.0%	24.8%	54.7%	54.4%	
Sutton District Centre (Zone 1b)	3.4%	7.7%	3.9%	2.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	1.0%	
Toworth District Centre (Zone 1c)	0.0%	2.6%	5.7%	1.3%	1.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
New Malden District Centre (Zone 1d)	2.2%	1.3%	2.8%	7.7%	2.3%	0.4%	2.5%	0.1%	0.1%	1.3%	0.1%	0.0%	1.1%	0.3%	0.3%	
TOTAL IN CENTRE RB KINGSTON UPON THAMES	73.9%	75.7%	63.2%	63.4%	53.4%	38.1%	36.6%	24.9%	38.9%	35.1%	34.7%	21.1%	26.9%	55.2%	55.7%	
OUT OF CENTRE RB KINGSTON UPON THAMES																
Kingston Road Retail Park (OUT OF CENTRE - Zone 1d)	3.4%	0.9%	1.9%	1.3%	0.5%	0.1%	0.3%	0.0%	0.0%	0.4%	0.0%	0.4%	0.0%	0.0%	0.1%	
TOTAL OUT OF CENTRE RB KINGSTON UPON THAMES	3.4%	0.9%	1.9%	1.3%	0.5%	0.1%	0.3%	0.0%	0.0%	0.4%	0.0%	0.4%	0.0%	0.0%	0.1%	
TOTAL RB KINGSTON UPON THAMES	77.3%	76.6%	65.1%	64.7%	53.9%	38.2%	36.1%	24.9%	38.9%	35.5%	34.7%	21.5%	26.9%	55.2%	55.8%	
OTHER CENTRES IN SURVEY AREA																
Richmond (Zone 2)	1.7%	0.2%	0.3%	0.3%	0.0%	25.8%	1.3%	4.5%	0.7%	0.0%	0.0%	4.2%	0.0%	2.1%	0.4%	
Retail Warehousing near New Malden (OUT OF CENTRE - Zone 3) (including Shannon Corner, Beverley Way and Burlington Road Retail Parks)	5.9%	8.1%	17.0%	14.1%	13.8%	0.8%	8.1%	0.4%	0.4%	5.6%	0.3%	1.1%	3.5%	2.0%	3.9%	
Wimbledon (Zone 3)	1.1%	1.1%	1.8%	4.8%	0.6%	2.3%	27.4%	0.8%	0.0%	0.0%	0.0%	5.4%	5.5%	0.1%	0.2%	
Horslow (including Berrheim Centre) (Zone 4)	0.0%	0.2%	0.0%	0.0%	0.0%	1.7%	0.0%	16.8%	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	
Twickenham (Zone 4)	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	4.4%	1.4%	0.0%	0.0%	0.1%	0.0%	0.5%	0.0%	
Apex Retail Park and Homebase, Twickenham Road (Zone 4)	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	3.3%	2.2%	0.1%	0.0%	0.0%	0.0%	2.8%	0.0%	
Surrey on Thames (Zone 5)	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	
Ashford (Zone 5)	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.4%	2.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	
Epsom (Zone 6)	0.0%	0.4%	1.4%	0.2%	12.1%	0.0%	0.0%	0.1%	0.0%	31.6%	5.6%	0.0%	0.6%	0.0%	0.2%	
Leatherhead (Zone 7)	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	1.3%	7.6%	0.0%	0.0%	0.2%	0.0%	
Wandsworth (Zone 8)	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	3.4%	0.4%	0.0%	0.0%	
Sutton (Zone 9)	0.0%	0.0%	1.1%	2.6%	0.3%	0.0%	0.9%	0.0%	2.7%	0.6%	0.3%	31.9%	0.3%	0.3%	0.0%	
Woburn on Thames (Zone 10)	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	5.5%	0.0%	1.1%	0.0%	0.0%	10.6%	10.2%	
Weybridge (Zone 11)	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.5%	0.0%	2.1%	0.0%	0.0%	1.9%	5.5%	
TOTAL OTHER CENTRES IN SURVEY AREA	8.7%	10.1%	21.6%	21.9%	27.5%	32.9%	38.9%	30.8%	14.6%	41.2%	17.3%	14.4%	42.0%	21.0%	20.4%	
CENTRES OUTSIDE SURVEY AREA																
London West End	3.5%	6.6%	2.6%	5.3%	0.4%	11.0%	9.1%	4.0%	1.2%	3.0%	3.3%	19.6%	3.4%	2.5%	4.5%	
Staines	0.1%	0.3%	0.4%	0.0%	0.0%	0.0%	0.0%	6.9%	30.4%	0.0%	0.0%	0.0%	0.0%	0.4%	1.0%	
Westfield White City	1.1%	0.0%	0.0%	0.2%	0.1%	0.8%	0.7%	4.3%	0.0%	0.2%	0.0%	5.9%	0.3%	0.7%	0.0%	
Gulford	0.4%	0.8%	0.1%	0.0%	2.4%	0.0%	0.1%	0.0%	0.5%	2.2%	22.5%	0.1%	0.2%	0.7%	3.7%	
Croydon	0.1%	0.9%	1.0%	1.4%	0.2%	0.0%	0.2%	0.0%	3.3%	3.6%	0.3%	1.6%	12.9%	0.2%	0.6%	
TOTAL CENTRES OUTSIDE SURVEY AREA	5.2%	8.6%	4.1%	6.9%	3.2%	11.7%	10.2%	15.2%	35.6%	9.9%	26.2%	27.1%	16.6%	4.6%	9.9%	
Other	12.3%	5.7%	11.0%	7.8%	15.9%	17.3%	15.1%	27.1%	10.9%	14.6%	21.9%	37.4%	15.3%	19.2%	14.1%	
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: Royal Borough of Kingston Telephone Survey, April 2013

Note: Other includes expenditure on retail warehouse destinations

Note: Includes 70/30 weighting for first and second choice destinations for fashion shopping (clothing and footwear)

Note: Market shares for New Malden have been manually adjusted to reflect assumptions on trade being drawn to retail warehouses outside New Malden. See Economic Needs Assessment section of the main report for further details of adjustments.

Royal Borough of Kingston upon Thames
Town Centre Study 2013

2013 Baseline Comparison Goods

Table 10
Comparison Goods Allocation 2013 - Spend (9 2011 Prices)

Zone Centre	Royal Borough of Kingston upon Thames					Outside Royal Borough of Kingston upon Thames											TOTAL (9000)
	Zone 1a Kingston (9000)	Zone 1b Sutton (9000)	Zone 1c Toworth (9000)	Zone 1d New Malden (9000)	Zone 1e South of Borough (9000)	Zone 2 Richmond (9000)	Zone 3 Wimbledon (9000)	Zone 4 Hounslow (9000)	Zone 5 Surrey (9000)	Zone 6 Epsom (9000)	Zone 7 Leatherhead (9000)	Zone 8 Wandsworth (9000)	Zone 9 Sutton (9000)	Zone 10 Waltham Thames (9000)	Zone 11 Esher / Weybridge (9000)		
IN CENTRE RB KINGSTON UPON THAMES																	
Kingston Town Centre (Zone 1a)	86,407	56,640	28,540	73,877	26,415	122,773	126,955	156,951	71,667	89,271	56,463	231,881	132,926	152,934	129,842	1,642,841	
Sutton District Centre (Zone 1b)	4,242	6,837	2,176	2,818	1,146	0	0	0	0	0	0	0	0	646	2,278	20,151	
Toworth District Centre (Zone 1c)	0	2,335	3,304	1,774	560	0	370	0	0	0	0	0	0	0	0	8,234	
New Malden District Centre (Zone 1d)	2,785	1,114	1,574	10,268	1,267	1,163	9,794	585	163	3,320	112	315	5,920	748	834	49,641	
TOTAL IN CENTRE RB KINGSTON UPON THAMES	93,434	66,926	35,513	89,316	29,378	123,936	137,669	167,537	71,830	92,891	56,575	232,196	138,826	154,318	132,953	1,611,657	
OUT OF CENTRE RB KINGSTON UPON THAMES																	
Kingston Road Retail Park (OUT OF CENTRE - Zone 1a)	4,330	774	1,068	1,818	278	210	1,250	0	0	978	0	4,407	0	0	172	15,285	
TOTAL OUT OF CENTRE RB KINGSTON UPON THAMES	4,330	774	1,068	1,818	278	210	1,250	0	0	978	0	4,407	0	0	172	15,285	
TOTAL RB KINGSTON UPON THAMES	97,765	67,700	36,581	91,135	29,656	124,146	138,928	167,537	71,830	93,869	56,575	236,603	138,826	154,318	133,125	1,626,942	
OTHER CENTRES IN SURVEY AREA																	
Richmond (Zone 2)	2,134	168	188	354	0	83,969	6,139	26,267	1,299	0	0	46,275	0	6,000	965	121,167	
Retail Warehousing near New Malden (OUT OF CENTRE - Zone 3) (including Shannon Corner, Beverley Way and Burlington Road Retail Park)	7,481	7,143	9,562	19,841	7,590	2,759	31,200	2,842	661	14,920	833	12,041	18,762	5,650	9310	149,797	
Wimbledon (Zone 3)	1,351	1,008	1,003	6,629	323	7,419	104,678	4,624	0	0	0	59,076	29,513	245	369	216,428	
Hounslow (Including Bechheim Centre) (Zone 4)	0	195	0	0	0	5,832	0	98,161	189	0	0	0	0	747	0	104,976	
Twickenham (Zone 4)	0	0	0	0	0	4,620	0	26,217	2519	0	0	696	0	1,507	0	36,088	
Ashted Retail Park and Homebase, Twickenham Road (Zone 4)	0	0	0	0	0	802	0	19,183	3,983	133	0	0	0	7,895	84	32,010	
Surrey on Thames (Zone 5)	0	70	0	0	0	0	0	0	2,262	0	0	0	0	342	0	2,674	
Ashted (Zone 5)	0	0	0	0	0	1,209	0	2,170	4,867	269	0	0	0	0	84	9,090	
Epsom (Zone 6)	0	360	807	228	6,676	0	0	699	0	83,244	8,937	0	3,207	0	497	104,444	
Leatherhead (Zone 7)	0	0	0	0	323	0	0	0	0	3,386	13,127	0	0	644	0	14,978	
Wandsworth (Zone 8)	0	0	0	0	0	0	0	4,466	0	0	0	37,718	21,46	0	0	44,330	
Sutton (Zone 9)	0	0	699	3,646	186	0	3,511	0	0	7,111	665	3,727	171,098	868	0	191,711	
Waltham on Thames (Zone 10)	0	0	0	0	0	288	0	0	10,104	0	1,733	0	0	29,573	24,285	68,983	
Weybridge (Zone 11)	0	0	0	0	51	0	0	0	10,114	0	3,399	0	0	5,295	13,065	28,894	
TOTAL OTHER CENTRES IN SURVEY AREA	10,946	8,926	12,157	30,898	15,149	107,077	149,793	179,954	24,889	109,051	27,693	159,034	224,726	98,697	48,448	1,169,658	
CENTRES OUTSIDE SURVEY AREA																	
London West End	4,336	5,810	1,452	7,492	239	35,657	34,870	23,261	2,274	8,034	5,356	216,101	18,418	6,937	10,814	301,122	
Stones	145	268	244	0	0	0	0	40,574	61,684	0	0	0	0	1,111	2,358	106,383	
Watford White City	1,409	0	0	220	46	2,559	2,828	25,379	0	624	0	64,636	1,660	2,076	0	101,438	
Guildford	454	685	65	0	1,334	0	462	0	1,000	5,790	36,091	988	1,243	1,942	8,938	58,993	
Croydon	145	831	549	1,947	115	0	893	0	637	9,411	471	17,715	68,916	644	1,438	103,712	
TOTAL CENTRES OUTSIDE SURVEY AREA	6,539	7,594	2,329	9,660	1,724	38,216	39,023	87,214	65,595	23,859	41,918	299,441	90,237	12,730	23,548	751,647	
Other	15,655	5,014	6,528	11,028	8,774	56,199	67,838	158,496	20,135	38,221	36,062	442,315	81,755	63,802	33,657	994,420	
Total Spend	126,495	86,440	54,188	149,002	55,085	325,368	383,113	646,200	184,460	264,822	160,248	1,102,946	535,543	279,547	233,707	4,526,783	

Royal Borough of Kingston upon Thames
Town Centre Study 2013

2013 Baseline Comparison Goods

Table 5b
Comparison Goods Allocation 2013 - % Market Share Baseline and Shared (S 2011 Prices)

	North Zone Zones 1a/1b/1c/1d/1e/1f/1g/1h	East Zone Zones 1a/3/9	South Zone Zones 1a/3/1b/1c/1d/1e/1f/1g/1h	West Zone Zones 4/5/10
	(%)	(£000)	(%)	(£000)
KINGSTON UPON THAMES				
Kingston Town Centre (Zone 1a)	27%	\$307,656	46%	\$429,675
South District Centre (Zone 1b)	0%	\$2,121	2%	\$1,627
Central District Centre (Zone 1c)	0%	0	1%	\$6,000
New Malden District Centre (Zone 1d)	0%	\$2,871	2%	\$9,612
TOTAL CENTRE IN KINGSTON UPON THAMES	27%	\$312,648	50%	\$446,914
OUT OF CENTRE IN KINGSTON UPON THAMES				
Kingston Road Retail Park (OUT OF CENTRE - Zone 1a)	0%	\$0,000	1%	\$0,455
TOTAL OUT OF CENTRE IN KINGSTON UPON THAMES	0%	\$0,000	1%	\$0,455
TOTAL IN KINGSTON UPON THAMES	27%	\$312,648	50%	\$447,369
OTHER CENTRES IN SURVEY AREA				
Beaconsfield Zone 2	9%	\$100,241	1%	\$6,493
Beal Works and near New Malden (OUT OF CENTRE - Zone 3) (Including Barton Corner, Severely Way and Burlington Road Retail Park)	1%	\$18,561	7%	\$69,864
Wimbledon Zone 3	0%	\$67,170	13%	\$141,220
Four New (Including Batterley Centre) (Zone 4)	0%	\$5,662	0%	\$0
Twickenham (Zone 4)	0%	\$5,216	0%	\$0
Kingston Road and Homebase, Inclusion Road (Zone 4)	0%	\$802	0%	\$0
Surfway Home (Zone 5)	0%	\$1,109	0%	\$0
Amex (Zone 5)	0%	\$0	0%	\$0
Broom (Zone 6)	0%	\$0	0%	\$0
Leatherhead (Zone 7)	3%	\$37,718	1%	\$6,612
Worcester (Zone 8)	0%	\$3,272	17%	\$178,255
Surfway (Zone 9)	0%	\$288	0%	\$0
Winton on Thames (Zone 10)	0%	\$0	0%	\$0
Weybridge (Zone 11)	0%	\$0	0%	\$0
TOTAL OTHER CENTRES IN SURVEY AREA	14%	\$217,996	34%	\$464,617
TOTAL OUTSIDE SURVEY AREA			26%	\$227,100
TOTAL			100%	\$1,049,197
London West End	17%	\$25,051	4%	\$3,999
Staines	0%	\$73	0%	\$2,962
Westend White City	0%	\$0,000	0%	\$1,274
Guildford	0%	\$1,215	0%	\$53,130
Oxendon	1%	\$17,788	7%	\$71,705
TOTAL OUTSIDE SURVEY AREA	20%	\$44,027	11%	\$104,233
Other	30%	\$476,252	10%	\$135,144
TOTAL	100%	\$1,099,957	100%	\$990,492
TOTAL			100%	\$1,049,197

