



XXXXXXXXXXXXXXXXXXXX
WE MADE THAT
XXXXXXXXXXXXXXXXXXXX

Maddison Graphic **Stockdale**

REIMAGINING KINGSTON TOWN CENTRE PUBLIC REALM STRATEGY
SOCIAL VALUE AUDIT | REV B 19-07-2019

CONTENTS

1.0 Introduction p3

Methodology

2.0 Kingston Town Centre & wider context p4

3.0 Town Centre User Survey p8

User survey locations
Profile of town centre users
Use of town centre
Valuing the town centre
Participation
Perception of change

4.0 Town Centre Business Survey p15

Business survey locations
Business profile
Economic value
Social value
Perception of change
Improvements that would like to be seen in the town centre
Evening and night-time economy and activation

5.0 Key findings p28

People
Place
Prosperity

6.0 Kingston's Social Value Drivers p30

Current strengths
How Kingston could do better

Revisions tracker

Rev.	Date	Description
-	15-02-2019	Draft issue to client team
A	15-05-2019	Issue to client team
B	19-07-2019	Issue to client team

Methodology

The methodology developed for the purpose of this study is based on previous work and experience undertaken by We Made That and LSE in 2017 for the GLA: 'High Streets for All' study, which was the first social value study of London's high streets. The working methods have been adapted and refined to be applicable to Kingston Town Centre - as compared to single streets that were the focus in 'High Streets for All.'

The driving research questions that this study responds to are:

- What is the socio-economic value of Kingston Town Centre?
- What changes is Kingston Town Centre currently facing, and how are these perceived by the people who use them?
- How can the town centre and its regeneration be more inclusive and benefit all people living, working and visiting Kingston?

Through a combination of primary research with traders, town centre visitors and other stakeholders, as well as observational analysis of the town centre, this methodology works to analyse the town centre as a complex part of Kingston. Four core aspects of the town centre have been explored, including but not limited to: primary use of the town centre, measures of value, local participation, and measures of change.

The working assumptions on which this methodology is developed is that the town centre is an urban feature where it is not tenable to separate out the economic and cultural, the social and the material, as separate processes or categories of analysis. As such this methodology locates analysis outside of the conventional models and measures of the economy, for example, the narrow confines of 'retail viability' and 'town centre planning'. In exploring the civic life of the town centre, this study is particularly interested in how change – both everyday and extraordinary – is experienced and mediated on and through the town centre.

Baseline understanding

This study is grounded in new primary research

focused on gathering information 'from the ground', by the people who use or work in the town centre.

The objective of this primary research is to explore intersections between social diversity, economic integration and the impact of change; how accelerated movement of people, investment and infrastructure alters everyday urban landscapes in Kingston. This work approaches the town centre as more than a place of exchanging goods and services, but as critical space for information and care, as a physical but also social infrastructure. Beyond this new primary research the study also makes use of findings gathered through previous studies, such as 'High Streets for All', which took other existing and forthcoming data from the GLA Regeneration, Intelligence and London Plan teams into account. This approach allows for the best balance of detailed, evidenced based understanding and newly collected primary data.

'On the ground' surveys

A process of 'on the ground' surveys provided an entry point into the town centre by way of a qualitative face-to-face interviews with businesses, as well as surveys with town centre 'users' (typically visitors or residents local to the town centre). For the business surveys, a selection of units within four different sub-areas in the town centre were spatially recorded, and willing proprietors or employees interviewed. Respondents - 55 in total - were posed questions around:

- work practices (retail activities, number of employees, use of media);
- connections to, and use of the town centre (duration, forms of tenure, proximity to home);
- connections beyond the town centre (country of birth, languages spoken, use of global and local markets).

In many instances interviews lasted a matter of minutes, but often predetermined questions opened out into more spontaneous conversations coupled with periods of observation.

This methodology, used to gather primary data from proprietors and employees, expands on the methodology used in 'High Streets for All'. The number of business interviews per sub-area relates to their difference in area. This ensures that the survey results are comparable.

In parallel to these street surveys with proprietors and employees, a series of qualitative surveys were conducted with town centre 'users'. User interviews gathered detailed qualitative information on how and why people use Kingston Town Centre, to match the level of information gathered through the proprietor/employee surveys. User surveys - 60 in total - were conducted in proximity to three types of locations as identified by the street surveys, 1) community uses, 2) semi-public uses, 3) economic uses. The approach was to target specifically those places which were known to perform important social functions, and are host to a range of socialising beyond the retail. Researchers approached passers by to participate in the survey.

A clear methodological question was how we could utilise our cross-disciplinary skills to comprehend the social and economic value of the town centre within the everyday inhabitation.

Lines of questioning for user interviews included:

- What do you use the town centre for?
- Why do you visit this town centre in particular? What are your other options besides this town centre, and why is this town centre preferable?
- How regularly do you visit the town centre?
- Do you know any people working in the town centre?
- Do you think change in the area has affected the town centre?
- How does the town centre help you?

These prompts, informed by the key themes identified in the study 'High Streets for All', cover aspects of everyday social, economic and spatial experiences of the town centre from a multitude of different users. This stream of more public-facing engagement captures a range of particular experiences and

perceptions of Kingston Town Centre through primary research, particular those of visitors and local residents, providing a valuable stream of first-hand qualitative evidence.

Analysis & mapping

Following these streams of engagement, observation and interrogation in the town centre, a process of evidence analysis and mapping developed a range of findings across the themes focused upon people, place and prosperity. In total, the surveys gathered insights from 115 people, producing an evidence base for a range of both quantitative and qualitative findings.

Evaluation analysis

Building on the new primary evidence of social value as evidenced in Kingston Town Centre, this work goes on to consider how the town centre performs against identified social value drivers. Current strengths are identified, as well as opportunities for improvements.

Benchmark cases

The High Street for All study presents three case studies of London high streets where the same survey and methodology has been carried out. Those high streets are Lewisham, Burnt Oak and Lower Clapton. They will be used as comparative cases throughout the analysis, in order to better interpret, analyse and situate Kingston in the social, economic and demographic context of London.

2.0 KINGSTON TOWN CENTRE PROFILE

Town centre designation

The following maps present a set of indicators of changes that have been developed for the High Street for All study which situate Kingston Town Centre in relation to London's other town centres. These indicators were considered to cover a range of economic, social and physical changes. In the context of this study, they are useful to better understand how Kingston Town Centre compares and contrasts to other high streets and town centres, and in particular to the ones explored in the 'High Streets for All' study (Burnt Oak, Lewisham and Lower Clapton) as they will serve as comparative cases throughout the present analysis.

Kingston Town Centre is designated as a 'Metropolitan Centre' suggesting its importance in terms of size, economic activities and reach.

Lewisham is designated as a 'Major' Town Centre while Burnt Oak and Lower Clapton are not designated in the London Plan, suggesting a more local reach.

KEY

- International
- Metropolitan
- Major
- District
- None



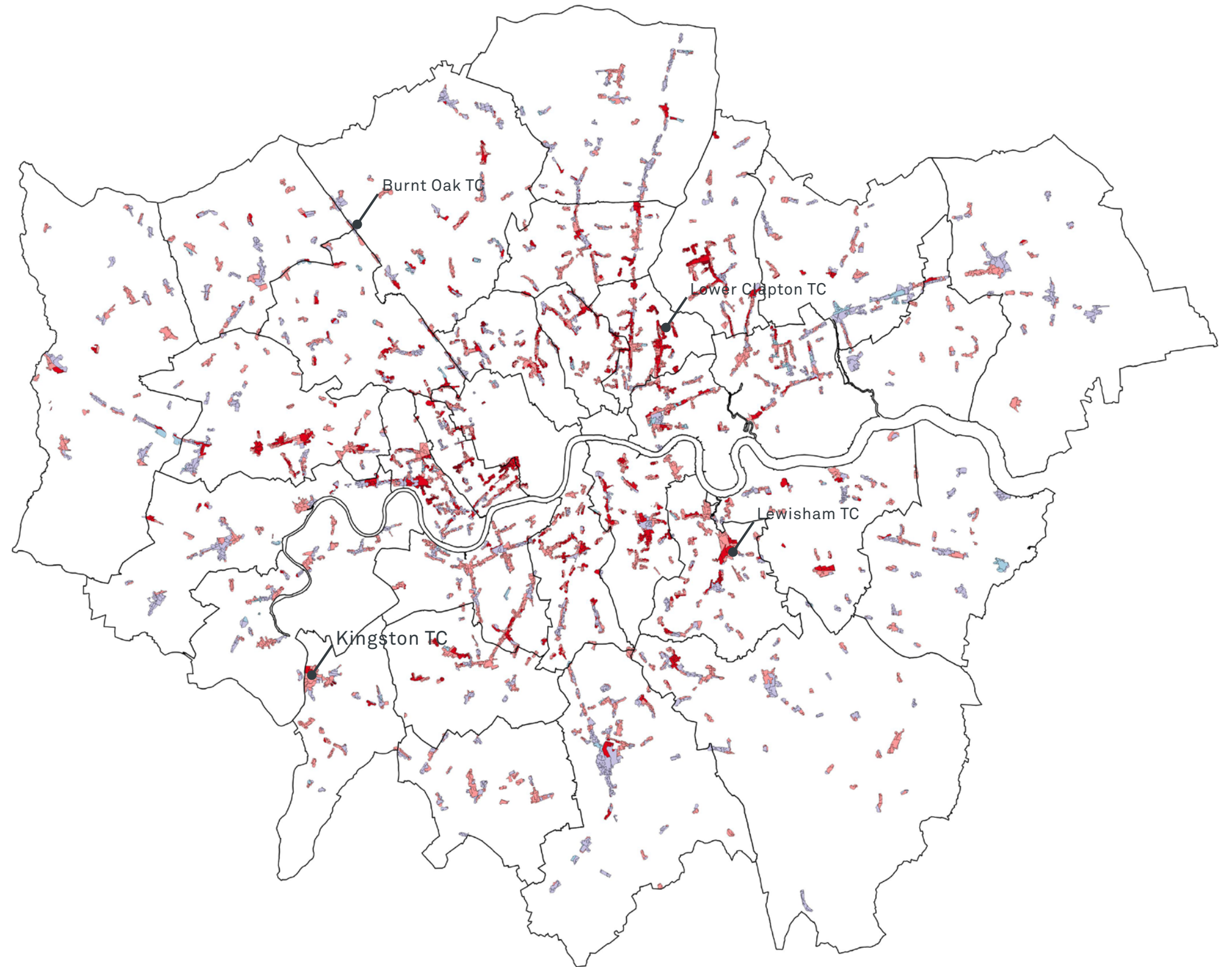
2.0 KINGSTON TOWN CENTRE & WIDER CONTEXT

House price changes

Intersecting localised (LSOA-level) median house price evolution (2008-2015) with London's high streets allows to situate Kingston Town Centre in relation to other town centres with regards to experiences of changing affordability. The mapping identifies house price 'hotspots' where the local area around particular high streets has experienced significant price increase that could help better understand and interpret the social value audit findings.

The north-western part of Kingston Town Centre, around the station, has experienced a house price increase of over 200 per cent since 2008. This stands well above the average localised house price change of 66 per cent around London's high streets. In the rest of the town centre, the house price change is situated within the average of London's high streets, but overall above the average localised house price change of London's Outer Boroughs.

In comparison to the three benchmark cases, Kingston Town Centre is experiencing an increase of property value more moderate than in Lower Clapton, more important than in Burnt Oak and somewhat similar to what is experienced in Lewisham.



KEY

- <0 %
- 0 - 50 %
- 50 - 100 %
- 100 - 200 %
- 200+ %

2.0 KINGSTON TOWN CENTRE PROFILE

Physical change

Intersecting localised data (LSOA-level) on completed residential development over the 2008-2016 period with London's high streets allows to situate Kingston Town Centre in relation to other town centres with regards to physical changes. This indicator allows to identify locations where residential development can be assumed to have a considerable impact on the physical fabric of sites on and around particular high streets.

The indicator suggests that Kingston Town Centre has experienced a relatively moderate level of physical change recently with the completion of approximately 350 residential units in the given period which is higher than the average of all London's high streets but relatively low in comparison with other town centres of a similar importance.

In comparison to the three benchmark cases, Kingston Town Centre is experiencing less physical changes than Lewisham, which has been the site of considerable residential redevelopment and transport infrastructure upgrades since 2008, and the area around Lower Clapton stretching down across Hackney Central. Burnt Oak Town Centre has seen relatively little residential development since 2008, with areas around the high street recorded as sites where less than 50 residential units have been delivered since 2008.