Royal Borough of Kingston upon Thames Town Centre Study 2013

2018 Baseline Comparison Position

Table 6
Comparison Goods Allocation 2018 - Spend (© 2011 Prices)

Zone Centre	Royal Borough of Kingston upon Thames					Outside Royal Borough of Kingston upon Thames											TOTAL (£000)
	Zone 1a (£000)	Zone 1b (£000)	Zone 1c (£000)	Zone 1d (£000)	Zone 1e South of Borough (£000)	Richmond (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Sunbury (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 Wandsworth (£000)	Sutton (£000)	Walton on Thames (£000)	
IN CENTRE RB KINGSTON UPON THAMES																	
Kingston Town Centre (Zone 1a)	99,841	63,958	33,392	83,350	29,868	144,761	154,663	187,672	82,302	104,390	62,623	274,025	158,054	177,422	150,471		1,806,792
Subtlety District Centre (Zone 1b)	4,901	7,720	2,566	3,179	1,296	0	0	0	0	0	0	0	0	738	2,640		23,041
Tolworth District Centre (Zone 1c)	0	2,637	3,749	2,001	622	0	451	0	0	0	0	0	0	0	0		9,460
New Malden District Centre (Zone 1d)	3,218	1,258	1,841	12,213	1,432	1,371	11,822	700	187	3,869	126	372	7,040	868	966		47,284
TOTAL IN CENTRE RB KINGSTON UPON THAMES	107,961	76,572	41,551	100,742	33,219	146,133	166,935	188,372	82,489	108,260	62,749	274,397	166,094	179,027	154,076		1,886,577
OUT OF CENTRE RB KINGSTON UPON THAMES																	
Kingston Road Retail Park (OUT OF CENTRE - Zone 1d)	5,004	874	1,249	2,051	315	247	1,522	0	0	1,139	0	5,207	0	0	199		17,809
TOTAL OUT OF CENTRE RB KINGSTON UPON THAMES	5,004	874	1,249	2,051	315	247	1,522	0	0	1,139	0	5,207	0	0	199		17,809
TOTAL RB KINGSTON UPON THAMES	112,965	76,446	42,800	102,793	33,533	146,380	168,458	188,372	82,489	109,399	62,749	279,604	166,094	179,027	154,276		1,904,386
OTHER CENTRES IN SURVEY AREA																	
Richmond (Zone 2)	2,466	179	218	399	0	98,925	6,260	31,396	1,492	0	0	54,095	0	6,961	1,118		203,509
Retail Warehousing near New Malden (OUT OF CENTRE - Zone 3) (Including Shannon Corner, Beverley Way and Burlington Road Retail Parks)	8,644	8,066	11,187	22,380	8,583	3,253	38,009	2,800	748	17,388	602	14,230	22,313	6,555	10,789		176,547
Wimbledon (Zone 3)	1,561	1,138	1,174	7,702	365	6,748	127,748	5,200	0	0	0	69,813	35,098	285	415		259,357
Hounslow (including Berghem Centre) (Zone 4)	0	222	0	0	0	6,582	0	117,375	217	0	0	0	0	867	0		126,242
Twickenham (Zone 4)	0	0	0	0	0	5,447	0	31,947	2,892	0	0	822	0	1,748	0		42,857
Apple Retail Park and Homebase, Twickenham Road (Zone 4)	0	0	0	0	0	945	0	22,937	4,574	155	0	0	0	9,079	97		37,787
Sunbury on Thames (Zone 5)	0	79	0	0	0	0	0	0	2,598	0	0	0	0	397	0		3,073
Ashford (Zone 5)	0	0	0	0	0	2,015	0	2,595	5,590	302	0	0	0	0	0		10,600
Epsom (Zone 6)	0	395	944	287	7,549	0	0	836	0	97,017	10,990	0	3,813	0	576		121,477
Leatherhead (Zone 7)	0	0	0	0	365	0	0	0	0	3,944	13,692	0	0	747	0		16,748
Wandsworth (Zone 8)	0	0	0	0	0	0	5,440	0	0	0	0	44,574	2,552	0	0		52,566
Sutton (Zone 9)	0	0	701	4,112	210	0	4,277	0	0	8,288	1,090	4,404	203,475	1,007	0		227,564
Walton-on-Thames (Zone 10)	0	0	0	0	0	340	0	0	11,603	0	1,957	0	0	34,308	28,143		76,951
Weybridge (Zone 11)	0	0	0	0	58	0	0	0	1,164	0	3,837	0	0	6,143	15,141		26,343
TOTAL OTHER CENTRES IN SURVEY AREA	12,671	10,079	14,224	34,850	17,130	126,254	181,754	215,177	30,879	127,093	31,266	187,938	267,250	68,096	56,377		1,381,041
CENTRES OUTSIDE SURVEY AREA																	
London West End	5,068	6,561	1,699	8,451	271	42,043	40,480	27,814	2,612	9,364	6,047	255,376	21,904	8,071	12,532		450,291
Staines	168	302	285	0	0	0	0	48,516	70,837	0	0	0	1,288	2,733			124,129
Westfield White City	1,628	0	0	249	52	3,018	3,445	30,347	0	727	0	76,384	1,974	2,409	0		120,231
Guildford	525	773	76	0	1,593	0	79	0	356	2,186	14,806	89	153	694	2,462		23,793
Croydon	168	939	642	1,380	137	0	153	0	227	3,554	193	1,604	8,460	230	396		18,084
TOTAL CENTRES OUTSIDE SURVEY AREA	7,556	8,575	2,702	10,696	1,961	45,060	47,576	106,676	75,529	27,807	47,339	353,663	107,312	14,769	27,290		684,699
Other	17,974	5,662	7,264	12,438	9,921	66,217	70,462	189,519	23,123	45,127	39,589	487,252	97,225	63,417	38,888		1,173,077
Total Spend	146,162	99,888	65,741	158,927	65,230	383,644	446,727	699,744	211,820	308,287	180,935	1,303,449	636,881	324,309	276,631		5,325,394

Source: Tables 3.8 & 3.9

**Royal Borough of Kingston upon Thames
Town Centre Study 2013**

2023 Baseline Comparison Position

**Table 7
Comparison Geogr. Allocation 2023 - Spend @ 2011 Prices**

Zone Centre	Royal Borough of Kingston upon Thames										Outside Royal Borough of Kingston upon Thames										TOTAL (£000)
	Zone 1a Kingston (£000)	Zone 1b Sutton (£000)	Zone 1c Townsh (£000)	Zone 1d New Midd (£000)	Zone 1e South of (£000)	Zone 2 Richmond (£000)	Zone 3 Wimbledon (£000)	Zone 4 Hounslow (£000)	Zone 5 Surrey (£000)	Zone 6 Epsom (£000)	Zone 7 Leatherhead (£000)	Zone 8 Wandsworth (£000)	Zone 9 Sutton (£000)	Zone 10 Walton on (£000)	Zone 11 Esher / Weybridge (£000)						
IN CENTRE RB KINGSTON UPON THAMES																					
Kingston Town Centre (Zone 1a)	115,808	75,566	39,226	95,508	33,962	170,980	186,445	224,257	95,893	123,300	72,374	322,866	189,402	208,672	177,122	2,129,179					
Sutton District Centre (Zone 1b)	5,685	8,856	3,017	3,642	1,473	0	0	0	0	0	0	0	0	668	3,107	26,448					
Townsh District Centre (Zone 1c)	0	3,024	4,404	2,293	708	1,620	544	0	2,293	0	0	0	0	0	0	10,972					
New Midd District Centre (Zone 1d)	3,733	1,443	2,163	13,994	1,628	1,620	14,251	837	218	4,570	146	489	8,436	1,021	1,137	55,635					
TOTAL IN CENTRE RB KINGSTON UPON THAMES	125,227	86,688	48,810	116,437	37,772	172,600	201,238	225,093	96,111	127,870	72,520	323,364	197,839	210,540	181,366	2,222,434					
OUT OF CENTRE RB KINGSTON UPON THAMES																					
Kingston Road Retail Park (OUT OF CENTRE - Zone 1d)	5,804	1,003	1,468	2,350	358	292	1,835	0	0	1,346	0	6,136	0	0	234	20,826					
TOTAL OUT OF CENTRE RB KINGSTON UPON THAMES	5,804	1,003	1,468	2,350	358	292	1,835	0	0	1,346	0	6,136	0	0	234	20,826					
TOTAL RB KINGSTON UPON THAMES	131,031	87,691	50,277	117,787	38,130	172,892	203,073	225,093	96,111	129,216	72,520	329,440	197,839	210,540	181,601	2,243,260					
OTHER CENTRES IN SURVEY AREA																					
Richmond (Zone 2)	2,860	205	256	457	0	116,841	7,547	37,517	1,739	0	0	63,737	0	8,187	1,317	200,661					
Retail Warehousing near New Middlen (OUT OF CENTRE - Zone 3) (Including Shannon Corner, Beverley Way and Burlington Road Retail Parks)	10,027	9,253	13,142	25,644	9,759	3,842	45,820	3,345	872	20,538	696	16,766	26,738	7,709	12,700	206,851					
Wimbledon (Zone 3)	1,811	1,306	1,379	8,826	415	10,332	15,402	6,322	0	0	0	82,256	40,059	535	489	309,551					
Hounslow (including Bleinheim Centre) (Zone 4)	0	254	0	0	0	7,774	0	140,256	262	0	0	0	0	1,020	0	149,556					
Twickenham (Zone 4)	0	0	0	0	0	6,434	0	38,175	3,370	0	0	989	0	2,056	0	51,003					
Apex Retail Park and Homebase, Twickenham Road (Zone 4)	0	0	0	0	0	1,116	0	27,409	5,330	183	0	0	0	10,678	114	44,830					
Sutton on Thames (Zone 5)	0	90	0	0	0	0	0	3,027	0	0	0	0	0	466	0	3,584					
Ashford (Zone 5)	0	0	0	0	0	2,380	0	3,101	6,513	357	0	0	0	0	114	12,445					
Epsom (Zone 6)	0	453	1,109	296	8,583	0	0	999	0	114,591	11,661	0	4,570	0	678	142,939					
Leatherhead (Zone 7)	0	0	0	0	415	0	0	0	0	4,658	15,824	0	0	879	0	21,777					
Wandsworth (Zone 8)	0	0	0	0	0	0	6,558	0	0	0	52,518	3,058	0	0	0	62,135					
Sutton (Zone 9)	0	0	824	4,712	239	0	5,156	0	0	9,789	1,259	5,189	248,832	1,184	0	272,184					
Walton on Thames (Zone 10)	0	0	0	0	66	471	0	0	13,619	0	2,262	0	0	40,351	33,128	89,661					
Weybridge (Zone 11)	0	0	0	0	0	0	0	0	1,357	0	4,435	0	0	7,225	17,822	30,905					
TOTAL OTHER CENTRES IN SURVEY AREA	14,697	11,561	16,709	39,934	19,478	149,120	219,102	257,124	35,978	150,116	36,137	221,435	320,257	80,090	66,343	1,438,101					
CENTRES OUTSIDE SURVEY AREA																					
London West End	5,879	7,526	1,996	9,684	308	49,267	51,209	33,236	3,043	11,060	6,989	300,893	26,248	9,492	14,762	531,971					
Staines	194	347	335	0	0	0	0	57,973	82,534	0	0	0	0	1,515	3,217	146,116					
Westfield White City	1,888	0	0	285	59	3,564	4,153	36,262	0	859	0	89,998	2,365	2,833	0	142,267					
Guildford	609	887	89	0	1,715	0	679	0	1,338	7,970	47,096	1,376	1,771	2,650	12,193	78,373					
Croydon	194	1,077	754	2,517	148	0	1,311	0	882	12,955	614	24,666	98,211	879	1,961	146,140					
TOTAL CENTRES OUTSIDE SURVEY AREA	8,765	9,836	3,174	12,485	2,230	53,221	57,332	127,472	87,768	32,844	54,698	416,933	128,596	17,370	32,123	1,044,868					
Other	20,848	6,495	8,533	14,253	11,281	78,210	84,940	226,464	26,942	53,301	45,753	574,097	116,509	73,411	45,776	1,386,812					
Total Spend	169,537	114,581	77,225	182,108	70,760	463,151	542,633	636,152	246,799	641,132	209,108	1,585,770	765,200	381,432	326,628	6,292,215					

Source: Tables 3.8.4

Royal Borough of Kingston upon Thames
Town Centre Study 2013

2028 Baseline Comparison Position

Table 8
Comparison Goods Allocation 2028 - Spend (€) 2011 Prices

Zone Centre	Royal Borough of Kingston upon Thames				Outside Royal Borough of Kingston upon Thames										TOTAL (€000)	
	Zone 1a (€000)	Zone 1b (€000)	Zone 1c (€000)	Zone 1d (€000)	Zone 1e South of Borough (€000)	Zone 2 Richmond (€000)	Zone 3 Wimbledon (€000)	Zone 4 Hounslow (€000)	Zone 5 Sunbury (€000)	Zone 6 Epsom (€000)	Zone 7 Leatherhead (€000)	Zone 8 Wardsworth (€000)	Zone 9 Sutton (€000)	Zone 10 Walton on Thames (€000)		Zone 11 Esher / Weybridge (€000)
IN CENTRE RB KINGSTON UPON THAMES																
Kingston Town Centre (Zone 1a)	137,849	86,231	46,095	112,574	40,175	204,983	225,773	271,135	114,312	146,438	85,620	385,703	230,294	250,053	212,289	2,581,593
Surrey District Centre (Zone 1b)	6,767	10,409	3,545	4,293	1,743	0	0	0	0	0	0	0	0	1,040	3,724	31,921
Tolworth District Centre (Zone 1c)	0	3,555	5,175	2,702	837	0	658	0	0	0	0	0	0	0	0	12,928
New Malden District Centre (Zone 1d)	4,443	1,696	2,542	16,465	1,926	1,942	17,257	1,011	260	5,502	172	524	10,258	1,223	1,363	66,615
TOTAL IN CENTRE RB KINGSTON UPON THAMES	149,050	101,890	57,387	134,064	44,442	206,925	243,689	272,146	114,571	153,940	85,793	386,227	240,582	252,316	217,376	2,652,595
OUT OF CENTRE RB KINGSTON UPON THAMES																
Kingston Road Retail Park (OUT OF CENTRE - Zone 1a)	6,909	1,179	1,725	2,770	483	350	2,222	0	0	1,620	0	7,330	0	0	281	24,809
TOTAL OUT OF CENTRE RB KINGSTON UPON THAMES	6,909	1,179	1,725	2,770	423	350	2,222	0	0	1,620	0	7,330	0	0	281	24,809
TOTAL RB KINGSTON UPON THAMES	155,959	103,069	59,112	136,834	45,105	207,275	245,911	272,146	114,571	155,560	85,793	393,557	240,582	252,316	217,657	2,677,395
OTHER CENTRES IN SURVEY AREA																
Richmond (Zone 2)	3,424	241	301	539	0	14,078	9,139	45,359	2,072	0	0	76,141	0	9,811	1,578	288,663
Royal Wapping near New Malden (OUT OF CENTRE - Zone 3) (Including Shannon Corner, Beverley Way and Burlington Road Retail Park)	11,935	10,875	15,443	30,226	11,544	4,606	55,485	4,046	1,039	24,725	824	20,029	32,511	9,238	15,222	247,748
Wimbledon (Zone 3)	2,155	1,535	1,621	10,403	491	12,387	186,513	7,643	0	0	0	98,265	51,139	401	586	373,139
Hounslow (Including Blenheim Centre) (Zone 4)	0	299	0	0	0	9,320	0	169,574	301	0	0	0	0	1,222	0	180,716
Twickenham (Zone 4)	0	0	0	0	0	7,713	0	46,154	4,017	0	1,158	0	0	2,463	0	61,506
Apex Retail Park and Homebase, Twickenham Road (Zone 4)	0	0	0	0	0	1,338	0	33,138	6,354	220	0	0	0	12,795	137	53,982
Sunbury on Thames (Zone 5)	0	106	0	0	0	0	0	0	3,609	0	0	0	0	559	0	4,273
Asford (Zone 5)	0	0	0	0	0	2,864	0	3,749	7,764	430	0	0	0	0	0	14,534
Epsom (Zone 6)	0	533	1,303	347	10,154	0	0	1,208	0	137,953	13,796	0	5,556	0	813	171,662
Leatherhead (Zone 7)	0	0	0	0	491	0	0	0	0	5,608	18,720	0	0	1,053	0	25,873
Wandsworth (Zone 8)	0	0	0	0	0	0	7942	0	0	0	0	62,740	3,718	0	0	74,480
Sutton (Zone 9)	0	0	968	5,554	282	0	6,243	0	11,765	1,490	6,199	296,475	1,419	0	0	330,416
Walton-on-Thames (Zone 10)	0	0	0	0	0	481	0	0	16,116	0	2,676	0	0	48,353	39,705	107,331
Weybridge (Zone 11)	0	0	0	0	78	0	0	0	1,617	0	5,246	0	0	8,668	21,361	36,960
TOTAL OTHER CENTRES IN SURVEY AREA	17,494	13,589	19,635	47,809	23,041	178,776	265,322	310,872	42,889	180,721	42,751	244,531	399,400	96,973	79,539	1,971,601
CENTRES OUTSIDE SURVEY AREA																
London West End	6,996	8,846	2,345	11,414	364	59,553	62,011	40,165	3,628	13,315	8,266	359,654	31,915	11,375	17,680	637,309
Staines	231	428	394	0	0	0	0	70,092	98,397	0	0	0	0	1,816	3,856	175,183
Westfield White City	2,247	0	0	336	70	4,273	5,029	43,845	0	1,034	0	107,514	2,876	3,395	0	170,617
Quidford	725	1,042	104	0	2,029	0	822	0	1,895	9,595	55,716	1,644	2,154	3,176	14,614	93,216
Croydon	231	1,265	886	2,967	175	0	1,587	0	1,016	15,596	726	29,467	119,415	1,053	2,351	176,737
TOTAL OTHER CENTRES OUTSIDE SURVEY AREA	10,433	11,541	3,730	14,716	2,638	63,806	69,450	154,118	104,626	39,540	64,710	498,079	156,360	20,814	38,801	435,077
Other	24,816	7,634	10,027	16,799	13,345	93,763	102,858	273,803	32,116	64,168	54,127	685,830	141,663	87,969	64,864	1,663,784
Total Spend	201,803	134,673	90,749	214,649	83,765	543,270	681,319	1,010,939	294,202	438,370	247,381	1,834,657	927,974	457,072	390,280	7,551,053

Source: Tables 8.8.4

Royal Borough of Kingston upon Thames Town Centre Study 2013

Table 10: Existing Comparison Goods Floorspace (In-Centre)

	Net Floorspace (sqm)
Kingston Town Centre (Zone 1a)	164,739
Surbiton District Centre (Zone 1b)	7,428
Tolworth District Centre (Zone 1c)	5,672
New Malden District Centre (Zone 1d)	6,083
TOTAL IN CENTRE RB KINGSTON UPON THAMES	183,922
Kingston Road Retail Park (Zone 1d)	5,445
TOTAL OUT OF CENTRE RB KINGSTON UPON THAMES	5,445
TOTAL COMPARISON FLOORSPACE RB KINGSTON UPON THAMES	189,367

Source: Experian Good / IGD / Royal Borough of Kingston Upon Thames

Note: Includes comparison goods floorspace from main foodstores

Royal Borough of Kingston upon Thames Town Centre Study 2013

Table 11: Comparison Goods Commitments

	Survey Zone	Net Comparison Floorspace (sqm)	Benchmark Sales Density (\$/sqm net)	Average Turnover 2013 (\$000)	Average Turnover 2018 2018 (\$000)	Average Turnover 2023 (\$000)	Average Turnover 2028 (\$000)
Primark refurbishment and extension, 70-78 Eden Street, KINGSTON UPON THAMES (IN CENTRE) Application reference: 12/12754	1a	3,800	7,000	26,600	29,513	32,425	35,450
Eden Walk Shopping Centre, KINGSTON UPON THAMES (IN CENTRE) Application reference: 11/12278	1a	316	7,000	2,211	2,453	2,696	2,947
John Lewis, Clarence Street, KINGSTON UPON THAMES (IN CENTRE) Application reference: 12/12845/FUL	1a	438	7,000	3,066	3,402	3,737	4,086
Land adjacent to 2 Ellerton Road, SURBITON (EDGE OF EWELL ROAD NORTH LOCAL CENTRE) Application reference: 10/16400	1b	203	6,000	1,221	1,354	1,488	1,627
39-42 Victoria Road, SURBITON (IN CENTRE) Application reference: 09/16331/FUL	1b	312	6,000	1,872	2,077	2,282	2,495
Total		5,069	-	34,970	38,799	42,628	46,605

Source: Royal Borough of Kingston Upon Thames / Egl
Sales densities derived from Mintel UK Retail Rankings 2010/11

Royal Borough of Kingston upon Thames Town Centre Study 2013

Scenario A Baseline Capacity Projections: Comparison Goods

Table 12
Future Shop Floorspace Capacity in Royal Borough of Kingston Upon Thames (GLOBAL BASELINE) (Including Commitments)

	2013	COMPARISON GOODS		
		2018	2023	2028
Total Available Expenditure (£000)	4,526,783	5,325,394	6,292,215	7,551,053
Market Share from Survey Area	36	36	36	36
Survey Area Residents Spending (£000)	1,626,942	1,904,386	2,243,260	2,687,395
Inflow to Kingston from Beyond Survey Area (10% Inflow) (£000)	171,427	200,755	236,575	283,503
Total Royal Borough of Kingston Upon Thames Comparison Goods Turnover With INFLOW (£000)	1,798,368	2,105,141	2,479,835	2,970,898
Existing Retail Floorspace (sqm net)	189,367	189,367	189,367	189,367
Sales per sqm net (£)	9,497	10,537	11,576	12,656
Sales from Existing Floorspace (£000)	1,798,368	1,995,296	2,192,190	2,396,719
Sales from Commitments (£000)	0	38,799	42,628	46,605
Residual Spending to support new floorspace (£000)	0	71,045	245,017	527,573
Sales per sqm net in new shops (£)	6,000	6,657	7,314	7,996
Capacity for new floorspace (sqm net)	0	10,672	33,500	65,977

Source: Experian Micromarketer March 2013 and Experian Retail Planner 10.1 September 2012
Note: SFT deductions based on GVA assumption

Table 13
Future Shop Floorspace Capacity in Kingston Town Centre

	2013	COMPARISON GOODS		
		2018	2023	2028
Total Available Expenditure (£000)	4,526,783	5,325,394	6,292,215	7,551,053
Market Share from Survey Area	34	34	34	34
Survey Area Residents Spending (£000)	1,542,841	1,806,792	2,129,179	2,551,523
Inflow to Kingston Town Centre from Beyond Survey Area (£000)	171,427	200,755	236,575	283,503
Total Kingston Comparison Goods Turnover With INFLOW (£000)	1,714,268	2,007,546	2,365,754	2,835,026
Existing Retail Floorspace (sqm net)	164,739	164,739	164,739	164,739
Sales per sqm net (£)	10,406	11,545	12,685	13,868
Sales from Existing Floorspace (£000)	1,714,268	1,901,986	2,089,673	2,284,637
Sales from Commitments (£000)	0	35,368	38,858	42,483
Residual Spending to support new floorspace (£000)	0	70,192	237,223	507,905
Sales per sqm net in new shops (£)	7,000	7,767	8,533	9,329
Capacity for new floorspace (sqm net)	0	9,038	27,801	54,444

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028

Royal Borough of Kingston upon Thames Town Centre Study 2013

Scenario A Baseline Capacity Projections: Comparison Goods

Table 14
Future Shop Floorspace Capacity in Surbiton

	COMPARISON GOODS			
	2013	2018	2023	2028
Total Available Expenditure (£000)	4,526,783	5,325,394	6,292,215	7,551,053
Market Share from Survey Area	0	0	0	0
Survey Area Residents Spending (£000)	20,151	23,041	26,648	31,521
Inflow to Surbiton from Beyond Survey Area (£000)	0	0	0	0
Total Surbiton Comparison Goods Turnover With INFLOW (£000)	20,151	23,041	26,648	31,521
Existing Retail Floorspace (sqm net)	7,428	7,428	7,428	7,428
Sales per sqm net (£)	2,713	3,010	3,307	3,616
Sales from Existing Floorspace (£000)	20,151	22,358	24,564	26,856
Sales from Commitments (£000)	0	2,077	2,282	2,495
Residual Spending to support new floorspace (£000)	0	-1,394	-198	2,170
Sales per sqm net in new shops (£)	6,000	6,657	7,314	7,996
Capacity for new floorspace (sqm net)	0	-209	-27	271

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028

Table 15
Future Shop Floorspace Capacity in Tolworth

	COMPARISON GOODS			
	2013	2018	2023	2028
Total Available Expenditure (£000)	4,526,783	5,325,394	6,292,215	7,551,053
Market Share from Survey Area	0	0	0	0
Survey Area Residents Spending (£000)	8,234	9,460	10,972	12,928
Inflow to Tolworth from Beyond Survey Area (£000)	0	0	0	0
Total Tolworth Comparison Goods Turnover With INFLOW (£000)	8,234	9,460	10,972	12,928
Existing Retail Floorspace (sqm net)	5,672	5,672	5,672	5,672
Sales per sqm net (£)	1,452	1,610	1,769	1,934
Sales from Existing Floorspace (£000)	8,234	9,135	10,037	10,973
Sales from Commitments (£000)	0	0	0	0
Residual Spending to support new floorspace (£000)	0	325	936	1,955
Sales per sqm net in new shops (£)	6,000	6,657	7,314	7,996
Capacity for new floorspace (sqm net)	0	49	128	244

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028

Royal Borough of Kingston upon Thames Town Centre Study 2013

Scenario Baseline Capacity Projections: Comparison Goods

Table 16
Future Shop Floorspace Capacity in New Malden

	COMPARISON GOODS			
	2013	2018	2023	2028
Total Available Expenditure (£000)	4,526,783	5,325,394	6,292,215	7,551,053
Market Share from Survey Area	1	1	1	1
Survey Area Residents Spending (£000)	40,431	47,284	55,635	66,615
Inflow to New Malden from Beyond Survey Area (£000)	0	0	0	0
Total New Malden Comparison Goods Turnover With INFLOW (£000)	40,431	47,284	55,635	66,615
Existing Retail Floorspace (sqm net)	6,083	6,083	6,083	6,083
Sales per sqm net (£)	6,646	7,374	8,102	8,858
Sales from Existing Floorspace (£000)	40,431	44,858	49,285	53,883
Sales from Commitments (£000)	0	0	0	0
Residual Spending to support new floorspace (£000)	0	2,426	6,351	12,732
Sales per sqm net in new shops (£)	6,000	6,657	7,314	7,996
Capacity for new floorspace (sqm net)	0	364	868	1,592

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028

Royal Borough of Kingston Upon Thames Town Centre Study 2013

Scenario B Capacity Projections: Comparison Goods

Table 17
Future Shop Floorspace Capacity in Kingston Town Centre (Reduced Market Share)

	COMPARISON GOODS			
	2013	2018	2023	2028
Total Available Expenditure (£000)	4,526,783	5,325,394	6,292,215	7,551,053
Market Share from Survey Area	34	34	34	34
Survey Area Residents Spending (£000)	1,542,841	1,806,792	2,129,179	2,551,523
Inflow to Kingston Town Centre from Beyond Survey Area (£000)	171,427	200,755	236,575	283,503
Total Kingston Comparison Goods Turnover With INFLOW (£000)	1,714,268	2,007,546	2,365,754	2,835,026
Existing Retail Floorspace (sqm net)	164,739	164,739	164,739	164,739
Sales per sqm net (£)	10,406	11,545	12,685	13,868
Sales from Existing Floorspace (£000)	1,714,268	1,901,986	2,089,673	2,284,637
Sales from Commitments (£000)	0	35,368	38,858	42,483
Claw Back to Competing Centres	0	154,992	183,764	221,165
Residual Spending to support new floorspace (£000)	0	-84,800	53,459	286,740
Sales per sqm net in new shops (£)	7,000	7,767	8,533	9,329
Capacity for new floorspace (sqm net)	0	-10,919	6,265	30,736