KEY

- 0-50 units
- 50-100 units
- 100-500 units
- 500-1000 units
- 1000-3500 units

2.0 KINGSTON TOWN CENTRE PROFILE

Demographic change

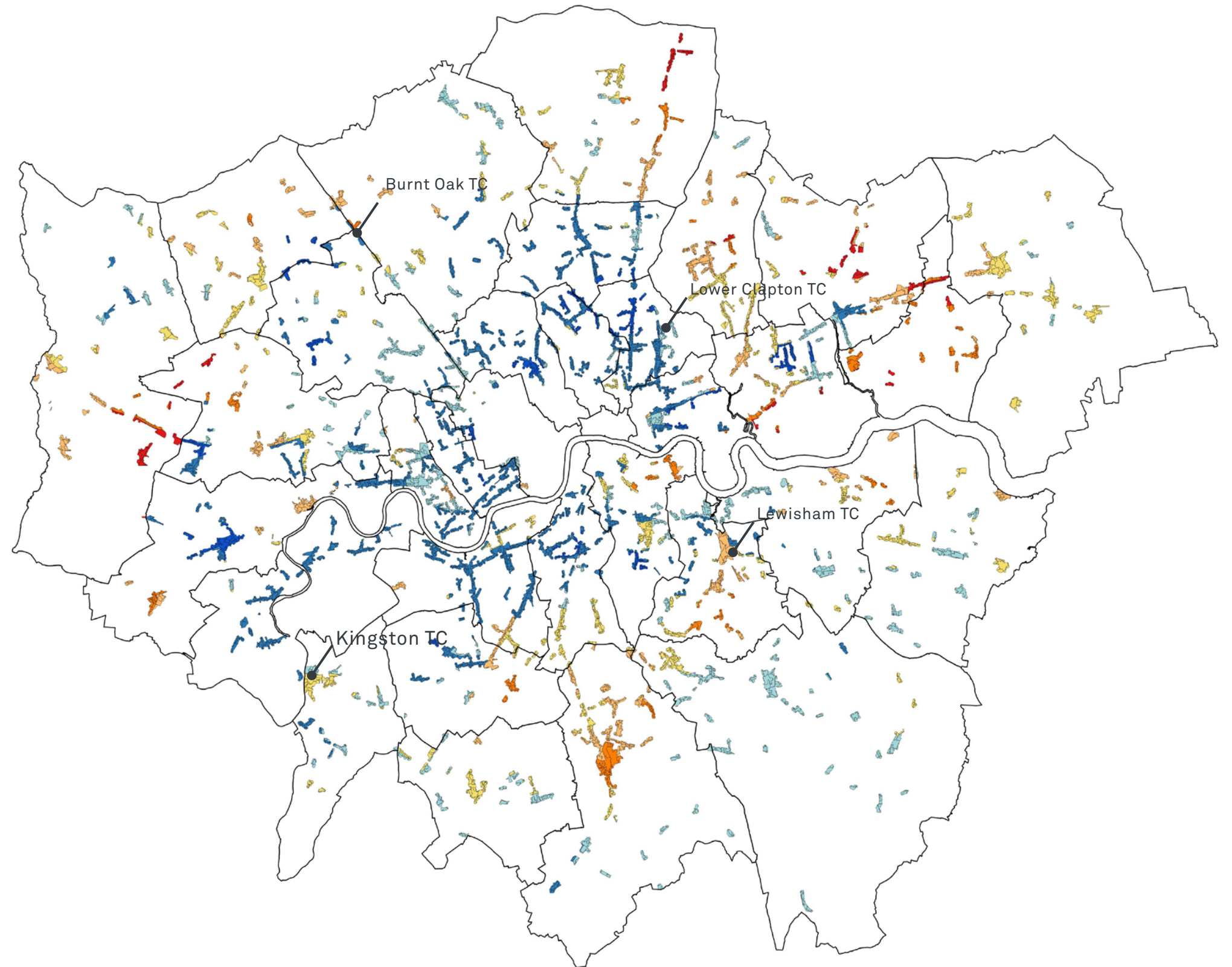
Intersecting localised census data (ward-level) on changes in relative diversity ranking based on the population estimate by ethnic group and the Simpson's Diversity Index score for 2001 and 2011 with London's high streets, situates Kingston Town Centre in relation to other town centres with regards to demographic changes. The map presents how particular neighbourhoods have become relatively less diverse while others have become relatively more diverse.

Census data shows that Kingston Town Centre has not experienced a radical demographic diversity shift over the 2001-2011 census period. The northern part of the borough, around the station, has seen a relative decrease in its demographic diversity while the rest of the town centre has become more diverse in its resident population, although this change in relative diversity is not particularly important.

In comparison to the three benchmark cases, Kingston Town Centre is experiencing less demographic change in relation to diversity. Burnt Oak Town Centre has experienced a significant diversification its population with a substantial increase of non-UK born residents, as has Lewisham in a more relative way. On the contrary, Lower Clapton has seen a distinct decrease in their demographic diversity over the 2001-2011 census period.

KEY

- < -100 ranking change (less diverse)
- -100- -30 ranking change
- -30-0 ranking change
- 0-30 ranking change
- 30-100 ranking change
- 100-150 ranking change
- >150 ranking change (more diverse)



3.0 TOWN CENTRE USER SURVEY

User survey locations

The results presented in this section are focused primarily with those who visit and engage with Kingston Town centre as 'users'. Findings are drawn from the 61 surveys conducted in the town centre and are organised around how people use the town centre, what people value on the town centre and how people formally and informally participated within their local community.

The surveys were conducted at three different locations as listed below, during two different time periods: 10am - 12pm and 3 - 5pm. 10 responses were captured at every location per time period.

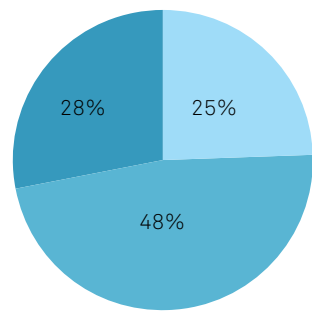
1. The Rotunda (contains leisure uses including cinema)
2. Kingston Library / Leisure Centre / Museum
3. Post Office / Boots / Citizens Advice Bureau on Eden Street/Union Street



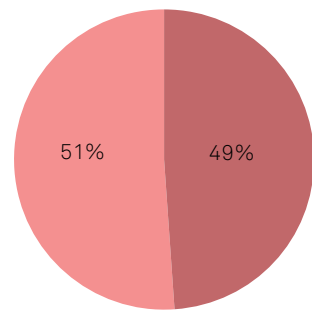
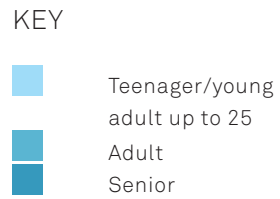
3.0 TOWN CENTRE USER SURVEY

Town centre users

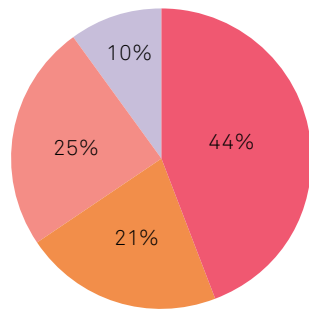
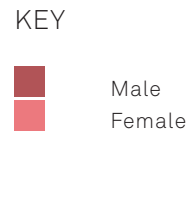
User profiles highlight the efficacy of the town centre in appealing to people across ages, genders and employment status.



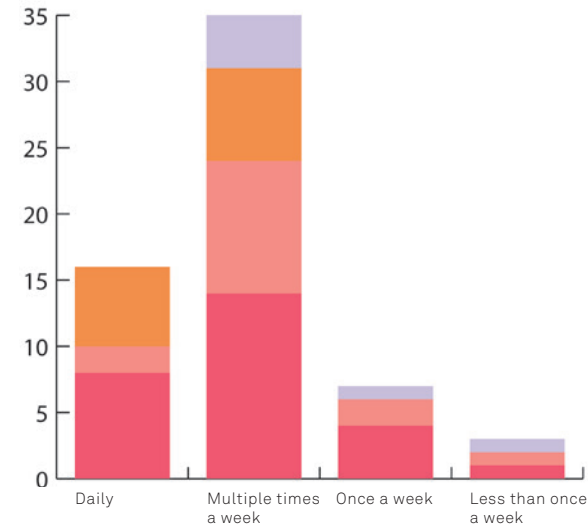
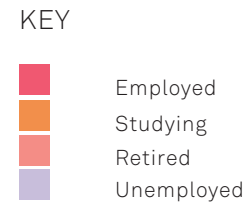
Age of surveyed town centre users



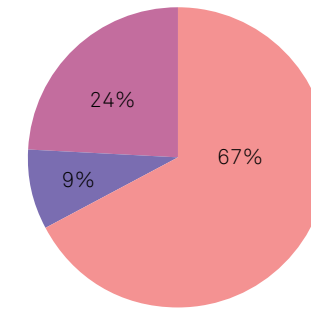
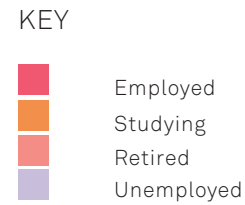
Gender of surveyed town centre users



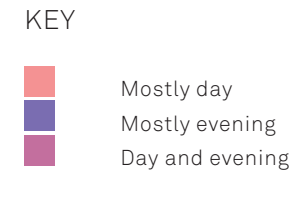
Employment status of town centre users



Frequency of visit compared to employment status of town centre users



Time of day of visiting the town centre



Age and gender is represented fairly in the user survey. Out of the 60 people surveyed, nearly half were adults, just over one quarter seniors and the remaining quarter teenagers to young adults. Almost half of the people surveyed were male and just over half were female.

The majority of surveyed town centre users are currently in employment. Unemployed town centre users made up a minority at only 10%. The representation of students and retirees is comparable.

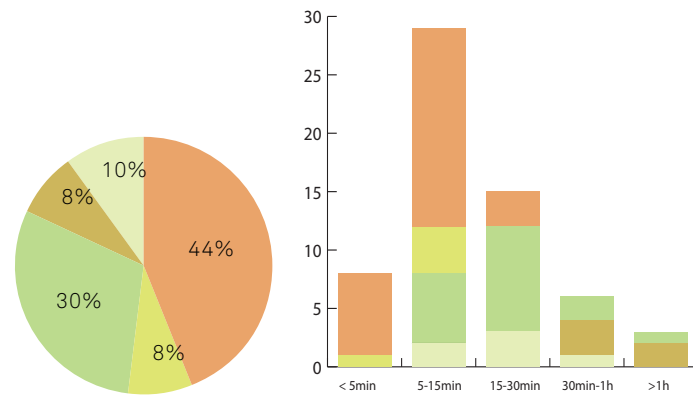
The majority of town centre users visit multiple times a week. Students visit daily or multiple times a week, due to the close proximity of the town centre to the university.

Most of the surveyed users visit the town centre during the day. A quarter of the surveyed users visit both during the day as well as in the evening.

3.0

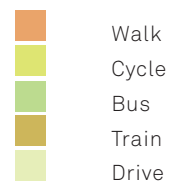
TOWN CENTRE USER SURVEY

Town centre users



How do town centre users travel here and how long does it take them

KEY



A majority of the users surveyed walk or cycle to the town centre (52%). Additionally, a large proportion of respondents live a short distance from the town centre, with approximately 60% of journeys from home taking 15min or less. This accessibility profile underscores how easy it is to reach the town centre for many users. This accessibility is closely linked to inclusivity, especially in relation to those with limited or impaired mobility, and highlights the crucial role that the town centre has in enabling people to walk within the neighbourhoods in which they live. Typically, the range of activities and services close to home in the town centre offer regular opportunity and cause for people to visit, especially by walking.

The relatively low level of people using cars to access the town centre also suggests effective local transport routes.

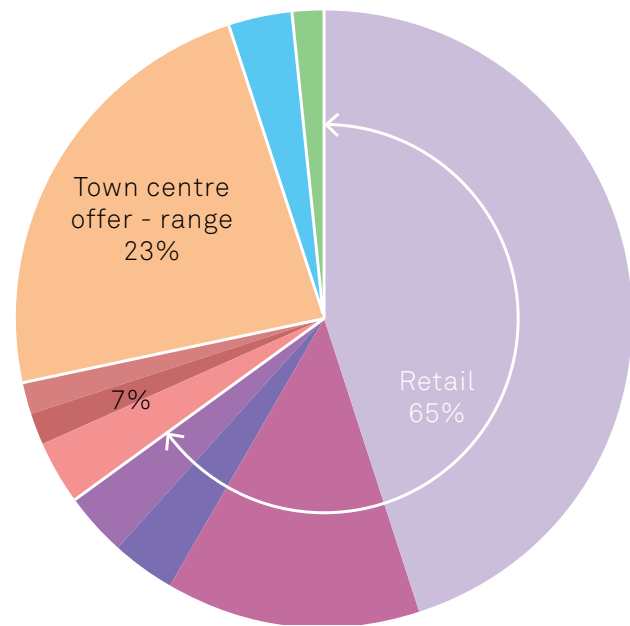
In comparison to the three benchmark cases from the High Street for All Study, Kingston Town Centre has the biggest catchment area for users. Half of the users are walking to the town centre suggesting a high proportion of them living locally. However, the average travel time is longer for Kingston's users than for the other high streets' users. On average, it takes 20min to reach the town centre while it takes 10 to 14 minutes for the users of Lower Clapton, Lewisham and Burnt Oak. Firstly, this suggests that the town centre offer is worth travelling for: the presence of Kingston University and the variety of the retail offer that makes the town centre a prime shopping destination are two key assets that can explain longer travel times. Secondly, Kingston Town Centre, as its 'Metropolitan Town Centre' designation implies, is one of the better connected and largest town centres in south-west London and therefore is one of the transport and economic hub of the area.

Richmond, Surbiton, Wimbledon, New Malden and Central London are amongst other town centres that people visit. Reasons for visiting other town centres were stated as the art, culture, and evening activity offer in Central London, more independent shops in Surbiton, and a more relaxing atmosphere in Richmond. At the same time, the variety and range of offer in Kingston is seen as a positive compared to Richmond or Wimbledon.