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028



Report

Plans



Plan 1: Household Telephone Survey Area Plan

Key

— Kingston borough boundary

■ Survey zones

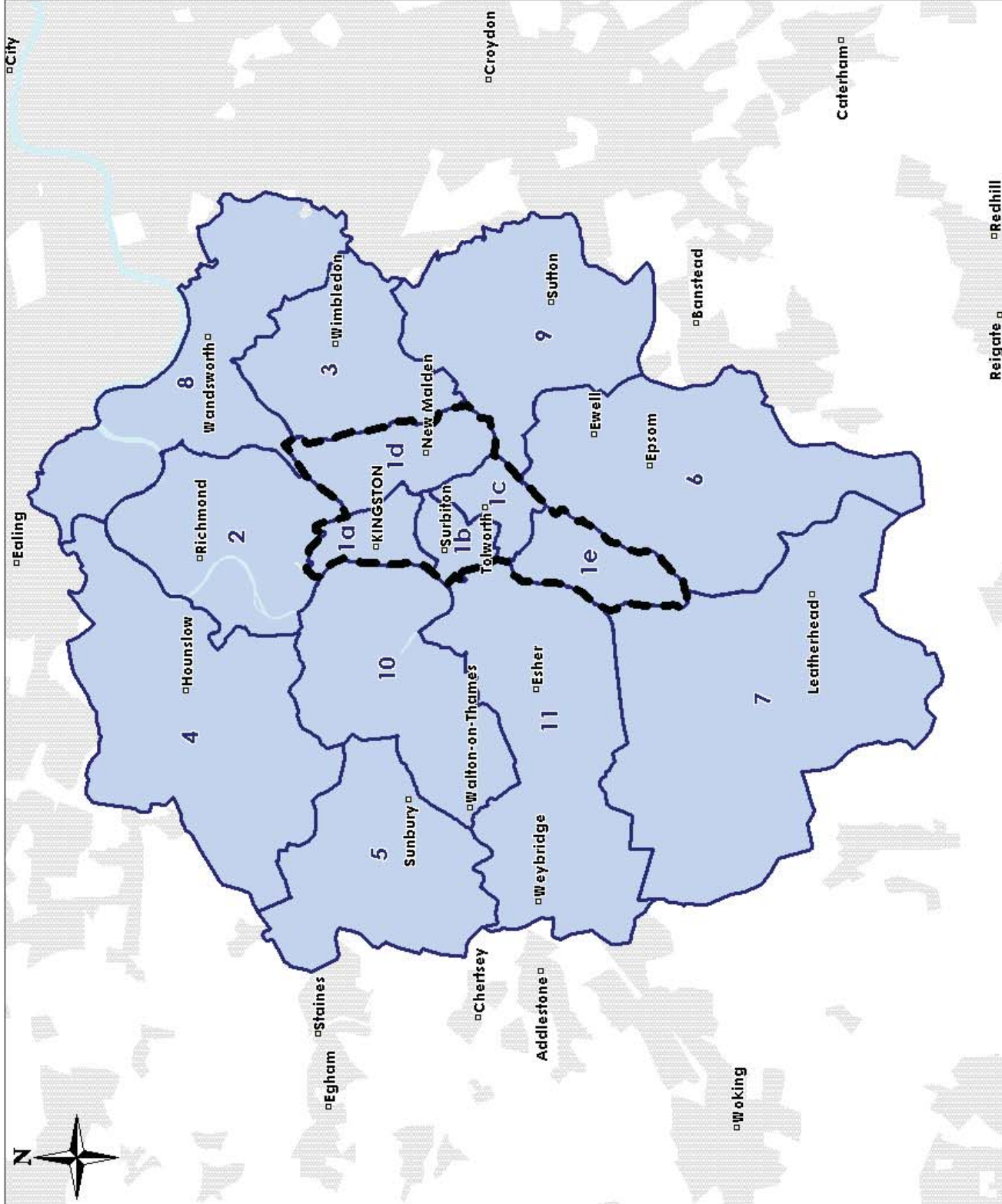
Zone

- 1a Tudor, Canbury, Grove, Norbiton
- 1b St Marks, Berrylands, Surbiton Hill
- 1c Alexandra, Tolworth & Hook Rise
- 1d Coombe Hill, Coombe Vale, Beverley
- 1e St James, Old Malden

Postal sectors

- 2 SW1 4 7/8, TW1 1/2/3/4, TW9 1/2/3/4, TW10 5/6/7
- 3 SW19 1/2/3/4/5/6/7/8, SW20 0/8/9
- 4 TW2 5/6/7, TW3 1/2/3/4, TW4 5/6/7, TW5 0/9, TW7 4/5/6/7, TW8 0/8/9, TW13 4/5/6/7, TW14 0/8/9
- 5 TW15 1/2/3, TW16 5/6/7, TW17 0/8/9, KT1 7/1/2/3/4, KT18 5/6/7, KT19 0/1/1/8/9, KT21 1/2
- 6 KT1 1/2/3, KT22 0/7/8/9, KT23 3/4
- 7 KT1 6, SW12 8/9, SW13 0/8/9
- 8 SW15 1/2/3/4/5/6, SW17 0/7/8/9
- 9 SW18 1/2/3/4/5, W3 8, W4 1/2/3/4/5, KT4 7/8, SM1 1/2/3/4, SM2 5/6/7
- 10 SM3 8/9, SM4 4/5/6, SM5 1/2/3, KT1 4, KT8 0/1/2/9, KT1 2/2/3, TW11 0/8/9, TW12 1/2/3
- 11 KT7 0, KT10 0/8/9, KT12 1/4/5, KT13 0/8/9

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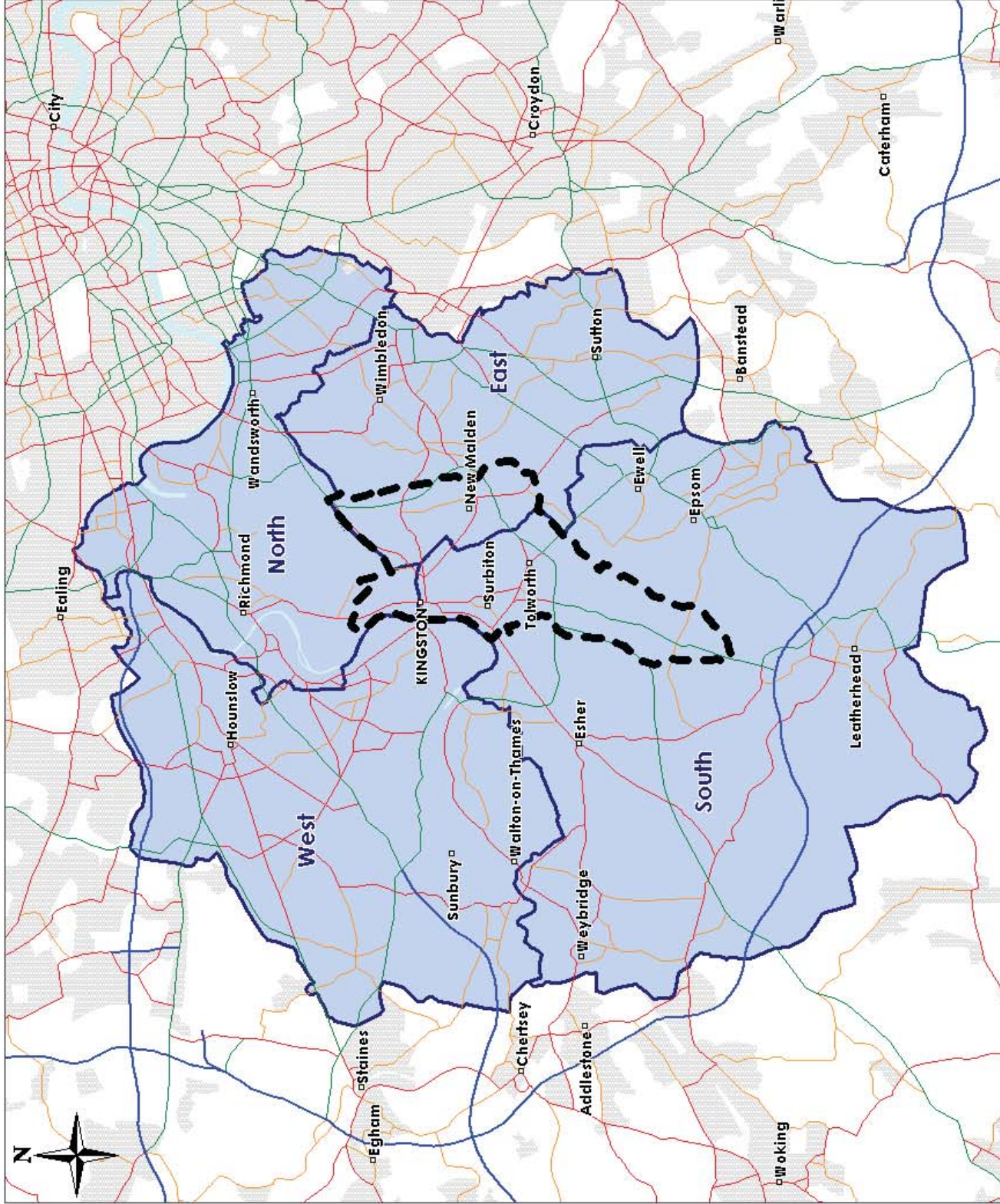


Plan 2: Kingston Survey Area Sub Zones Plan

Key

--- Kingston borough boundary

■ Survey zones



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Plan 3: Distribution of Metropolitan Centres in South West London Plan

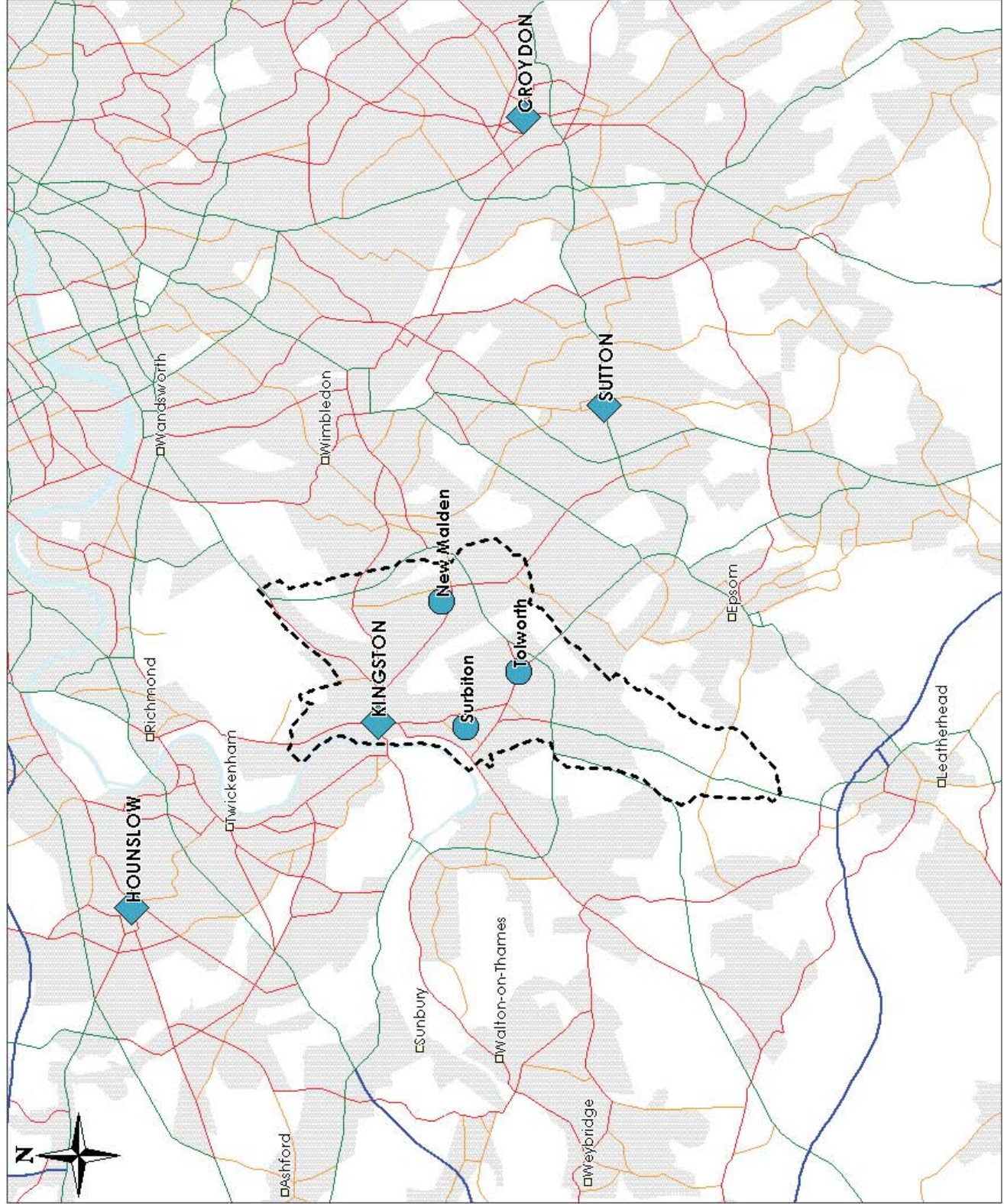
Key

--- Kingston borough boundary

◆ Metropolitan

● District

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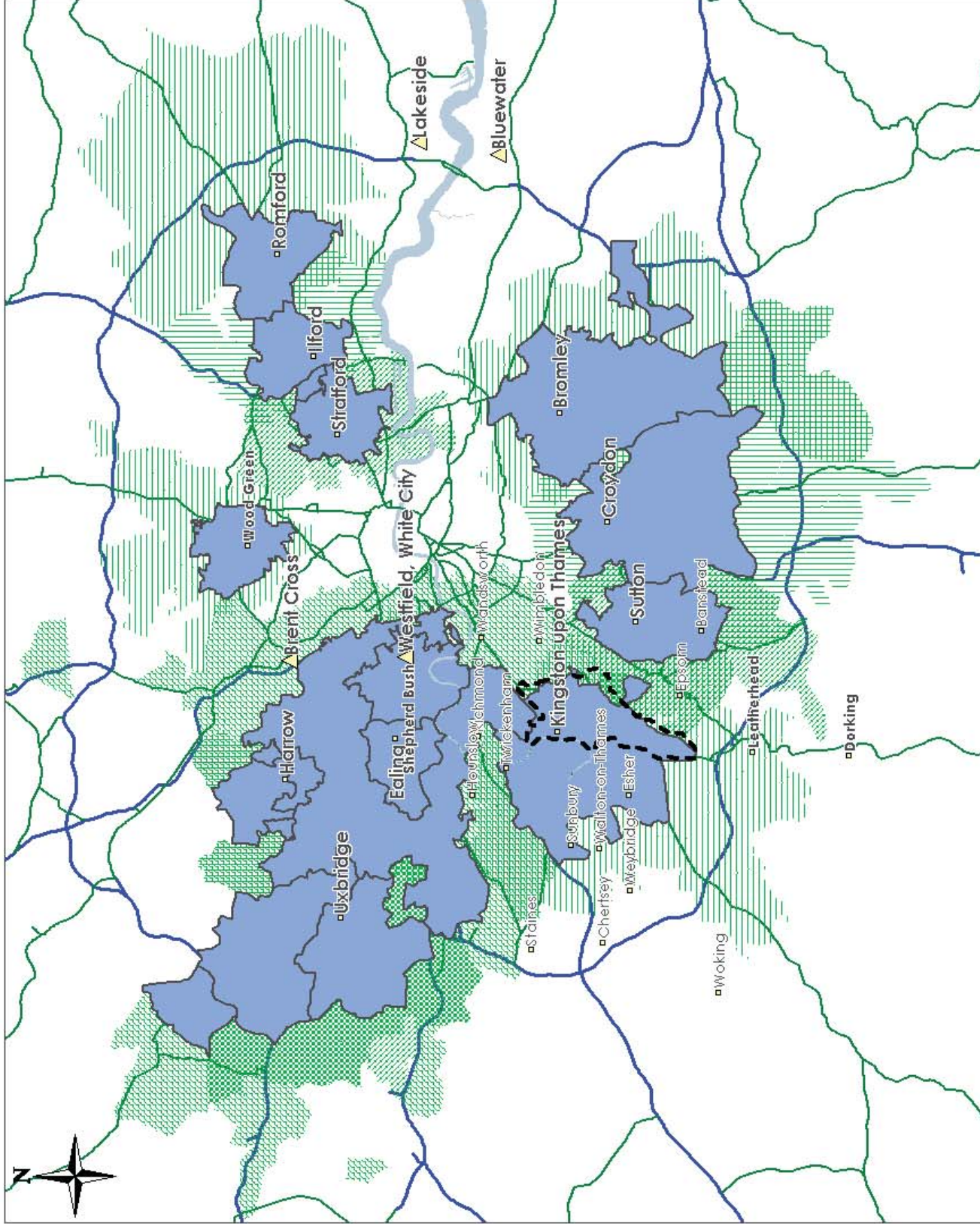
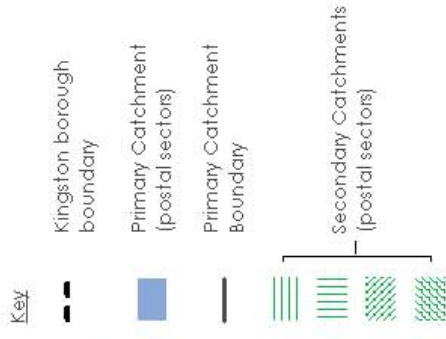


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Plan 4: London Metropolitan Centres Catchment Area Plan



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 Catchment Data Source: CACI InSite 2012

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**Plan 5: Royal Borough of Kingston
Retail Hierarchy Plan**

Key

--- Kingston borough boundary



Metropolitan centres



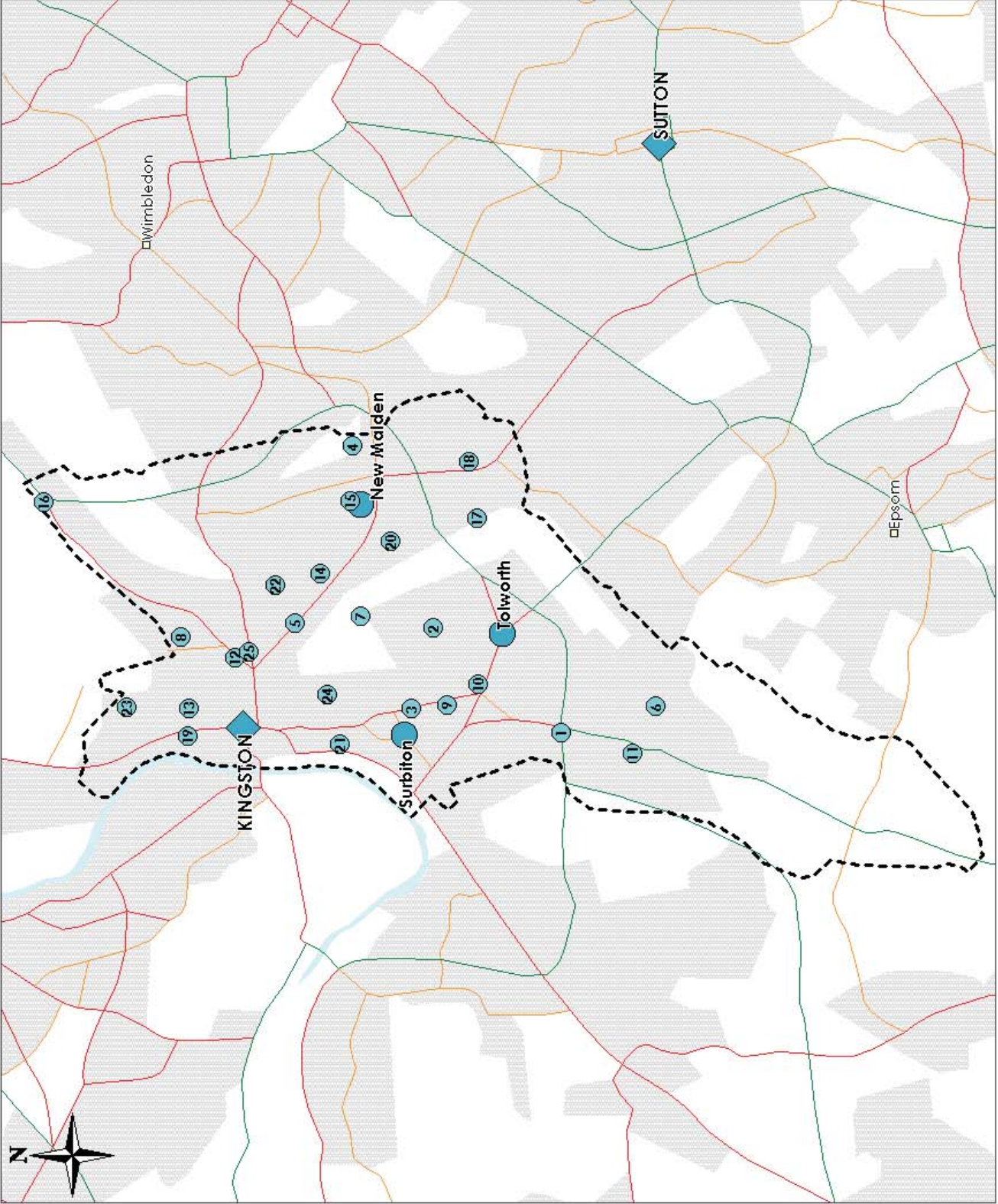
District centres



Local centres

- 1 Ace of Spades
- 2 Alexandra Drive
- 3 Berrylands Road
- 4 Burlington Road
- 5 Cambridge Road
- 6 Chessington North Parade
- 7 Chiffers Drive
- 8 Crescent Road
- 9 Ewell Road North
- 10 Ewell Road South
- 11 Hook Parade/Elm Road
- 12 Kingston Hill/Park Road
- 13 Kings Road
- 14 Kingston Road West
- 15 Kingston Road East
- 16 Kingston Vale
- 17 Malden Manor
- 18 Plough Green
- 19 Richmond Road
- 20 South Lane
- 21 Surbiton Road
- 22 The Triangle
- 23 Tudor Drive
- 24 Villiers Avenue
- 25 Coombe Road

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**Plan 6: Royal Borough of Kingston
Foodstore Provision Plan**

Key

--- Kingston borough boundary

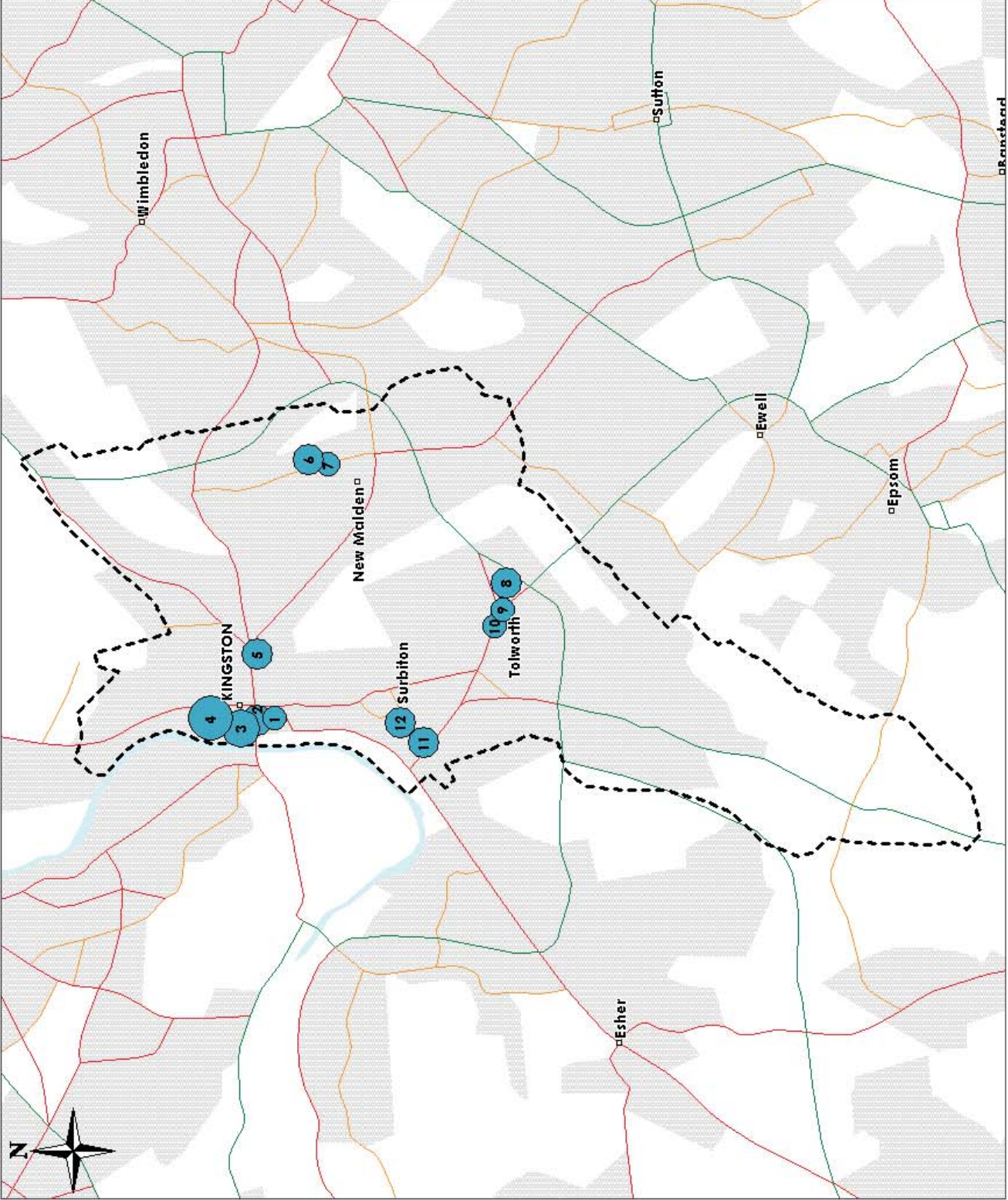
Size (total net floorspace)

- 500 - 1000 sq m
- 1000 - 2000 sq m
- 2000 - 3000 sq m
- > 3,000 sq m

Foodstore

- 1 Sainsbury's, Eden Walk, Kingston
- 2 Marks & Spencer, Clarence St, Kingston
- 3 Waitrose, Wood St, Kingston
- 4 Sainsbury's, Sury Basin, Kingston
- 5 Asda, London Rd, Kingston
- 6 Waitrose, New Maldon
- 7 Co-op, New Maldon
- 8 Marks & Spencer, Tolworth
- 9 Iceland, Tolworth
- 10 Budgens, Tolworth
- 11 Sainsbury's, Surbiton
- 12 Waitrose, Surbiton

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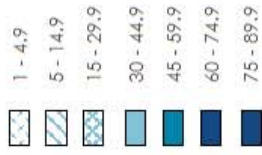