3.0

TOWN CENTRE USER SURVEY

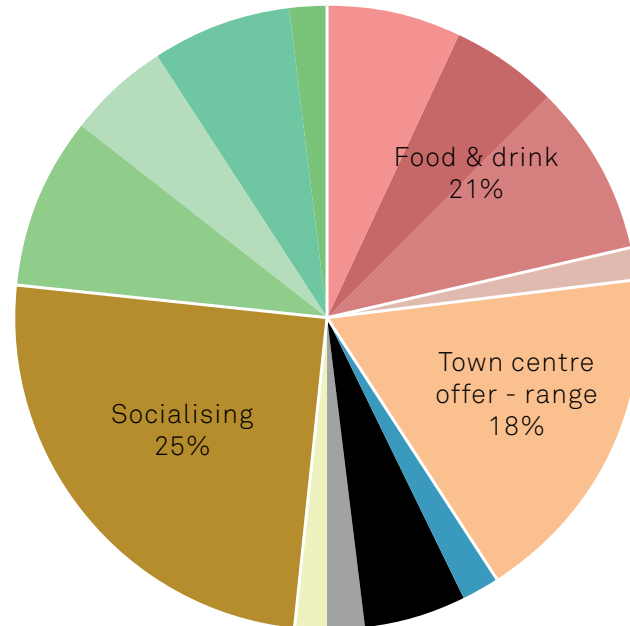
Use of the town centre



Primary use of town centre

In order to capture key features attracting users to the town centre, respondents were asked to identify what they use the town centre for. Responses were captured as a list of 'primary' use functions. Respondents were then prompted further to list all other ways in which they use the high street - what "else" they used the street for. This distinction between 'primary' and 'other' uses allows to capture both the most frequently used high street features and the wide range of ways in which people use the high street.

Retail remains a very significant part of why people use the town centre and the importance of the retail trade offer is highlighted. Only 35% of respondents reported non-retail only primary uses, although not identifying a particular use but the overall town centre range of offer - the ability of the area to offer a 'one stop' destination is identified as a reason for visiting the high street.



Secondary use of town centre

Aside from shopping, just one quarter of the surveyed users responded that the town centre offers them a place to meet people and socialise, followed by food and drink related activities. While the 'primary' high street use is clearly identifiable, tracking 'other' uses shows a more evenly distributed range of answers, highlighting a multiplicity of uses on the high street. Amongst 'other' uses, the most commonly identified uses across all three high streets are the compendium facilities - leisure, faith and library, and the use of the high street as a place to socialise. These uses are also notable as they relate to the social significance of the high street, both in terms of access to social and community infrastructure and in terms of opportunities for social contact. The socialising function of the town centre was most reported by seniors, whilst adults in employment reported food and drink related activities as a key use,

'Sometimes I go to the church, not for religious reasons, but to be somewhere which is quiet and calm.'

Over half of respondents visit Kingston Town Centre in particular because it's close to where they live or work. Over one quarter of people answered the question 'why do you visit this town centre in particular?' stating that they appreciated the variety of the town centre offer. However, discussions with the respondents have revealed that the response 'town centre offer' often relates to the retail trade offer and few examples of other uses have been given. This proves to be convenient for town centre users, being able to choose from a variety of shops, The types of shop are however relatively standard, little specialised and not directed to specific community groups in comparison with the three comparative cases. **The relatively standardised offer could be explained by the 'Metropolitan' status of the town centre.**

A third of the surveyed users have been visiting the town centre for more than 20 years revealing a relatively strong trend for long-standing relationships with the town centre. However, new visitors are also important as 35% of the surveyed users are visiting for less than 5 years.

Kingston Town Centre's high PTAL rating coincides with transport connectivity being perceived as a key feature, mainly by teenagers/under 25's who highlighted a key function of the town centre as a place that is well connected to other locations.

In the three other high streets, users also identified shopping as their primary use, however not to the same degree. Uses related to services (personal, legal/financial, related to employment) and food/drink activities seem to be under-represented in Kingston Town Centre in comparison with the three other high streets. This could be explained by the lack of diversity of the offer outside of the retail trade sector.

'There is lots of variety of shops and it's well connected by public transport.' [Why do you visit this town centre in particular?]

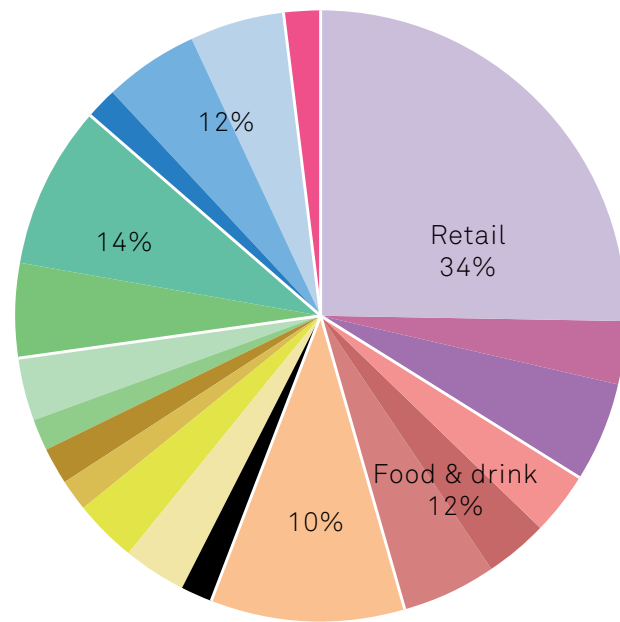
KEY

- Retail - variety
- Retail - chain
- Retail - specific
- Retail - market
- Food & drink - day
- Food & drink - night
- Food & drink - day and night
- Town centre offer - range
- Transport - to work/school
- Transport - connectivity (other)
- Employment - place of work
- Employment - support
- Character - place to linger
- Character - aesthetic
- Character - vibrancy
- People - diversity
- Socialising
- Leisure facilities
- Faith facilities
- Library facilities
- Open space

3.0

TOWN CENTRE USER SURVEY

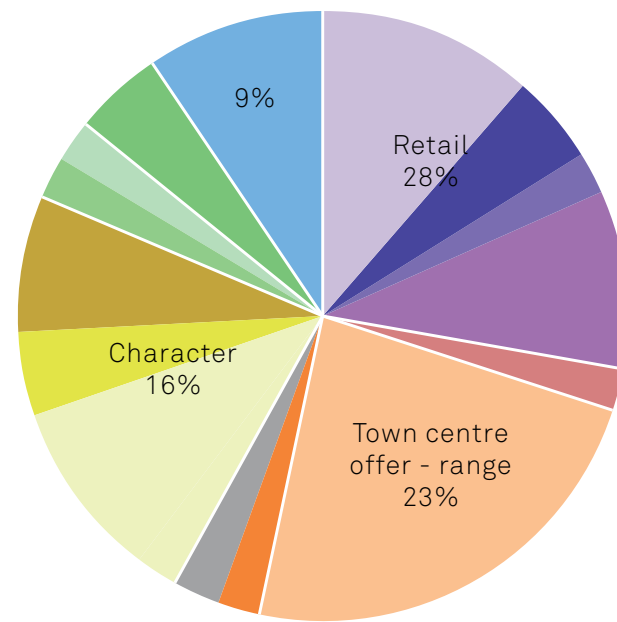
Valuing the town centre



The one best thing in the town centre perceived by its users

People value retail but not only. When asked to identify the 'one best thing' about the town centre, the range of responses varied greatly from 'physical' features such as the retail offer or the existing facilities, to 'non physical' features such as the character and people on the town centre. Whilst retail makes up one third of responses, open space (14%), the quality of the streetscape (12%) and the range of the town centre offer (10%) are amongst other high ranking aspects of what people value the most in the town centre.

'In the summer, it's a nice day out to come walking by the riverside and enjoy the town centre at the end of the walk.'



What town centre users are proud of and would like to see protected

More than a half of the town centre users would like to see the general town centre offer, with a focus on retail, protected. The diversity of the retail offer as well as the presence of independent shops is reported as highly valued. Outside of retail, answers categorised as such included uses such as the cinema, open spaces, flower sellers, places to meet, spaces for community activities, the church, the museum, as well as the ancient market. Overall, this 'range of the town centre offer and diversity of retail was mainly expressed as a kind of 'usefulness' of the area.

Secondarily, the 'character' and 'people' of the town centre is also highly valued. 'People' encompasses reported familiarity with the people on the high street as well as the diversity of people using on the high street. Respondents referred to having friendly relationship with people in the town centre (often people working in the town centre) and local 'familiar' networks. 'Character' relates to the identified vibrancy and quality of the town centre

as places to linger. A number of respondents said that they use the high street to 'meet people' and provides examples of physical attributes that in their opinion were the vital embodiment of community networks and locality of the place: For example, have been cited the open spaces, pedestrian areas, heritage assets and religious institutions. In addition to providing a space for local networks to thrive, the town centre also connects people to other places, both on the street and beyond. This role of connection and connectivity is valued by the users.

The surveyed people of different age groups have different values. 20% of seniors valued character - places to linger and vibrancy - as the one best thing in the town centre. 40% of teenagers/young adults valued food & drink facilities as the one best thing.

People recognise the added-value of certain features of the town centre regardless of their own regularity of use. Others recognise the value that certain features of the town centre have for other people or to making a better high street. The identification of 'non-physical' elements of the high street represent a point of departure between use and value. When comparing the use and value profile of each high street, a discrepancy between what the most used, and what is most valued features of town centre is evident. For example, 65% of people stated that retail is their main use in the town centre, however only 34% of surveyed town centre users responded saying that they valued this the most.

'I would miss the feeling of a sense of community.' [What would you miss most, if the town centre wasn't here anymore?]

KEY

- Retail - variety
- Retail - chain
- Retail - market
- Food & drink - day
- Food & drink - night
- Food & drink - day and night
- Town centre offer - range
- Transport - to work/school
- Character - place to linger
- Character - vibrancy
- People - diversity
- Socialising
- Leisure facilities
- Faith facilities
- Open space
- Open space - river
- Streetscape - infrastructure
- Streetscape - accessibility
- Streetscape - cleanliness
- Proximity to home

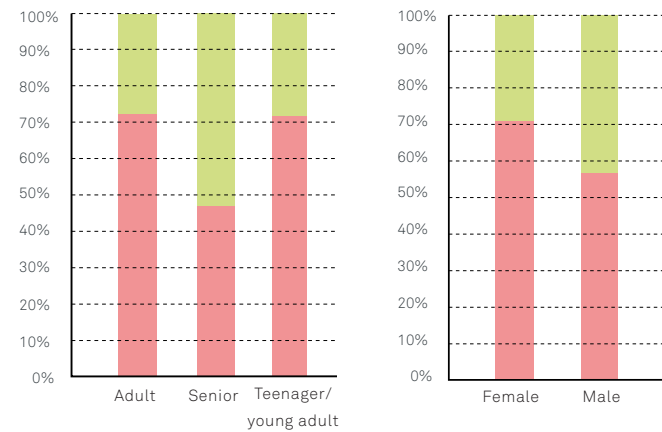
3.0 TOWN CENTRE USER SURVEY

Participation

What do we mean by participation?

'Participation' refers to involvement in organised community activities and social groups - formal and institutional forms of participation. This kind of participation, which focuses on activities such as formal resident forums, youth clubs, health support groups and social groups for seniors is generally linked to a range of community, leisure, faith and health facilities.

This definition of participation excludes engagement and participation with local people and places that are more 'informal' in nature, like social and co-operative networks across family members, friends, ethnic groups on the street, including activities such as information distribution and ad hoc business networks which are not formalised through any kind of traders association or BID structure. These 'informal' forms of participation are often less visible, less easy to discern through online and observational research and less readily identified by respondents as forms of 'participation', but nevertheless offer key support functions.



Involvement in local community groups/social activities

KEY

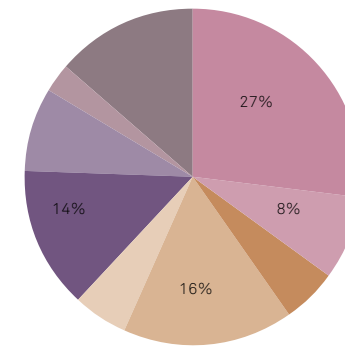
- Yes
- No

Overall, the level of participation in organised community activities and social groups is low.

Just over a third of surveyed town centre users are involved in local community groups or social activities in the area. A higher proportion of seniors take part in local activities compared to adults or teenagers/young adults.

The community groups stated by the town centre users include: the Kingston Rowing Club, the Rose Theatre, Love Kingston, Everyday Church Youth Group as well as a Judo Club

'Apart from the philosophy teaching charity, I'm part of the Kingston Quaker Centre, and I teach sailing to a student group in Ashfield.'



Barriers to participation

KEY

- Time restrictions - work hours
- Time restrictions - family obligations
- Participate elsewhere
- Live elsewhere
- Lack of interest
- Lack of information
- Health restrictions
- Other

Barriers to participation are mainly related to time and information restrictions.

Respondents who weren't involved in formal and institutional forms of participation were asked to identify the reasons why, which underlines localised barriers to participation. Reasons for not being involved in local community groups included time and information restrictions due to working hours or family obligations as well as personal lack of interest. Others visit Kingston Town centre but 'live elsewhere' or are 'not interested'.

Almost half of the people surveyed either know people working in the town centre or have direct ties with the university/school.

The places of worship appear to serve an integral role in contributing to the social value within the town centre, especially since there is a recognised lack of community centres in the local area.

The audit has revealed that many of them offer additional social support services. These include the United Reform Church, which is open every day until 4pm offering a food bank, showers and shelter for the homeless. Street pastors use the church as a base when they are out on the street supporting the community. Also, the Quaker centre provides support for ADHD.

There is evidence of a relatively poor digital participation in relation to the town centre.

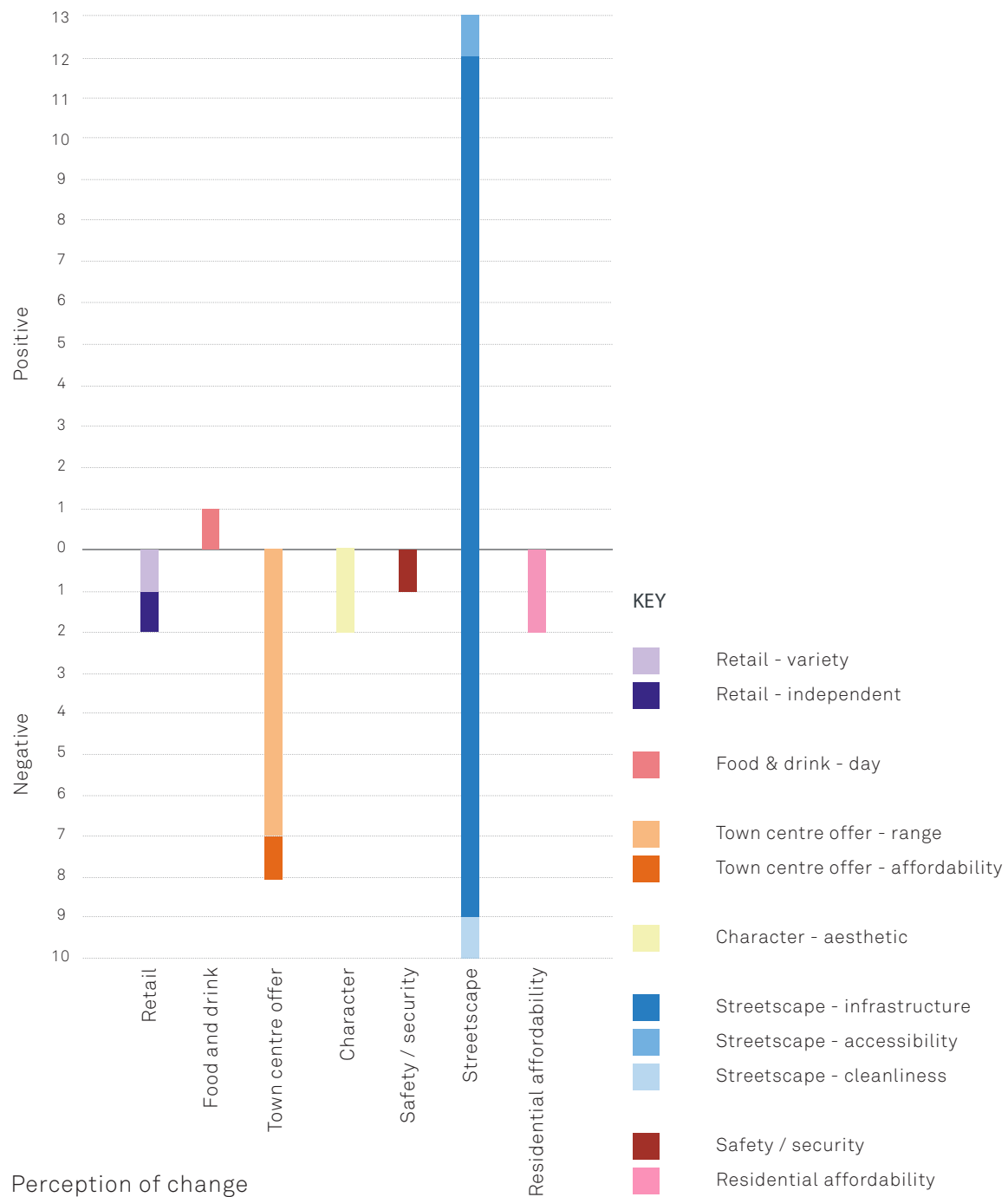
Very few users reported using a form of digital participation, mainly using internet to search for activities or events happening in the local area. However no specific area-based platform, website or social media page was mentioned.

Quaker centre for ADHD support group [Which of these other uses is most important to you?]

3.0

TOWN CENTRE USER SURVEY

Perception of change & aspirations



This page explores references to the town centre as a 'place' and comments on perceived change, be it spatial, economic or demographic. Respondents were asked an open question on whether change in the area has affected the town centre, and if so, how. The graph 'Perception of change' demonstrates that opinions on certain elements of change can be perceived both positively and negatively by different respondents.

A third of respondents stated that they perceived no to little change in the area.

When considering length of engagement with the street, it does appear that those visiting the high street for an extended time (10 years or more) have a proportionally more negative view of change compared with those that had been visiting for less time. Those that had been visiting for 5 years or less tended to have perceived a limited amount of change on the high street.

Across the town centre, many respondents commented on the streetscape reflecting the aspects of physical changes that have been identified previously through the mapping of the completed development schemes. The majority of respondents perceived change regarding the streetscape as having a positive impact on the town centre with many users in particular reporting the cycling facilities, new footpaths and crossings as improvements. However, roadworks have been highly reported as causing nuisance and increasing traffic while some users have also expressed negative comments regarding poor wayfinding and lack of signage in the town centre.

Changes that have affected the town centre offer are seen unanimously as negative. Users regret the lack of diversity in the town centre and that the new offer is exclusively geared towards retail and therefore consumption. The lack of services have also been highlighted a couple of times. Users across all high streets were also asked the open-ended question: 'What changes would get you to use the high street more often or spend more time here?' to identify specific changes that would increase their usage of the high street.

Desired changes identified by users across all age groups referred significantly to non-retail features of the high street, reinforcing the value of the high street beyond its retail offer. Users have reported that they would like more spaces, both indoor and outdoor, to meet as well as affordable spaces for charities or the community to use and 'do things'.

Demand for an increased cultural offer as well as a food and drink offer is expressed by adult users, specifically identifying the high time offer as a desirable feature of the high street. Adults typically would also like to see more independent shops. Young people predominantly identified the desire for increased leisure facilities while seniors have reported the need of spaces to socialise.

'The high streets are getting less human and social and reducing to only retail.'

'I'd like to see more music performances and available venues/pubs for casual performances.'

'More independent shops and coffee shops would make the area more interesting. There are some good independent shops on London Road.'

4.0 TOWN CENTRE BUSINESS SURVEY

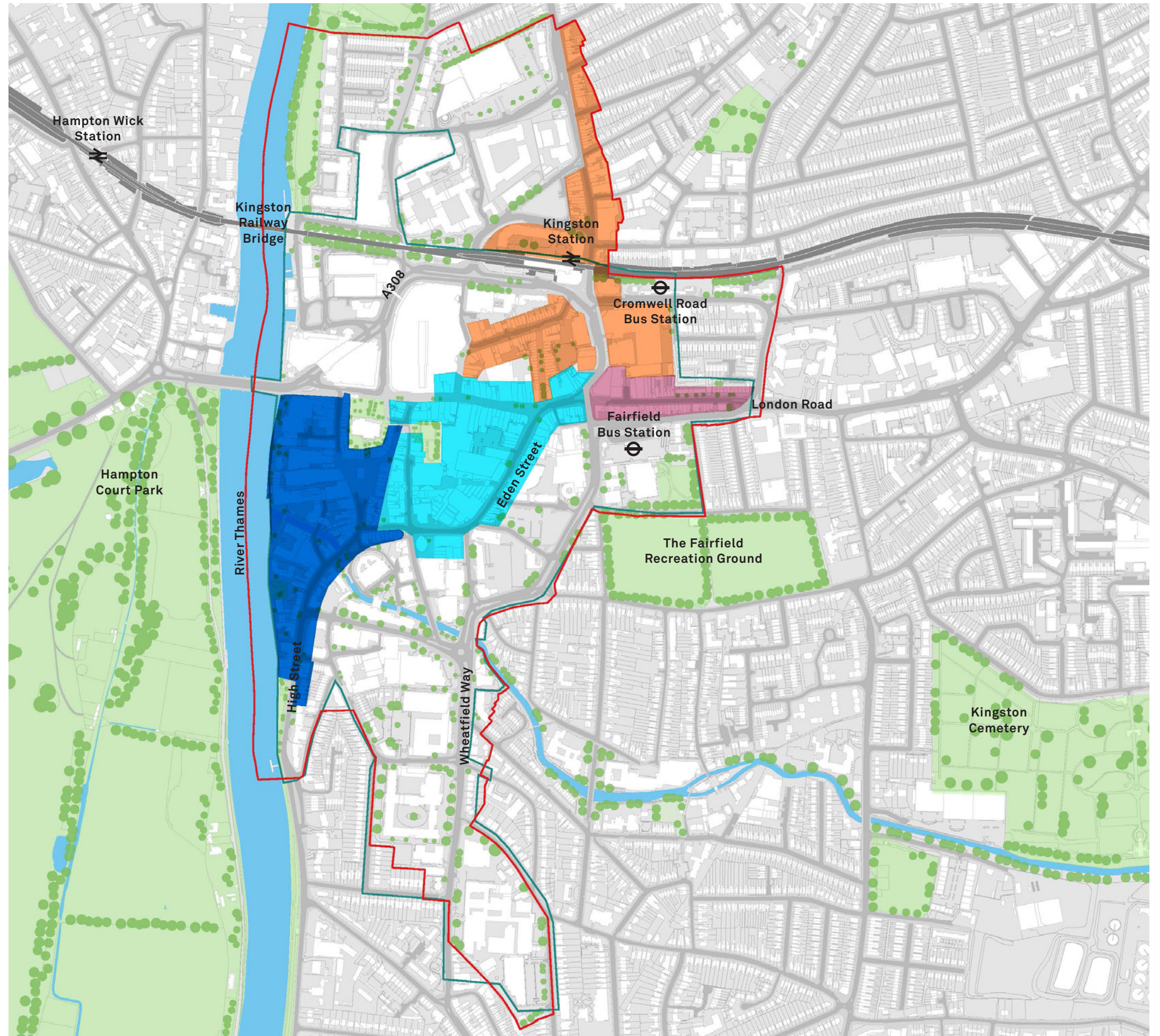
Business survey locations

This section synthesises findings from 55 surveys as a means to better understand the role of the town centre in generating prosperity, both economic and social, seen through the lens of interviews with businesses' proprietors and employees. The research also captures perceptions of changes as well as areas of improvement highlighted by proprietors and employees themselves.

The surveys were conducted in four different sub-areas as shown in the map, with number of businesses surveyed shown below in brackets.

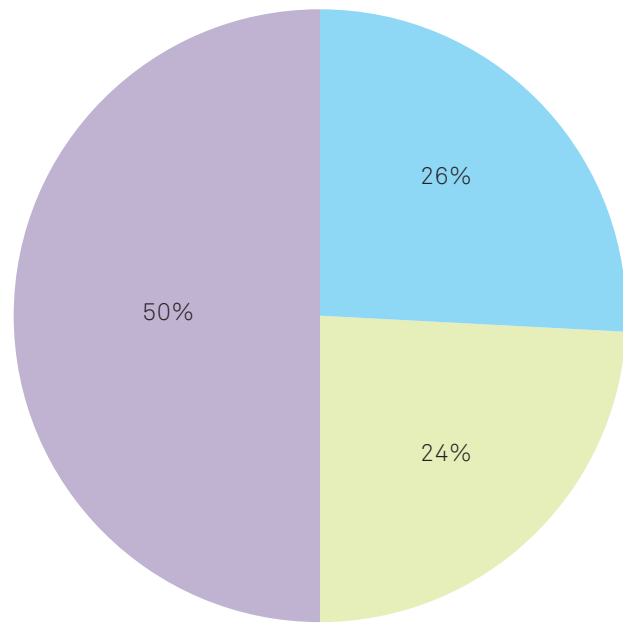
1. Station & Richmond Road (15 businesses)
2. Clarence Street & Eden Street (15 businesses)
3. Ancient Market & Riverside (15 businesses)
4. Old London Road (10 businesses)

The surveys purposefully excluded the Bentall Centre from the study as the methodology is pointed towards businesses and their relationship to the street. This will also allow us to compare the data collected in Kingston with the areas surveyed in High Streets for All.

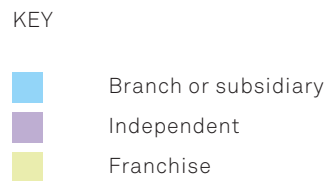


4.0
TOWN CENTRE
BUSINESS SURVEY

Business profile -
type of business



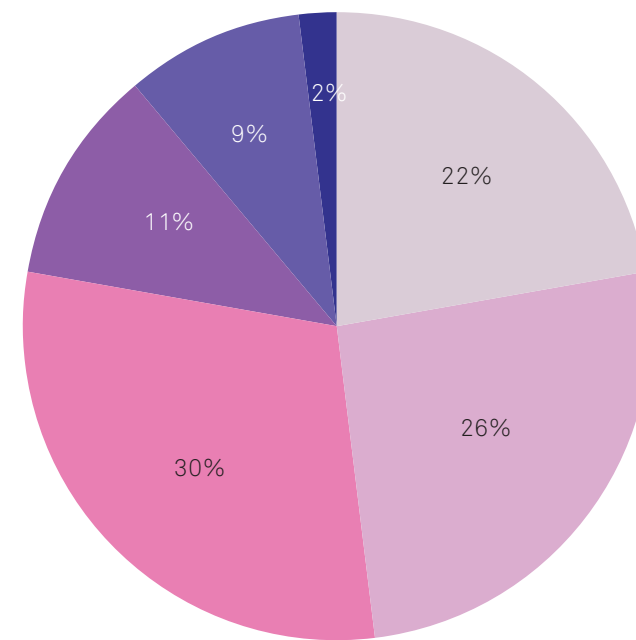
Type of surveyed business in the town centre area overall



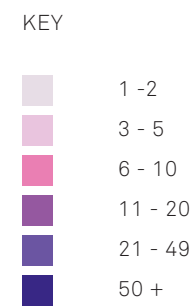
Half of the businesses in the town centre area overall are independent, with a comparable number being a franchised or a branch/subsidiary. Overall the audit reflect a dynamic employment landscape : the town centre offers a range of employment opportunities beyond kin and family. Indeed, non-family businesses dominates the overall employment landscape.