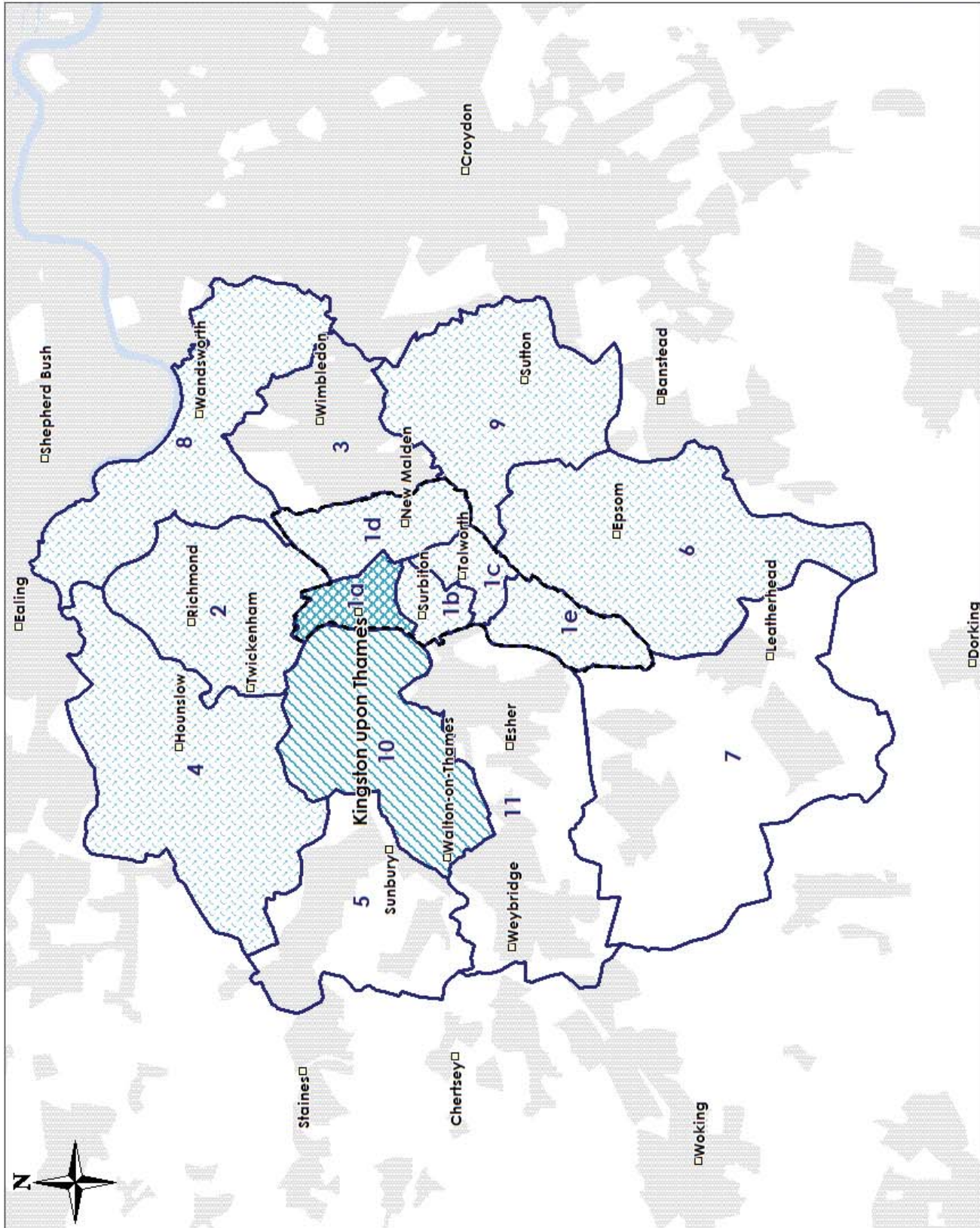
**Plan 7a: Kingston In Centre
Convenience Goods
Market Share**

Key
 - - - Kingston borough boundary

Convenience Goods
Market Share (%)

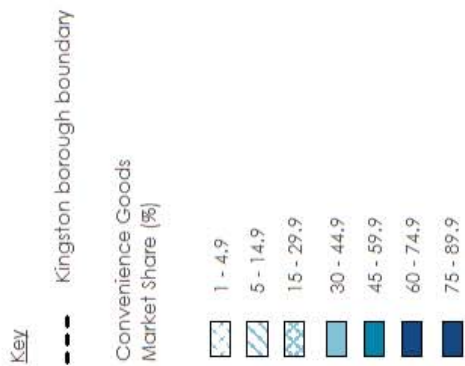


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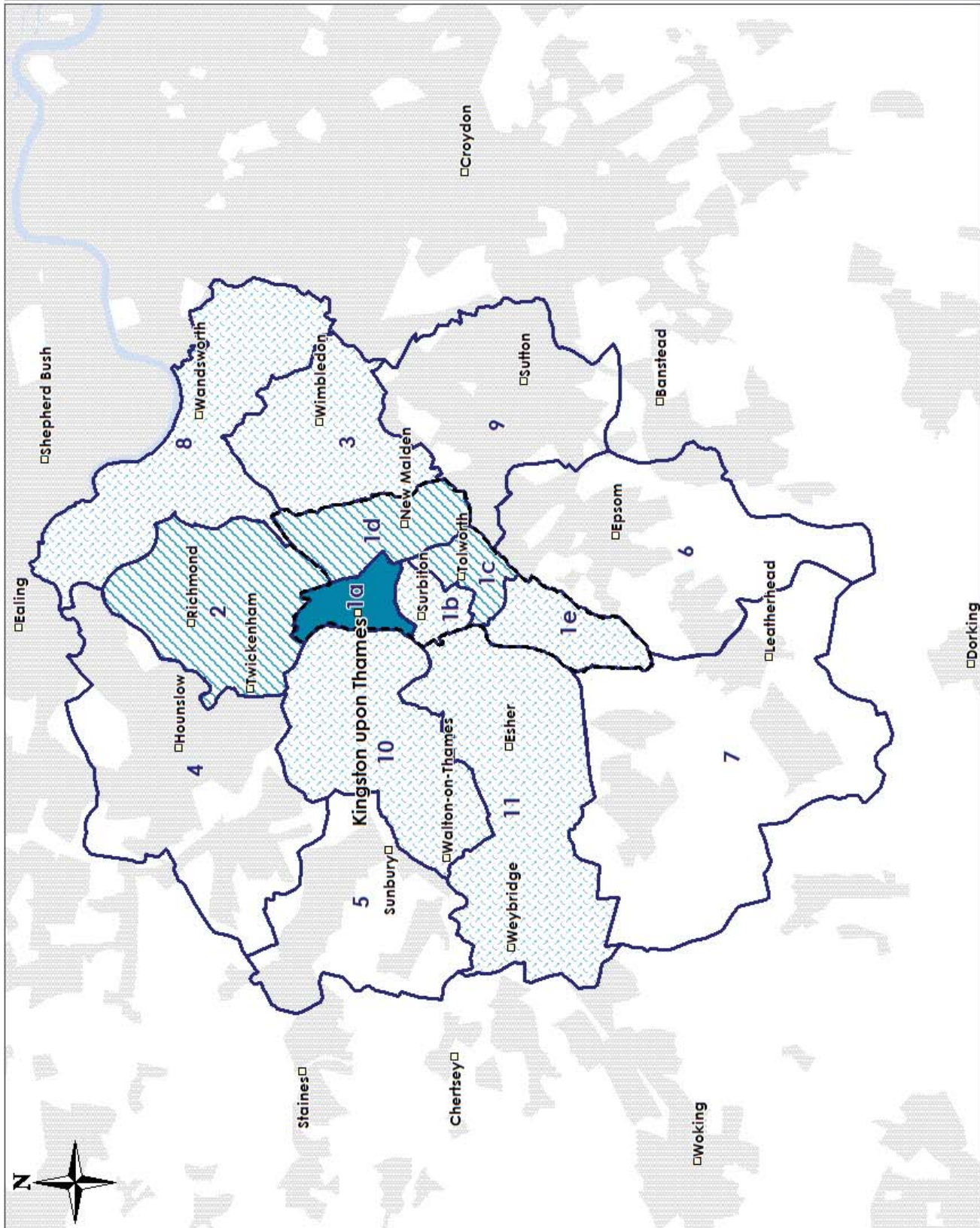




Plan 7b: Kingston Edge and Out of Centre Convenience Goods Market Share



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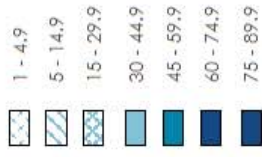
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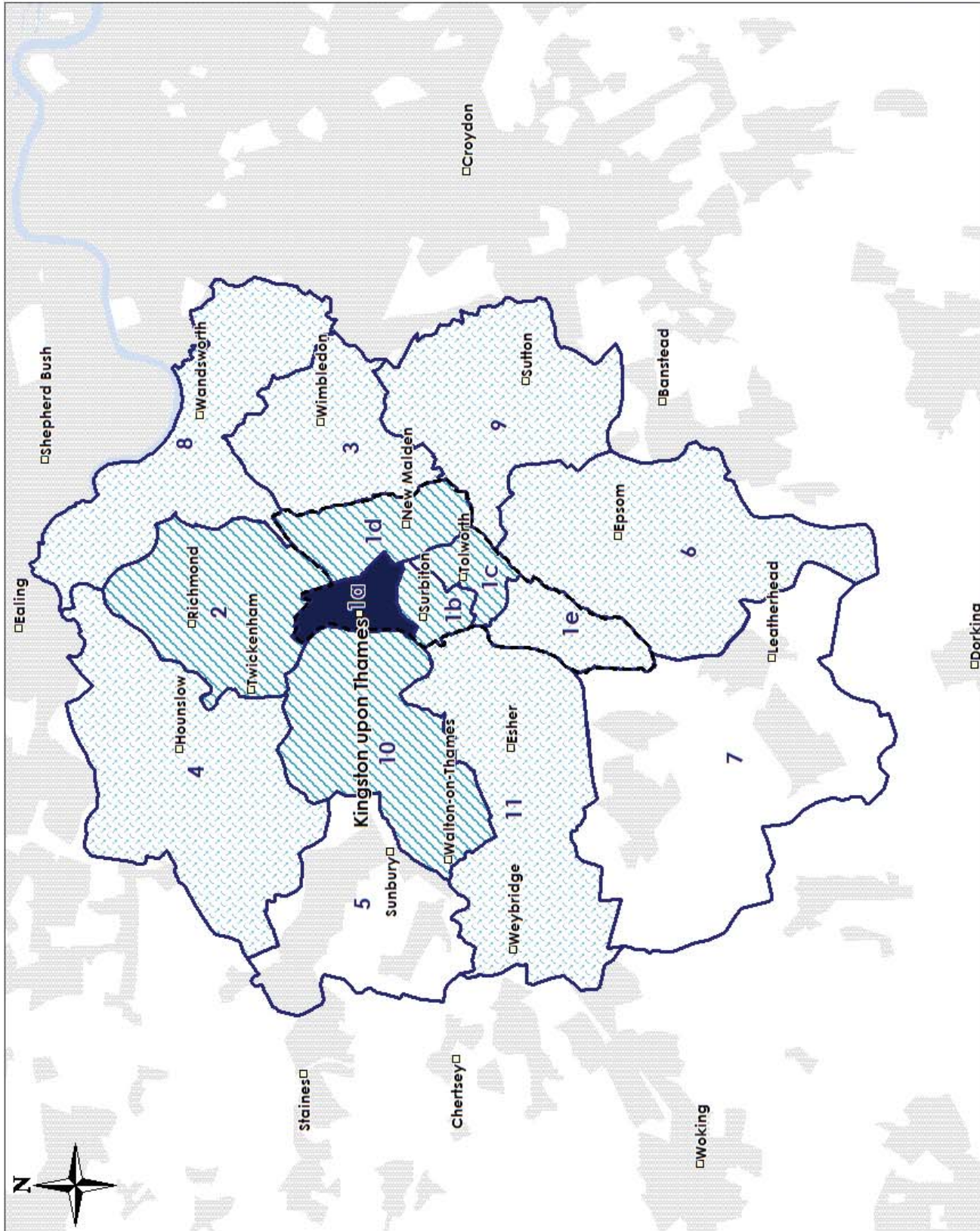
**Plan 7c: Kingston
Convenience Goods
Market Share**

Key
 - - - Kingston borough boundary

Convenience Goods
Market Share (%)



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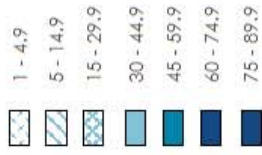




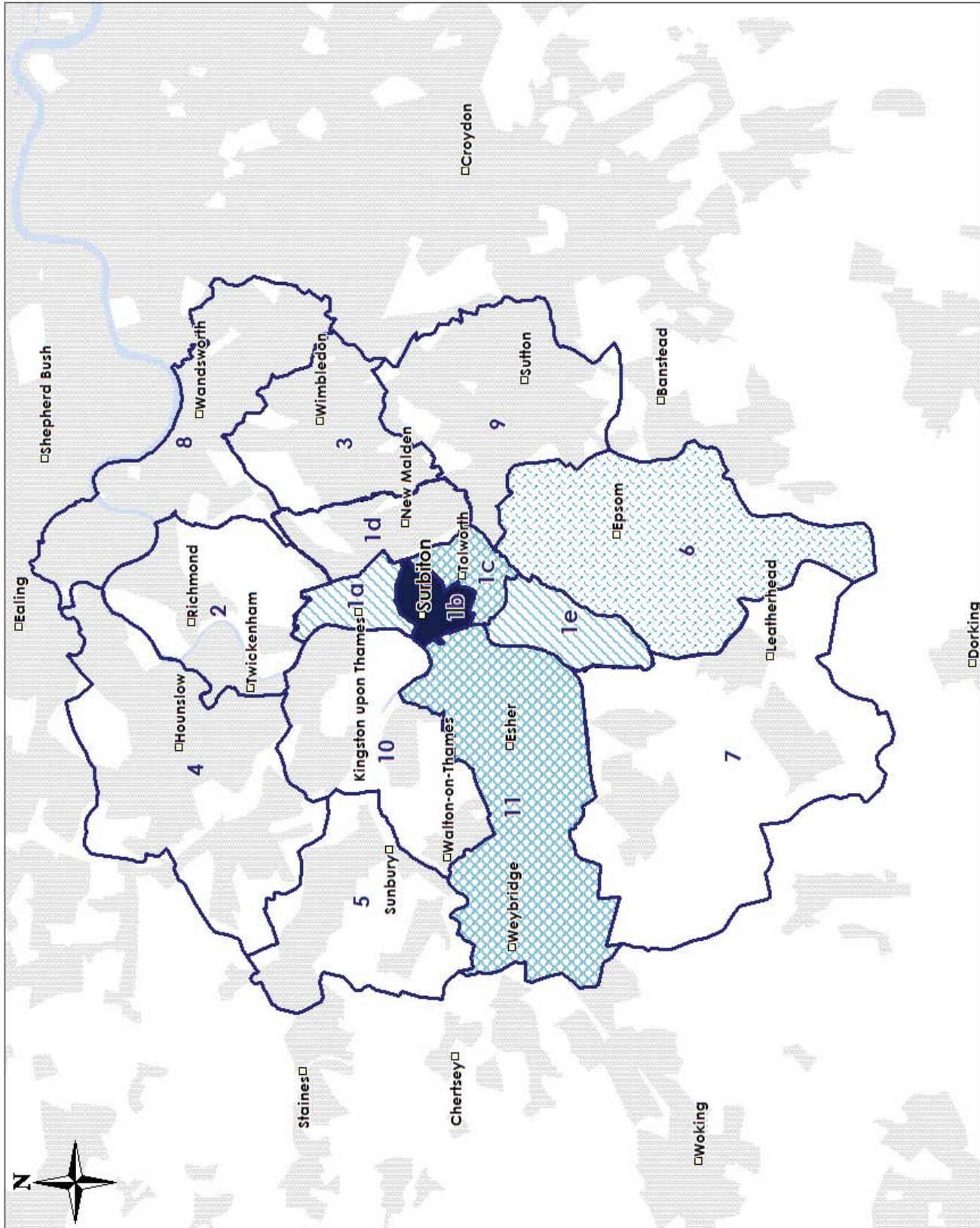
Plan 7d: Surbiton In Centre Convenience Goods Market Share Plan