Station & Richmond Road	Nearly three quarters of the businesses surveyed in the station and Richmond Road area are independent , with the remaining quarter being franchises.
Clarence Street & Eden Street	Nearly half of the surveyed businesses in the Clarence Street and Eden Street area are franchises.
Ancient Market & Riverside	The surveyed businesses in the Ancient Market and Riverside area comprise of nearly 60% branches or subsidiaries. Over one third of the businesses in this area are independent, and the remaining 7% franchises.
Old London Road	The majority of surveyed businesses in Old London Road are independent.

Business profile -
number of employees



Number of employees in surveyed businesses in the town centre area overall



Kingston Town Centre has a high economic value, first and foremost, due to the number of jobs it provides. Across our 55 surveys, we interviewed either the proprietor or employee for the number of people employed within the premises. Primarily focusing upon independent businesses as well as charities (with some large chains), each retail unit on average employed **6 to 7 people** which is considered to be quite substantial compared with the average number of employees per unit in the three benchmark cases (3.5). The type and value of these jobs is explored further in this audit.

Station & Richmond Road	The station and Richmond Road area revealed the highest proportion of businesses with 1-2 employees.
Clarence Street & Eden Street	Over one third of the businesses surveyed in the Clarence Street and Eden Street area employ 6-10 people , with the remaining businesses employing a range of number of employees.
Ancient Market & Riverside	The only business with over 50 employees was surveyed in the Ancient Market and Riverside area. This is the Rose Theatre, where approximately 80 people are employed.
Old London Road	The surveyed businesses in Old London Road mostly employ up to 5 people.

4.0 TOWN CENTRE BUSINESS SURVEY

High street offer & adaptability

An important facet of the economic value provided by the town centre is related to the mix of retail services and commodities they offer for a range of local buyers. The figures show a breakdown of the type of businesses where surveys were conducted across the four sub-areas.

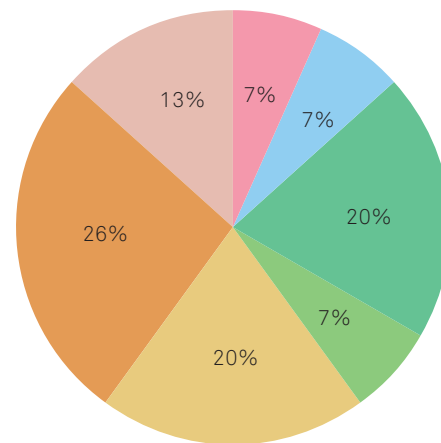
Overall, Kingston Town Centre is characterised by the over-representation of businesses in the retail trade sectors. While Richmond Road Station and Old London Road host a relatively high proportion of businesses from the service sector (including a solicitor, a personal credit institution and specific trade contractors), The two other areas are characterised by the high proportion of businesses in the clothing and domestic goods sale sectors. The beauty sector is highly represented in the Clarence St & Eden St. The food and drink sector is concentrated within the Ancient Market & Riverside area and secondarily around the Station Area & Richmond Road.

Overall, and in comparison with the three benchmark cases, the food and drink sector as well as the service sector seem under-represented, with most of the retail offer being limited to the trade of convenience goods.

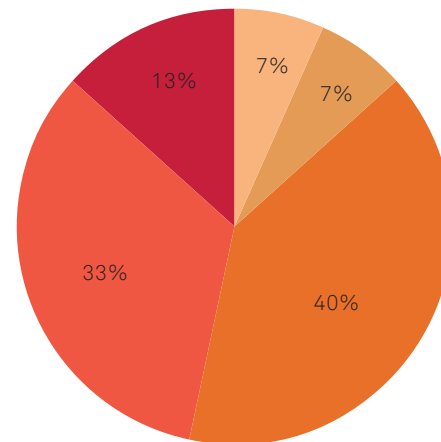
Kingston Town Centre provide opportunities for both new and long standing businesses, suggesting that the economic capacity of the street has the potential to be adaptive. The proportion of new and long standing businesses in the high street is overall comparable to the three benchmark cases.

However, the newly opened businesses are not contributing to the diversification of the town centre offer which remains dominated by the importance of the retail trade sector. Longer established businesses can be found in the station and Richmond Road area whilst Clarence Street and Eden Street host a majority of recently established businesses.

Station Area & Richmond Road

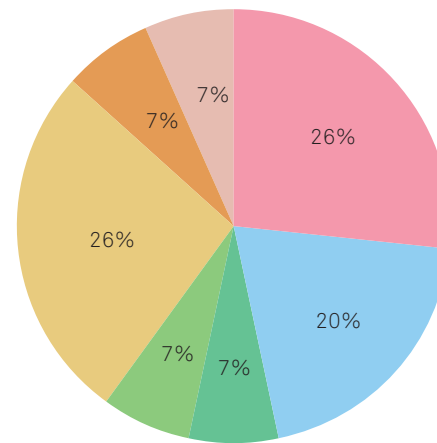


Type of shop

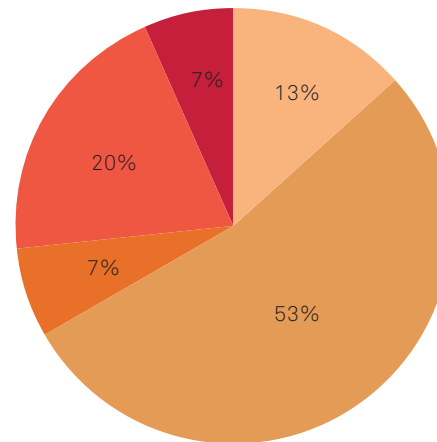


Age of business

Clarence Street & Eden Street

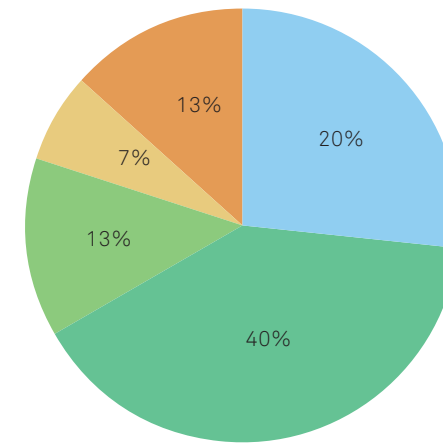


Type of shop

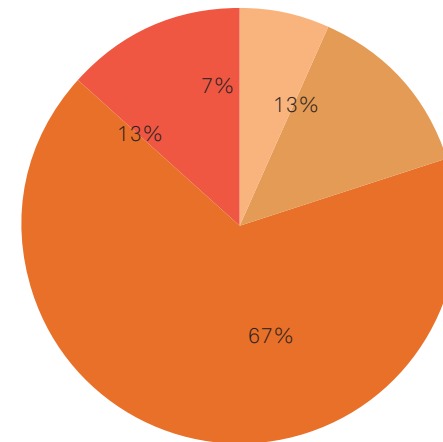


Age of business

Ancient Market & Riverside

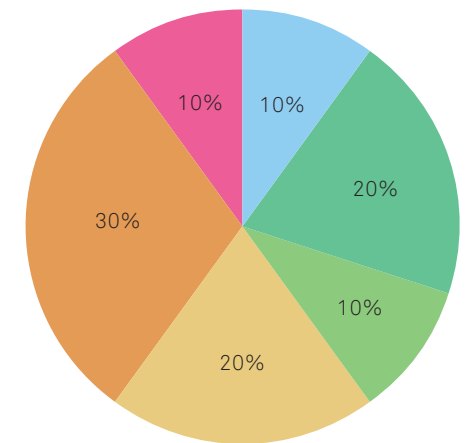


Type of shop

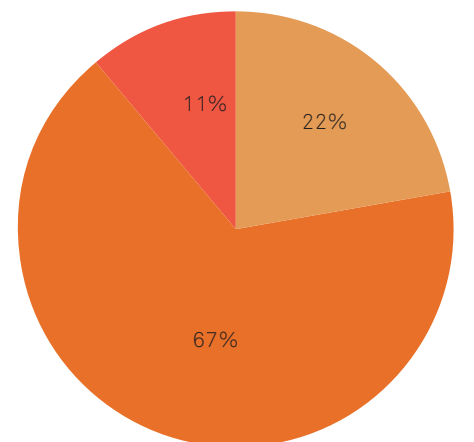


Age of business

Old London Road

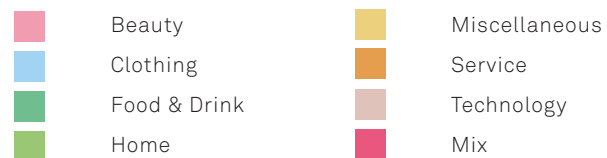


Type of shop

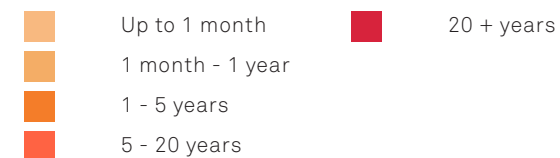


Age of business

Type of business



Age of business



4.0 TOWN CENTRE BUSINESS SURVEY

Employment opportunities

The audit reveals that Kingston Town Centre provides opportunities for both long term and short term employment. While 20% of the surveyed employees have been in their position for more than 5 years, 40% of them have been employed for less than a year. This suggests that there is a relatively high level of employee turnover in the town centre as well as the existence of short term employment opportunities. The survey further revealed that short tenure of employees mainly concerns young adult (up to 25). This suggests that the young workforce are likely to consider retail work as a temporary option while employees above 25 are more likely to consider their retail positions as a long term employment option. The town centre appears to provide for both groups.

The town centre provides slightly more part-time jobs than full-time jobs, indicating that the area offers flexible employment provision and opportunities for flexible working hours but this also suggests an unstable and insecure employment landscape. The survey also revealed that several clothing shops and cafés predominantly employ part-time employees, including local students. The combination of the opportunity for flexibility and short term employment can be seen as an opportunity as well as a limitation. Part-time work can be indicative of precarious work opportunities, characterised by itinerant, low-pay and often insecure employment. However, part-time work can also act as an opportunity for first-time employment, Saturday jobs for youth and students, part-time work for elderly (filling a social gap in their lives), and jobs for women who need flexible part time work.

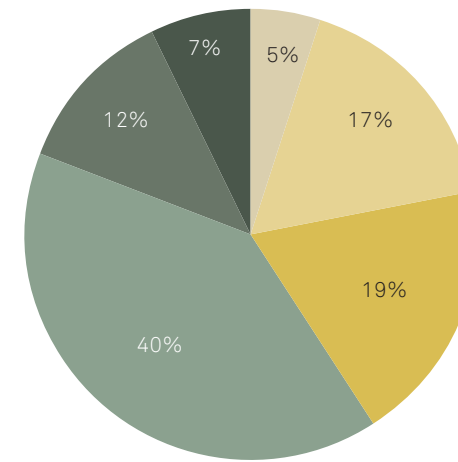
The town centre offers a spectrum of opportunities for women, contributing to its socio-economic value. However, the audit suggests that the town centre still operates as a male-dominated employment space. As a percentage of the total number of employees and shop owner surveyed, the survey revealed that more than 60% of jobs are held by men. A more nuanced picture emerges when men and women's nature of employment is analysed. The adjacent figure breaks downs interviewees

in relation to their gender and their employment status: whether they were in full time or part time employment at the time of surveying. Full-time job is evenly spread between male and female while part-time jobs are held overwhelmingly by female. However, in comparison to the three benchmark cases of the High Street For All Study, Kingston appears to be the most-gender neutral street.

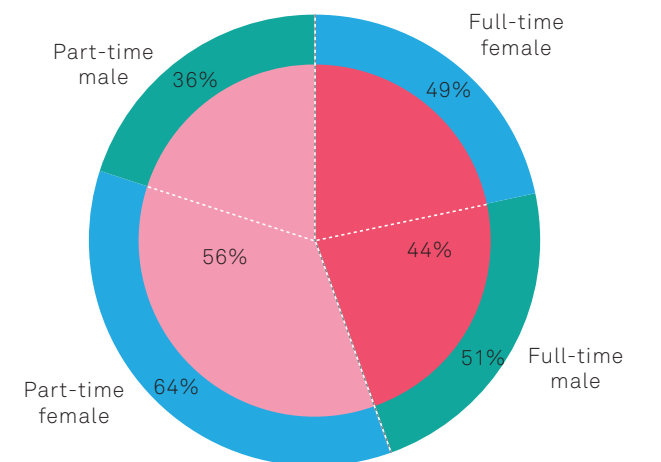
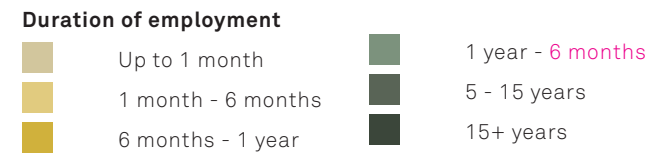
The town centre has a relatively large catchment area and offers employment opportunities and opportunities both locally and beyond the local.

On one hand, the audit shows that a high number of proprietors and employees commute over significant distances to work in the town centre. 40% of them travel between 30 minutes and 1 hour to reach work, suggesting the employment offer is worth travelling for. On the other hand, 30% of the people surveyed are walking to get to work suggesting that a large number of them live locally. On average, it takes 28 minutes to get to work in Kingston, whilst it takes an average of 25 minutes for the employees of Lewisham, Burnt Oak and Lower Clapton town centres to travel to work.

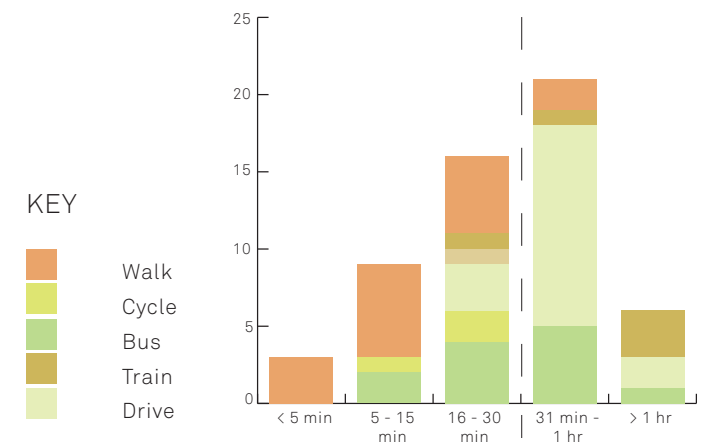
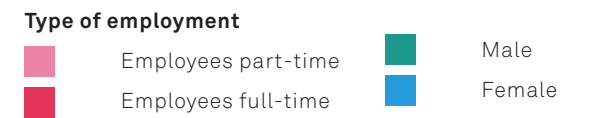
33% of the respondents are travelling to work by car. Given this percentage of car use, it is not a surprise that many businesses have commented on the streetscape and expressed the need for better parking provision. However, the proportion of employees and proprietors driving to work is significantly less than in other town centre such as Lewisham or Burnt Oak (more than 50%).



Duration of employment to date



Type of employment and gender



How do people travel to work in Kingston Town Centre and how long does it take them

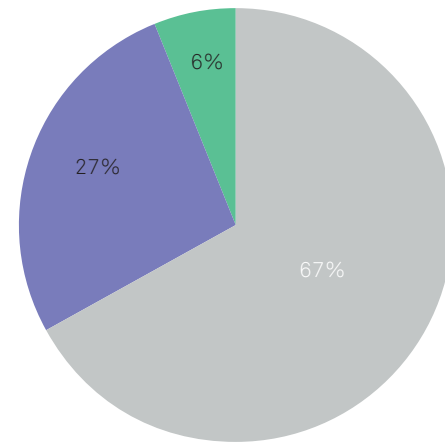
4.0 TOWN CENTRE BUSINESS SURVEY

Offer and use

Most businesses interviewed worked standard day time hours. Very few are contributing to a night time economy and night time offering is considered to be relatively poor. The offer is quasi-exclusively concentrated within Old London Road and Ancient Market & Riverside areas. In the Old London Road area only, nearly 20% of businesses in the Old London Road area are open until late. Businesses that are opened until late includes public houses and restaurants,

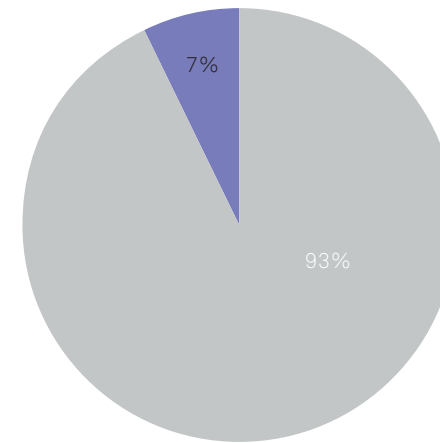
Only one third of people working in the station and Richmond Road area make use of the town centre/high street, further highlighting severance between the area north of the station and the rest of the town centre. In comparison, most people that work in the other surveyed areas do. The survey revealed that a reason for people working in the station area not using the town centre is due to physical separation, and poor accessibility for less able people.

Station & Richmond Road



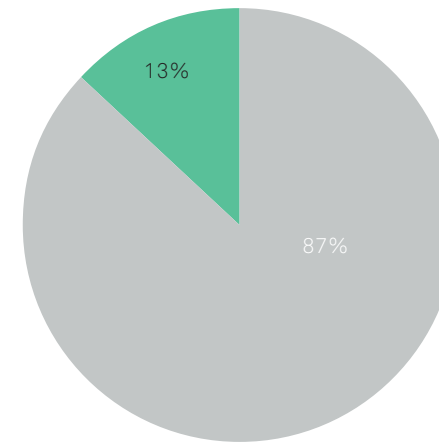
Hours of operation

Clarence Street & Eden Street



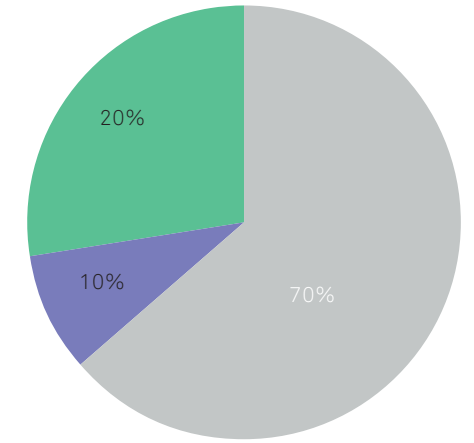
Hours of operation

Ancient Market & Riverside

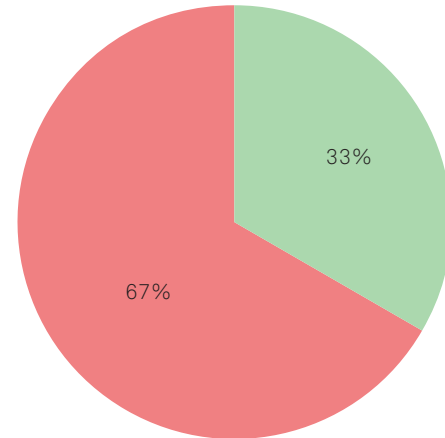


Hours of operation

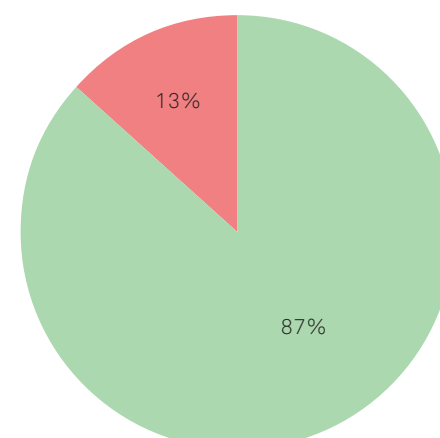
Old London Road



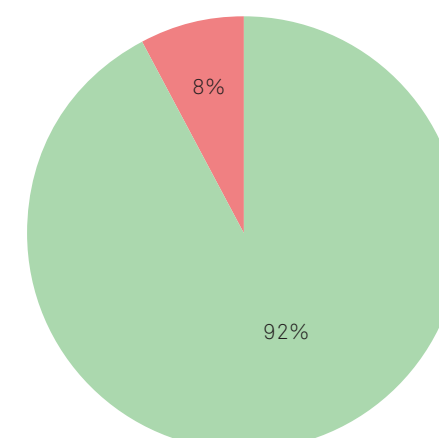
Hours of operation



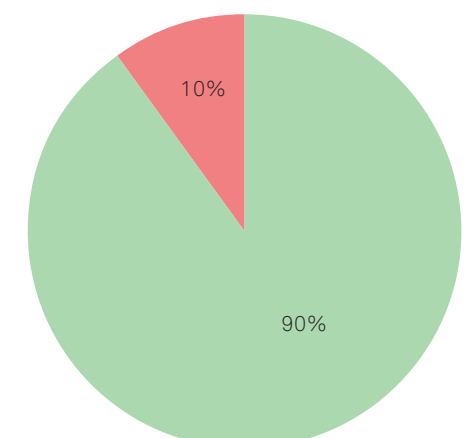
Use of town centre/high street



Use of town centre/high street



Use of town centre/high street



Use of town centre/high street

KEY

Usual hours of operation

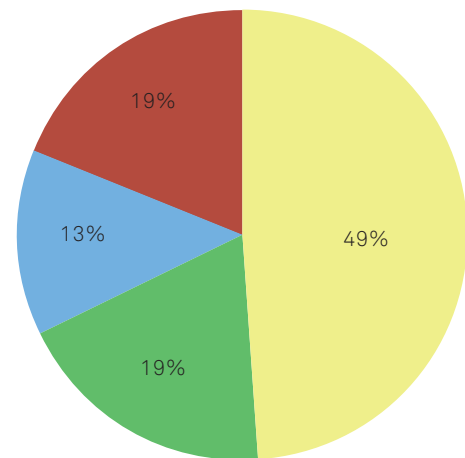
- Mainly daytime (e.g. 9am-6pm)
- Mainly daytime and early evening (e.g. 8:30am-8pm)
- Mainly evening (e.g. 12pm-12am)

Use of town centre/high street

- Yes
- No

4.0 TOWN CENTRE BUSINESS SURVEY

Use of technology



Use of technology

KEY

- Website only
- Third party only
- Both website and third party
- None

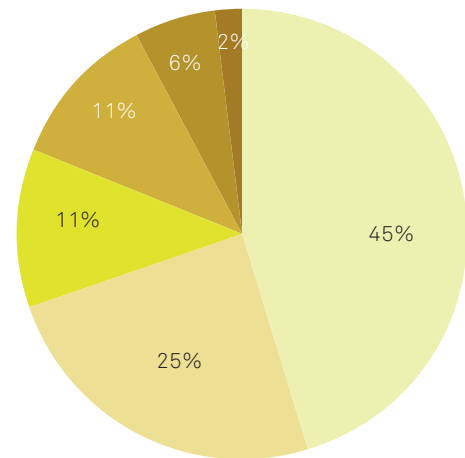
Almost half of the businesses surveyed use a website to help sell their products or services. The survey also revealed that whilst most of the retail businesses make use of a website, professional service businesses use social media/third party providers.

'We don't use technology, [to help sell our products] just word of mouth.'
- Employee of a fabric shop

'We have a website, presence on trip advisor, Treat Well, and other marketing platforms.'
- Proprietor of vintage clothes shop

4.0 TOWN CENTRE BUSINESS SURVEY

Social value



No. of languages spoken in the surveyed business

KEY

Lightest yellow	1	Lightest brown	4
Light yellow	2	Light brown	5
Yellow	3	Dark brown	8

30% of people working in the businesses surveyed speak three languages or more. Our surveys showed that proprietors and employees speak a range of languages that can allow them to hold conversations with, and in some instances, help those who frequent their stores and streets more effectively.

4.0 TOWN CENTRE BUSINESS SURVEY

Social value

Since there appears to be relatively few institutional or formal social infrastructures across the town centre, it seems crucial to appreciate different forms of social value provision occurring across the town centre and outside of these traditional channels. The following pages map out the formal social infrastructures in each sub area as well as the additional, parallel, informal services that businesses offer in each location.

In addition to the services provided by the core social infrastructure, additional 'informal' services are provided by shops in addition to their core trade. This suggests that not only is the high street a critical piece of core infrastructure but also integral to 'soft' infrastructure networks found in shops and other services.

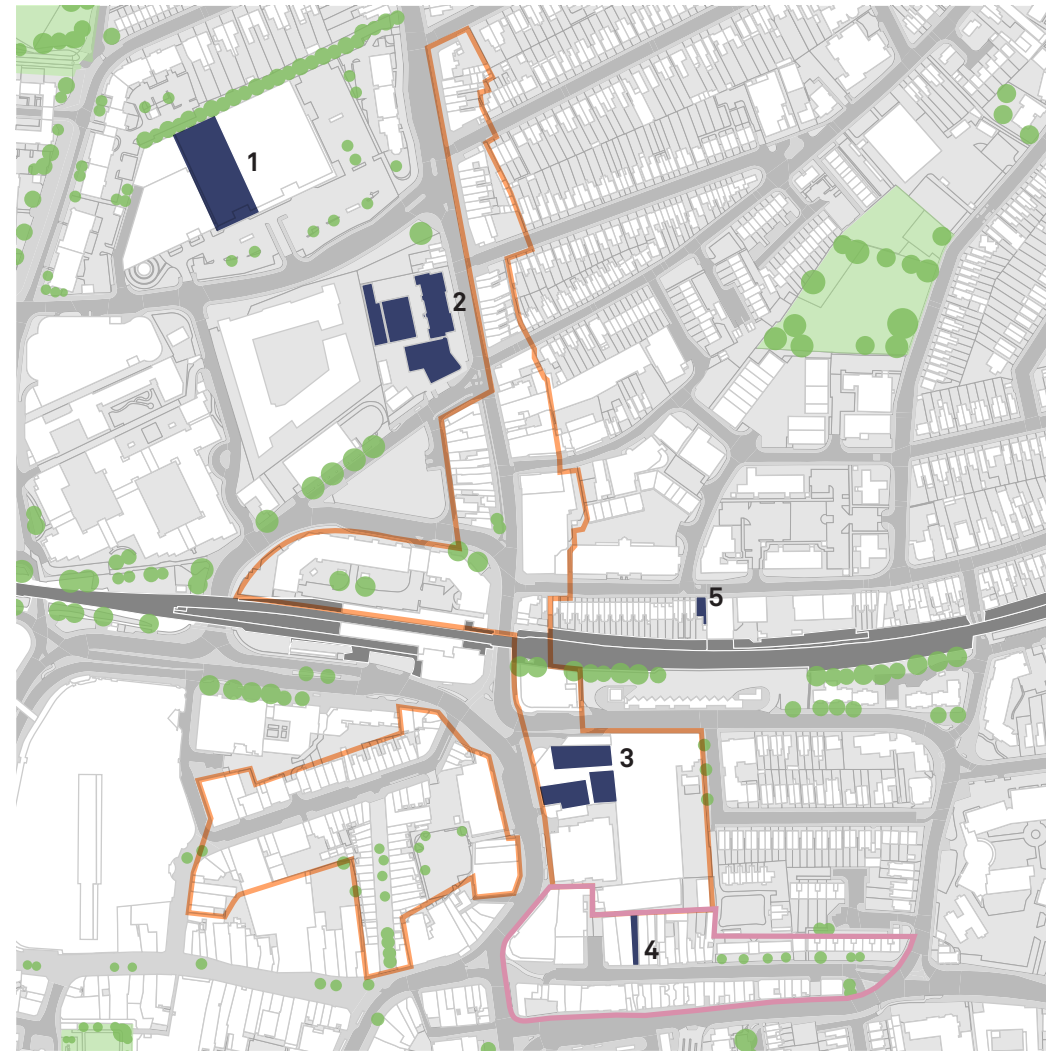
However, respondents often failed to perceive the social value they or their businesses create, or the value of engaging with other businesses on the street.