Key
--- Kingston borough boundary

Convenience Goods Market Share (%)



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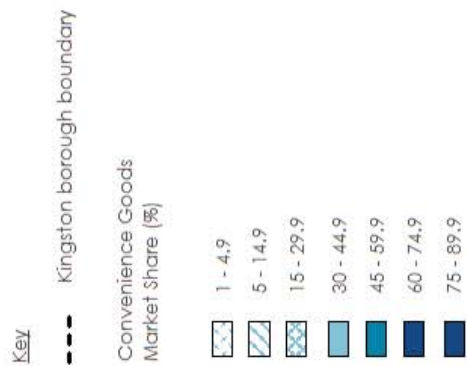


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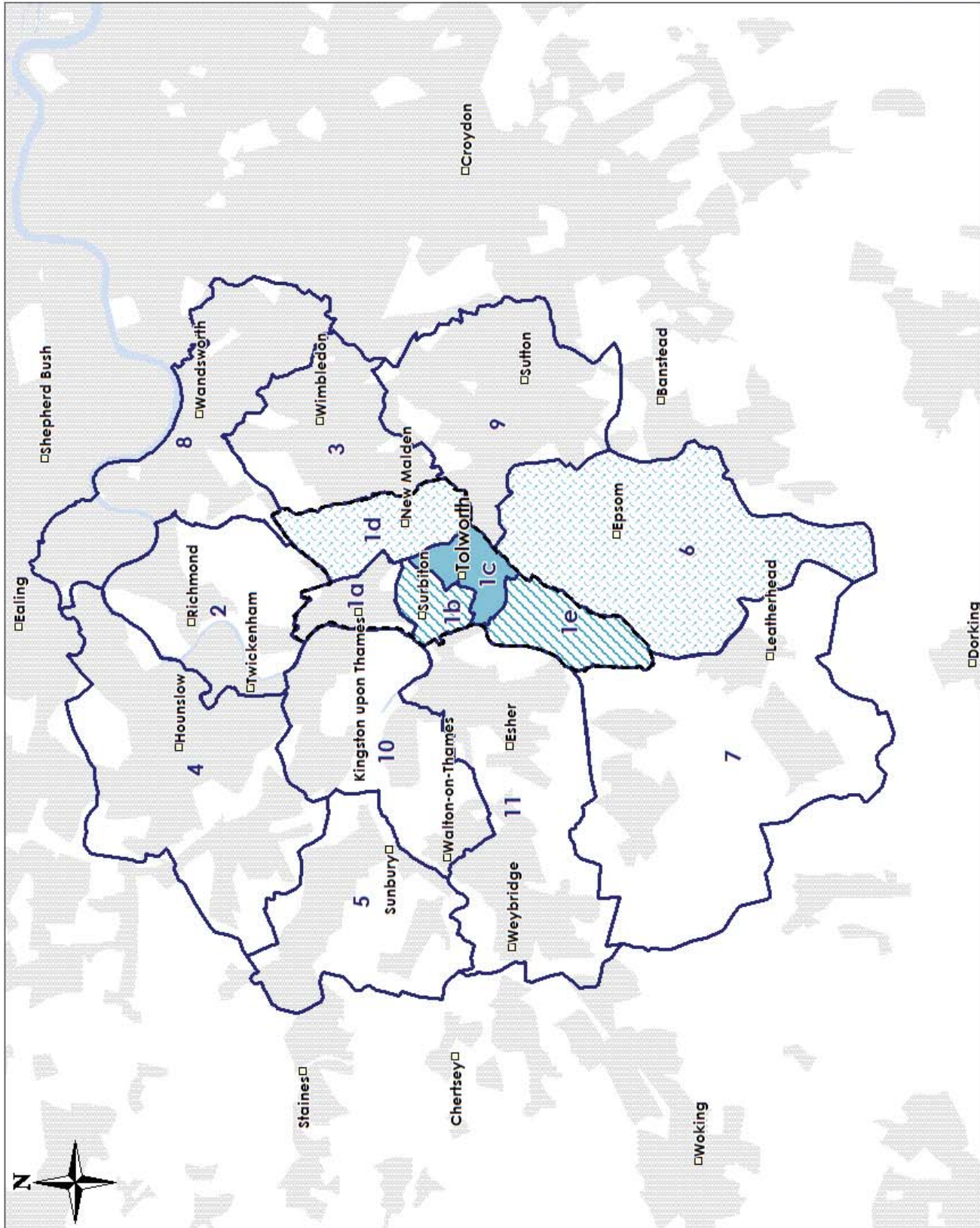
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**Plan 7e: Tolworth In Centre
Convenience Goods Market
Share Plan**



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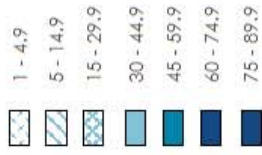




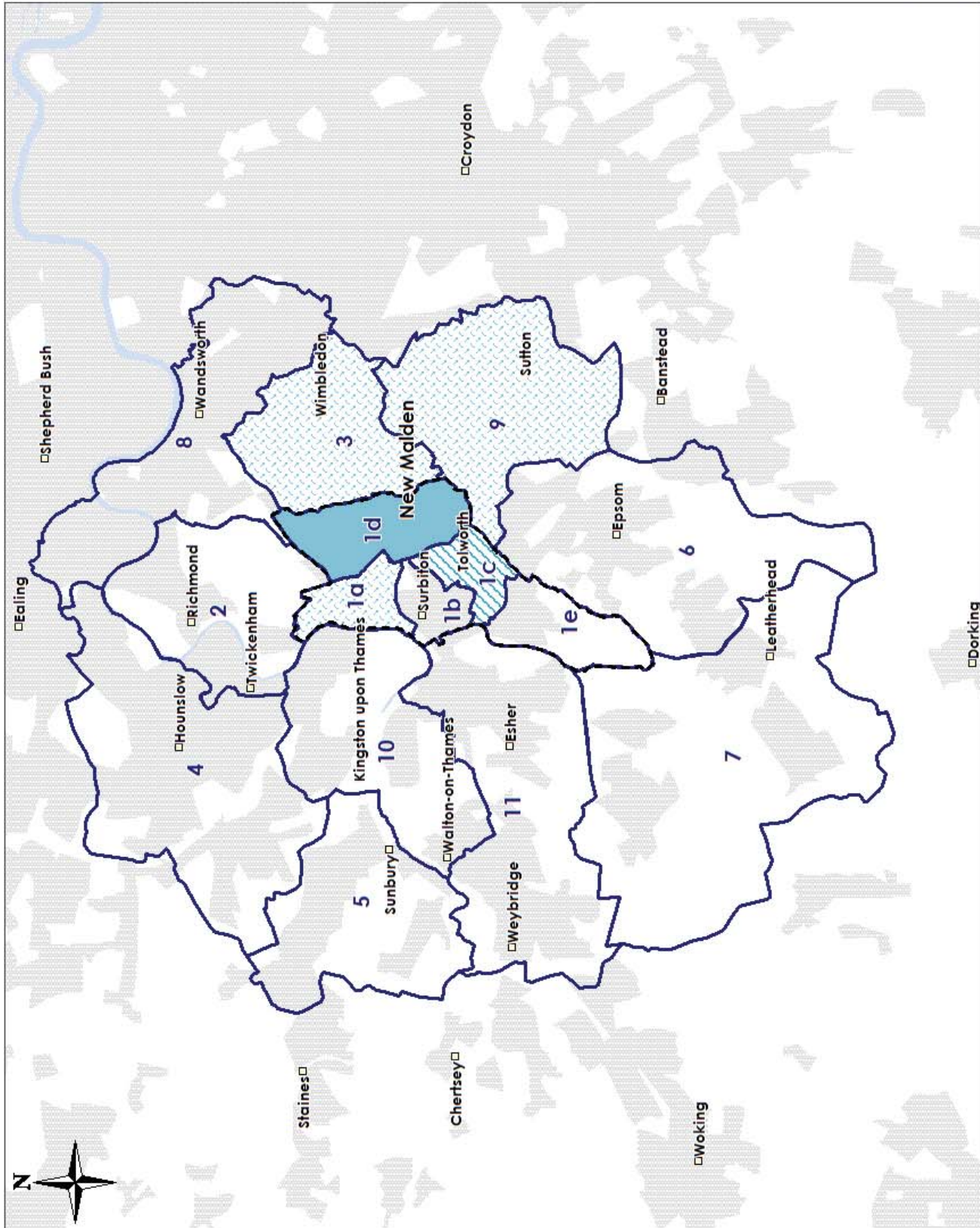
Plan 7f: New Malden In Centre Convenience Goods Market Share Plan

Key
--- Kingston borough boundary

Convenience Goods Market Share (%)



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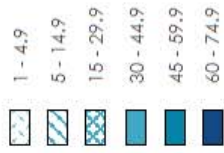




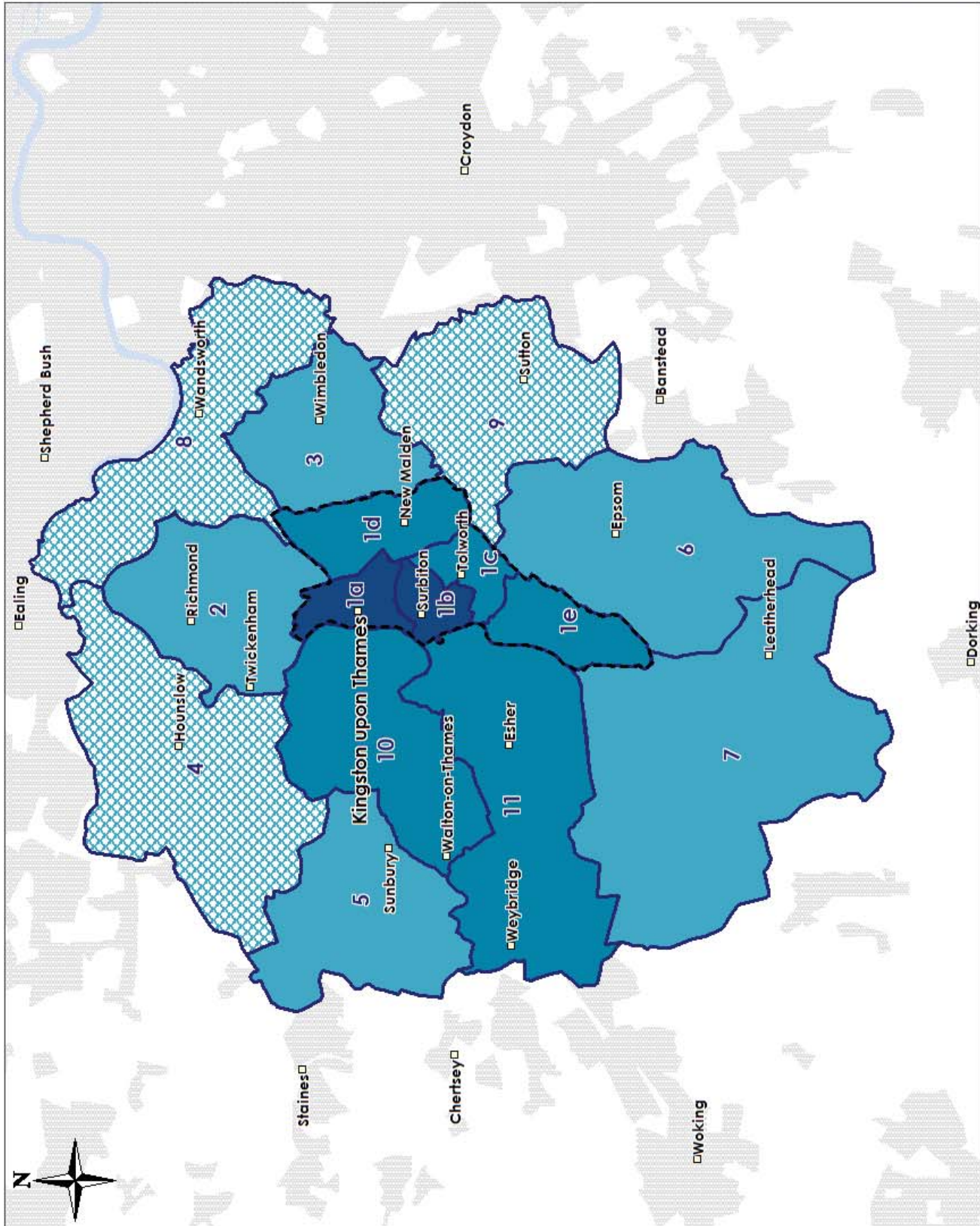
Plan 8a: Kingston Town Centre Comparison Goods Market Share Plan

Key
--- Kingston borough boundary

Comparison Goods Market Share (%)



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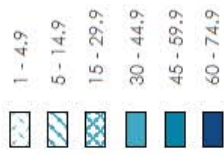