39 out of 55 businesses (71%) have recorded helping people by giving directions to key landmarks or local amenities, across all areas of the town centre.

The survey revealed that local public houses are showing a duty of care. For example the 'ask for Angela' scheme, where staff provides assistance if someone feels uncomfortable. Also, advice is provided for people looking for accommodation.

'We have a duty of care for people, so that no one feels uncomfortable; also customers and passers-by ask about rooms or flats to rent in the area.'
- Employee in a local pub

'My customers often ask me about authentic places to visit in Kingston.'
- Proprietor of a beauty salon

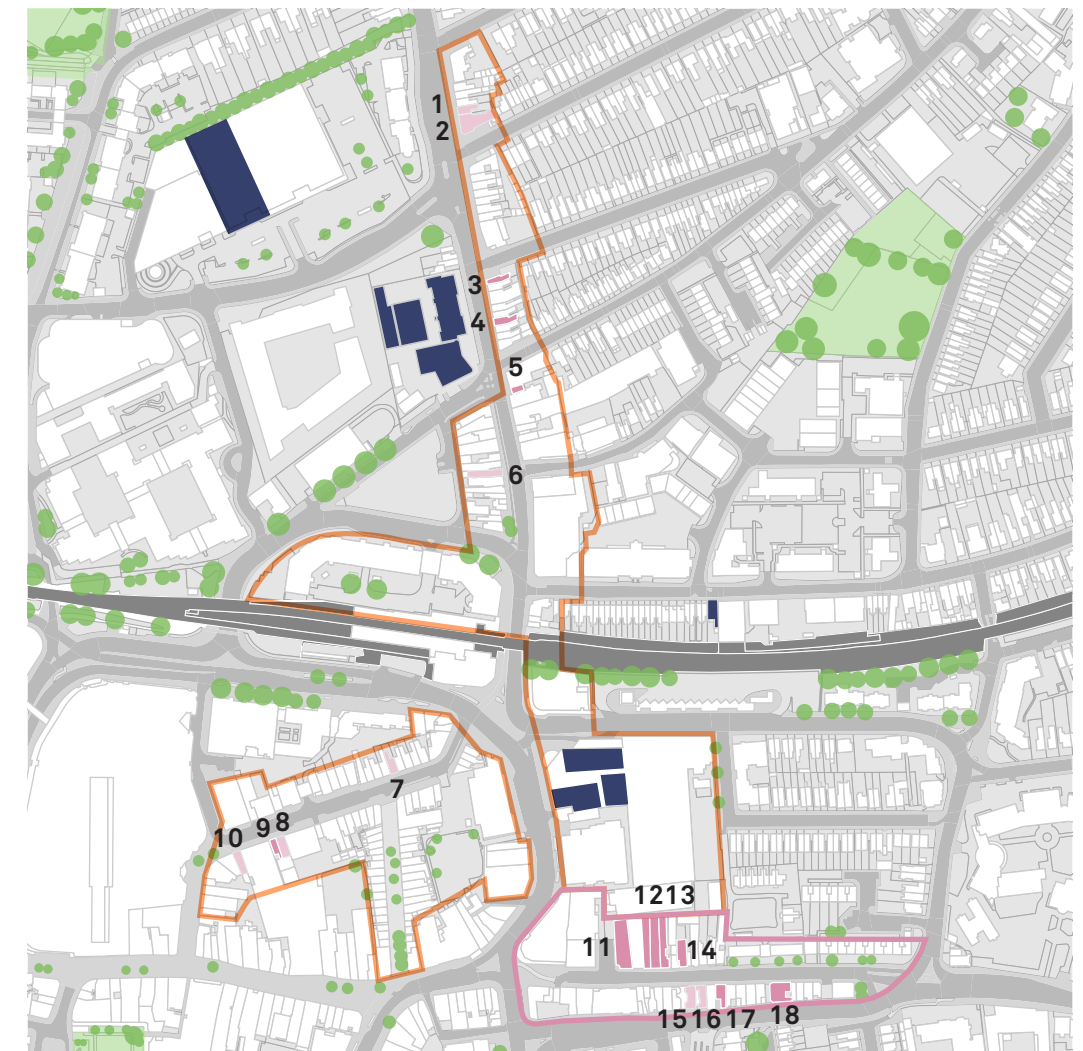


Core social infrastructure in the station & Richmond Road area and Old London Road

1. Health Fitness and Wellbeing Club
2. College
3. Leisure Centre with cinema, gym and bowling
4. Natural Health Centre
5. Voluntary action

KEY

- Station & Richmond Road
- Old London Road
- 'Core' social services
- 'Additional' social services
- 'Additional' social services - directions



Additional social infrastructure in the station & Richmond Road area and Old London Road

1. Rug cleaning services
2. Print shop
3. Deli shop
4. Fish and chips shop
5. Public house and music venue
6. Tattoo studio
7. Audio shop
8. Party supplies
9. Hearing specialists
10. Men's clothing shop
11. Charity shop
12. Fabric shop
13. Nail spa
14. Clothing shop
15. Kitchen renovator services
16. Pawn shop
17. Hot food takeaway
18. Public house and music venue

4.0
TOWN CENTRE
BUSINESS SURVEY

Social value

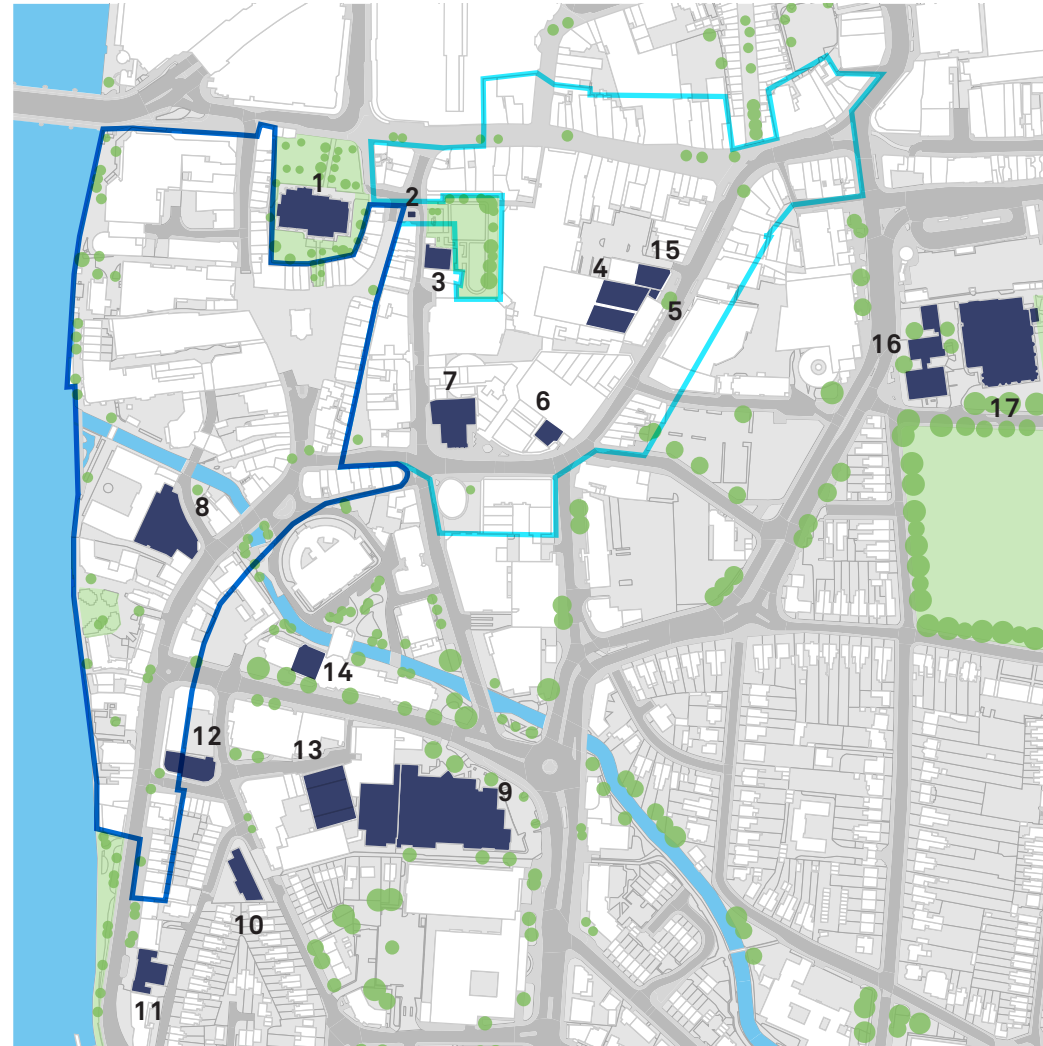
Businesses within the Ancient Market & Riverside, and Clarence Street & Eden Street areas provided more varied additional social infrastructure, compared to the other areas surveyed. A bridal shop on Ram Passage provides 'counselling' and 'shares experiences' with customers, whilst the Gazebo Pub provides visitors with information about local attractions.

Employees of retail shops stated that they understand their occupation to be sociable. Sometimes people come to the shops for social interaction or a confidence boost.

'Visitors ask about riverside attractions like boat rides and other day-time activities.'
- Employee in a riverside pub

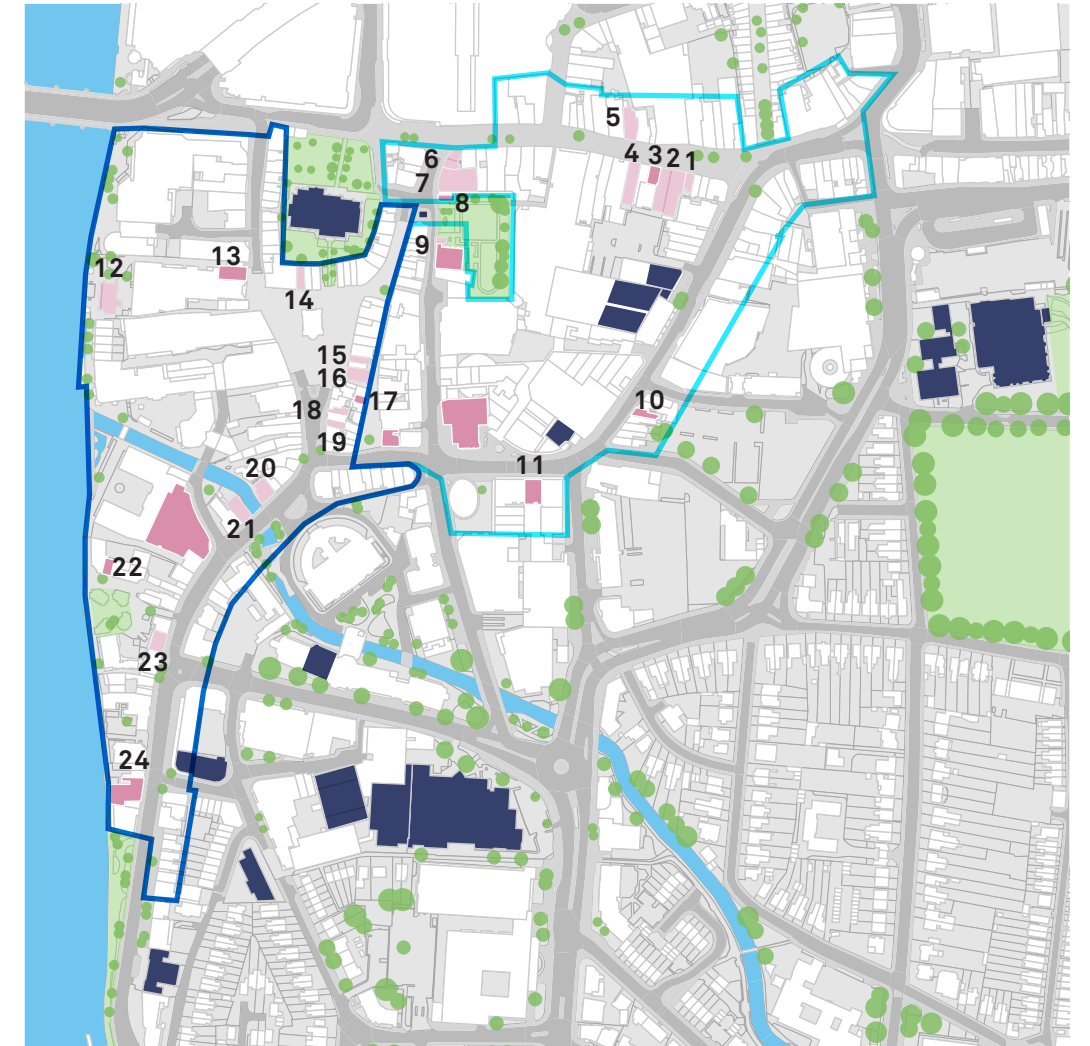
'We give people style and make them feel confident about themselves.'
- Employee in a clothing shop