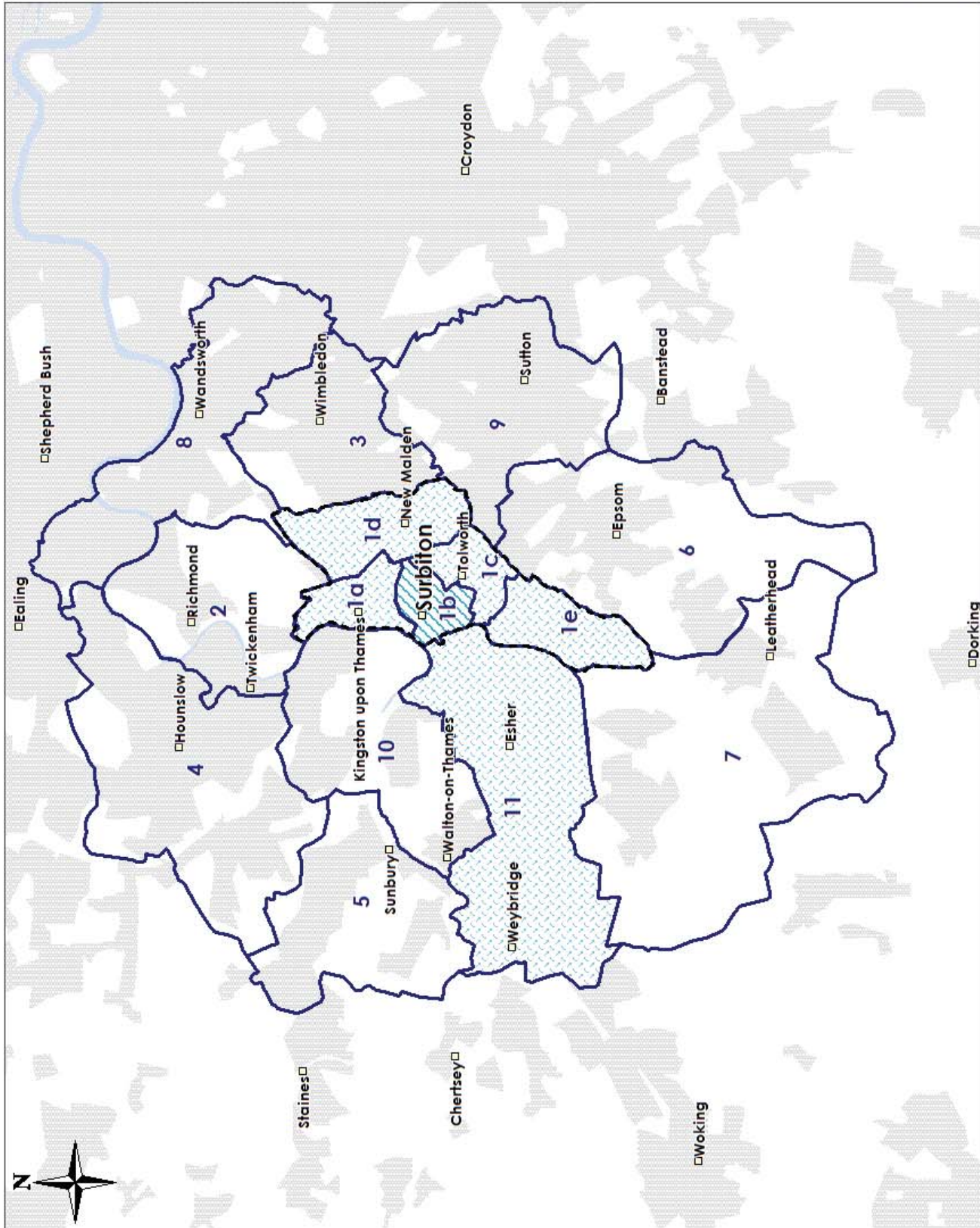
**Plan 8b: Surbiton District
Centre Comparison Goods
Market Share Plan**

Key
 - - - Kingston borough boundary

Comparison Goods
Market Share (%)



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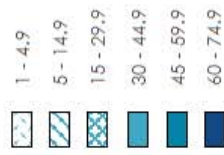




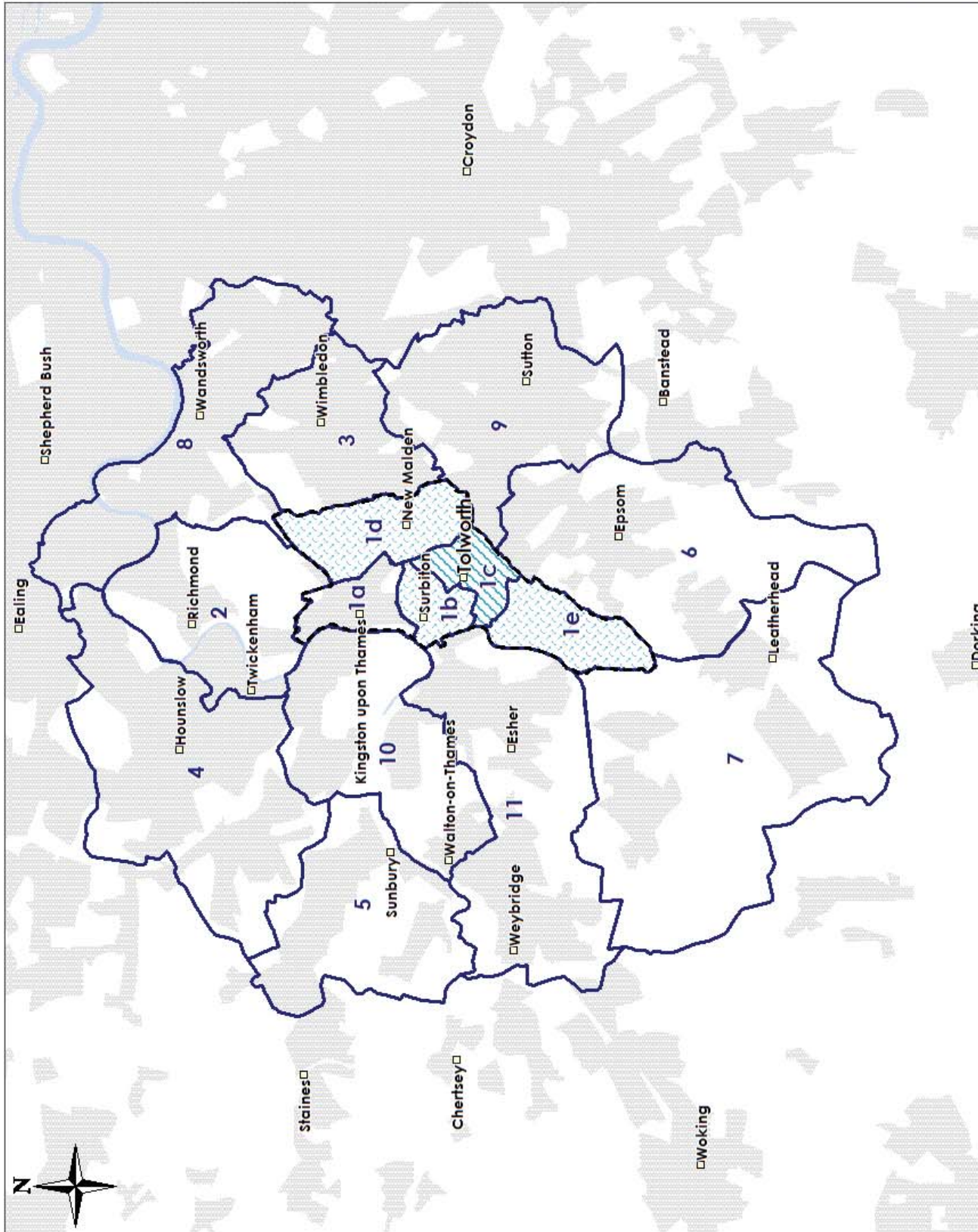
**Plan 8c: Tolworth District
Centre Comparison Goods
Market Share Plan**

Key
 - - - Kingston borough boundary

Comparison Goods
Market Share (%)



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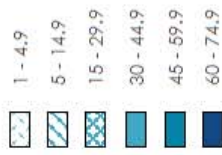
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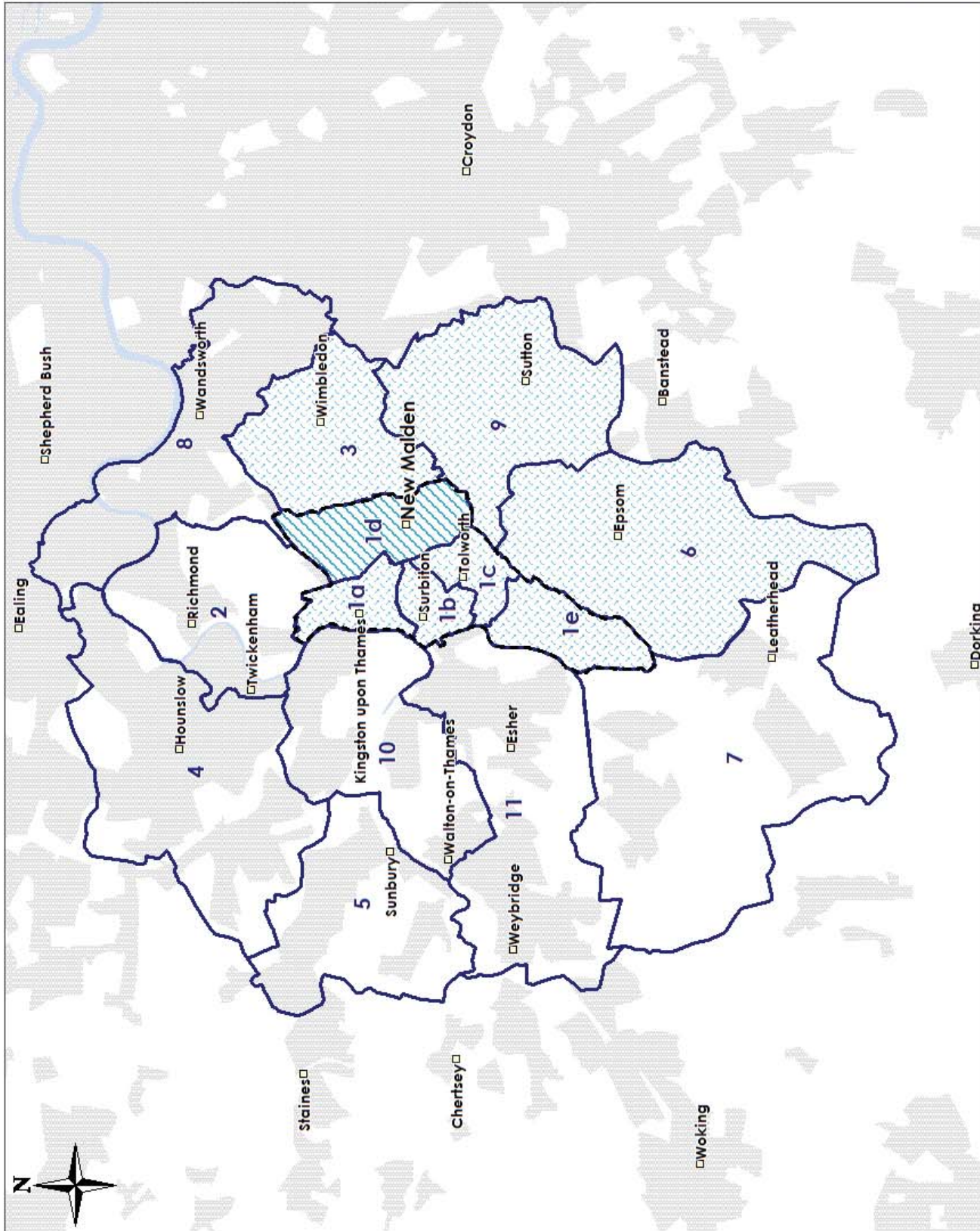
Plan 8d: New Malden District Centre Comparison Goods Market Share Plan

Key
--- Kingston borough boundary

Comparison Goods
Market Share (%)



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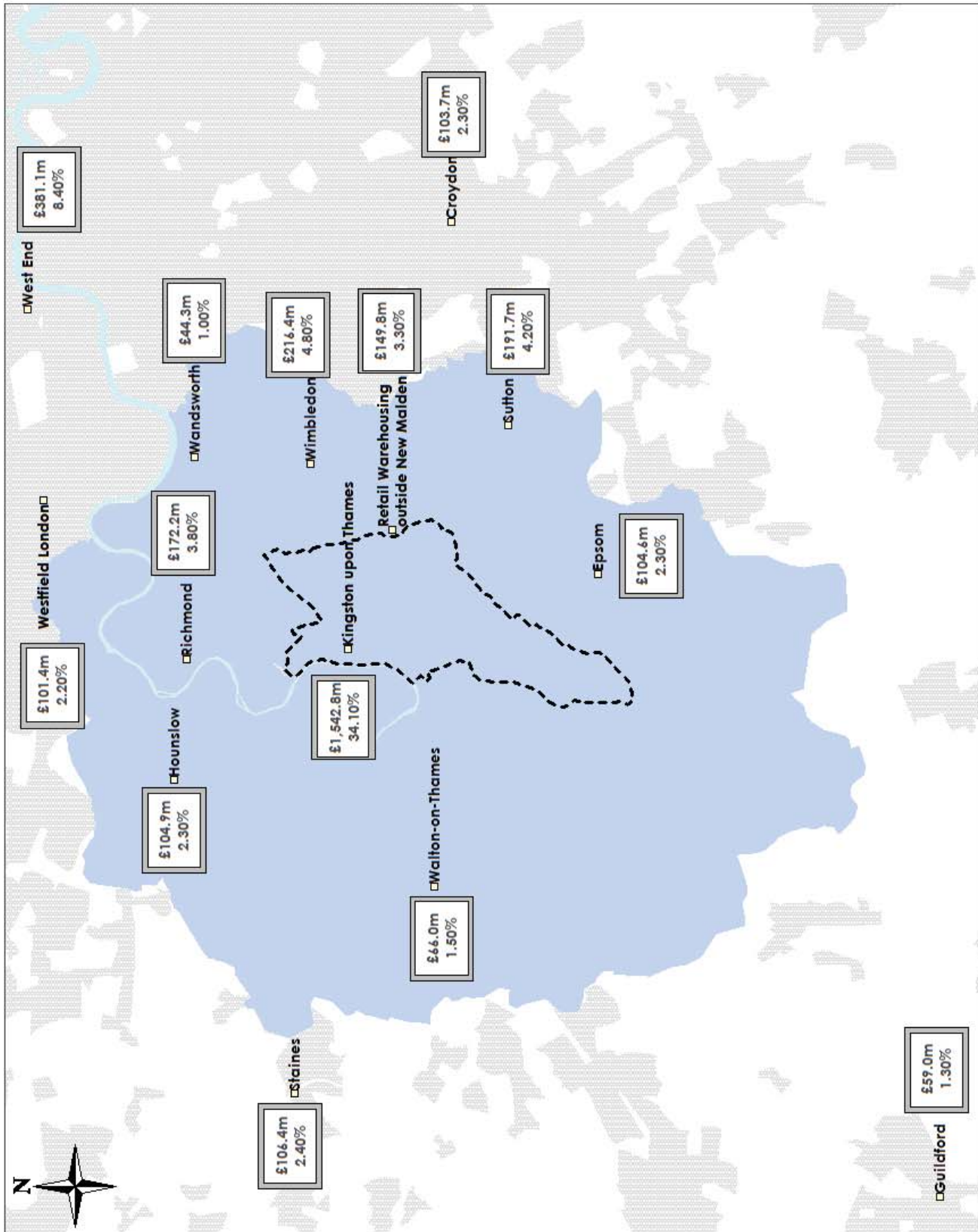
Plan 9: Comparison Goods Expenditure Leakage Plan

Key

--- Kingston borough boundary

■ study area

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