'Sometimes we counsel people and generally share experiences with them.'
- Employee in a clothing shop



Core social infrastructure along Clarence Street & Eden Street and Ancient Market & Riverside

1. Church
2. Youth Enquiry Service Health bus
3. Church
4. Citizens Advice Bureau non-profit organisation
5. Arts Studios
6. Creative Youth arts organisation
7. Church
8. Theatre
9. College
10. Scouts hall
11. School of Art
12. Centre for independent living
13. Trampoline academy
14. Services for people with visual or hearing impairment
15. Race & equalities council
16. Museum & Library
17. Leisure Centre



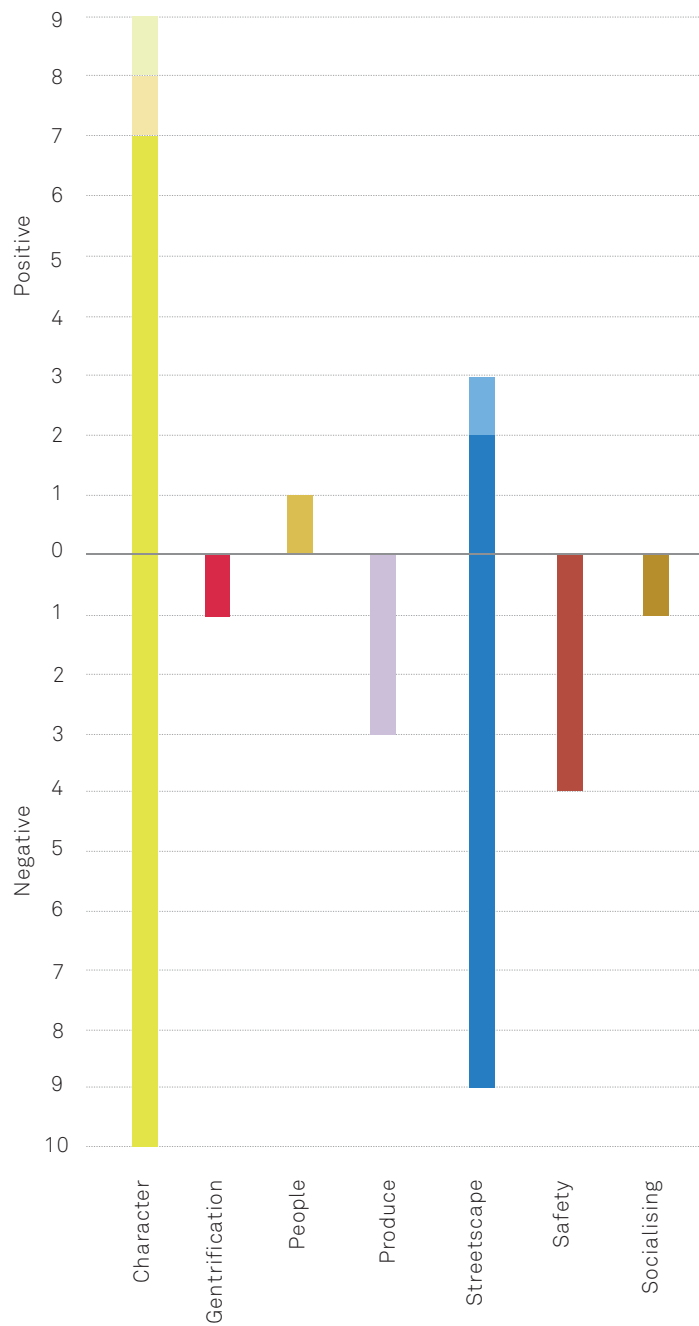
Additional social infrastructure along Clarence Street & Eden Street and Ancient Market & Riverside

- | | |
|--------------------------|----------------------------------|
| 1. Fragrance store | 13. Clothing shop |
| 2. Fragrance store | 14. Clothing shop |
| 3. Men's clothing shop | 15. Stationery shop |
| 4. Clothing shop | 16. Clothing shop |
| 5. Luggage shop | 17. Cafe |
| 6. Jewellery shop | 18. Tile shop |
| 7. Sports clothing | 19. Health food store |
| 8. Phone repair | 20. Insurance company |
| 9. Candle & perfume shop | 21. Kitchen renovator services |
| 10. Cafe | 22. Bridal ware |
| 11. Charity shop | 23. Estate agents |
| 12. Gastropub | 24. Public house and music venue |

- KEY
- Clarence Street & Eden Street
 - Ancient Market & Riverside
 - 'Core' social services
 - 'Additional' social services
 - 'Additional' social services - directions

4.0 TOWN CENTRE BUSINESS SURVEY

Perception of change



Perception of change

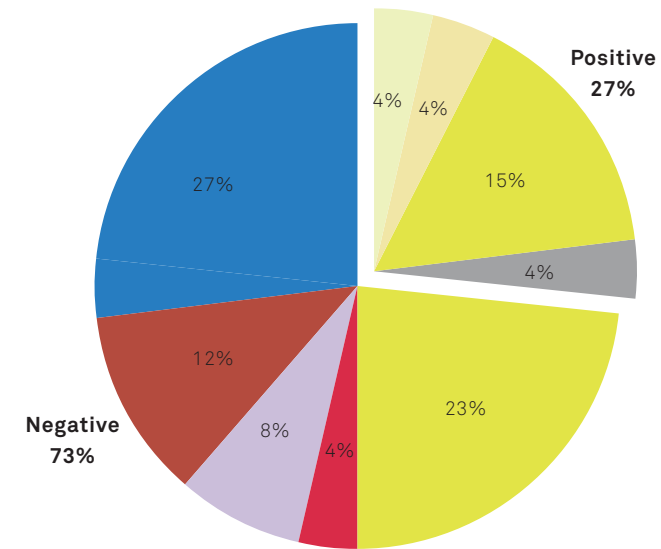
This section explores references to the town centre as a 'place' and comments on perceived change, be it spatial, economic or demographic. Respondents were asked an open question on whether change in the area has affected the town centre, and if so, how.

Overall, respondents found that the town centre had declined, becoming less safe and more congested. Some businesses were unhappy with long-term traffic maintenance works while others believed that the town centre was starting to 'improve' due to changes on the road network. The respondents have also reported less footfall in the area presumably because of little to no parking near town centre. Other reasons affiliated with this change was internet shopping.

A large proportion of businesses perceived a change in the town centre's character in relation to 'busyness'. However perceptions of this change varied across the different businesses, with both negative and positive feedback being recorded.

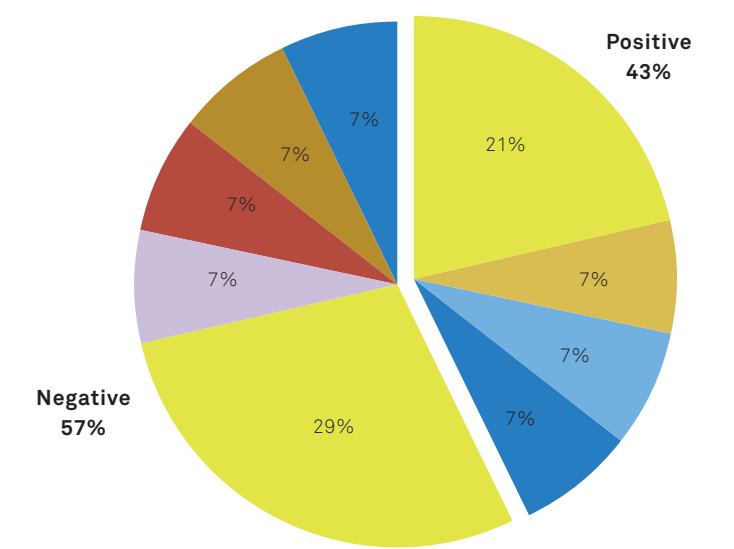
A number of businesses reacted positively to larger student footfall and new residential and cinema developments along with festivals and events attracting people into the town centre. However other businesses perceived that less residents and people from other areas were coming into the town centre. There is consistently polarisation across the sub areas i.e.. businesses within similar locations have different perceptions of change in character.

- Character - aesthetic
- Character - places to linger
- Character - vibrancy
- Gentrification
- People - diversity
- Produce - diversity
- Streetscape - cleanliness
- Streetscape - infrastructure
- Safety/ security
- Socialising
- Transport - connectivity



Perception of change by surveyed people that have been working in the town centre up to 5 years

When considering length of employment, it does appear that those who have been working in the high street for an extended time have a proportionally less negative view of change compared with those that had been working in the area for less time. This could be explained by the recent roadwork nuisances that may have influenced opinions of those that are working in the area for a short period of time or those who are seeing the future benefit of the improvement work,

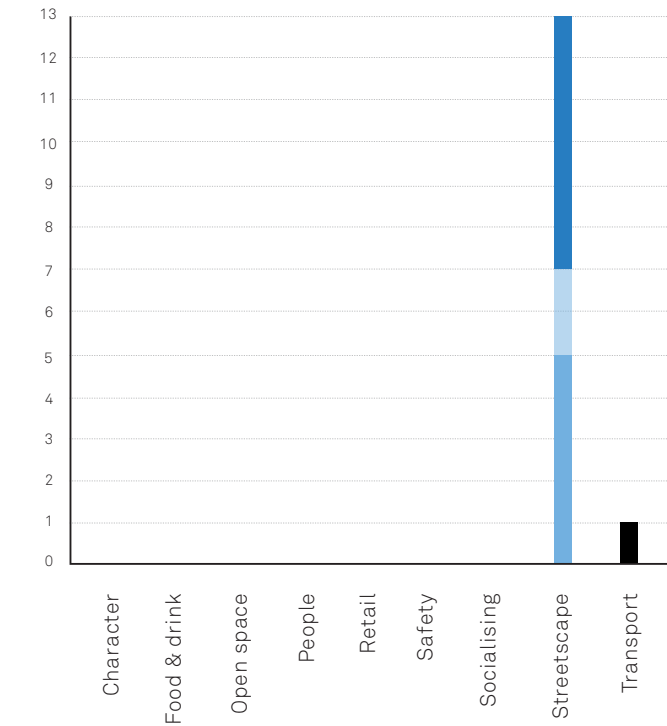


Perception of change by surveyed people working in the town centre over 5 years

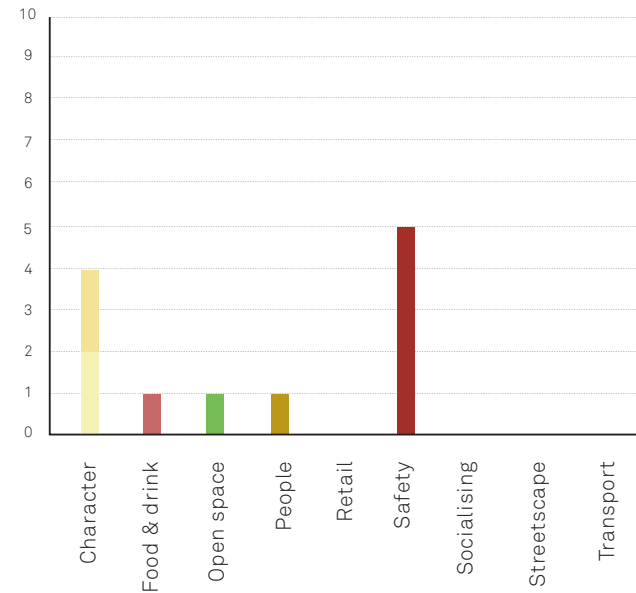
Almost the same amount of surveyed people who have been working in the town centre for over 5 years perceive the changes in terms of vibrancy positive or negative. Other perceptions of change are thematically varied, which shows that different people have different priorities or focus on different aspects in the town centre.

4.0 TOWN CENTRE BUSINESS SURVEY

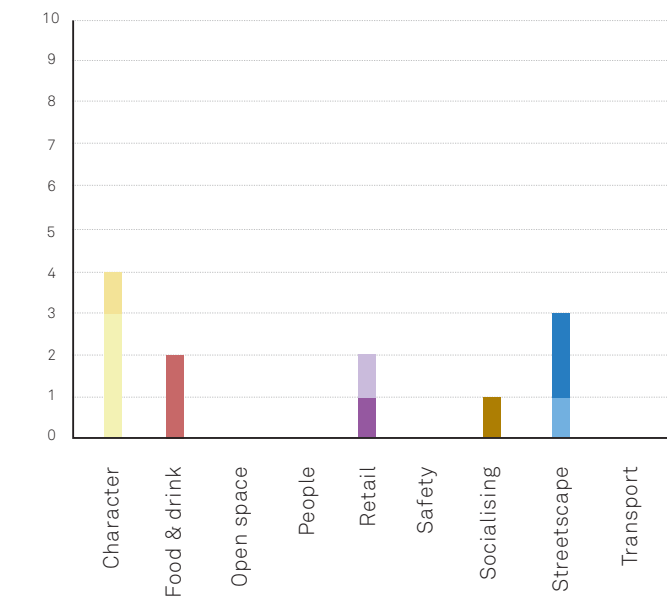
Improvements that would like to be seen in the town centre



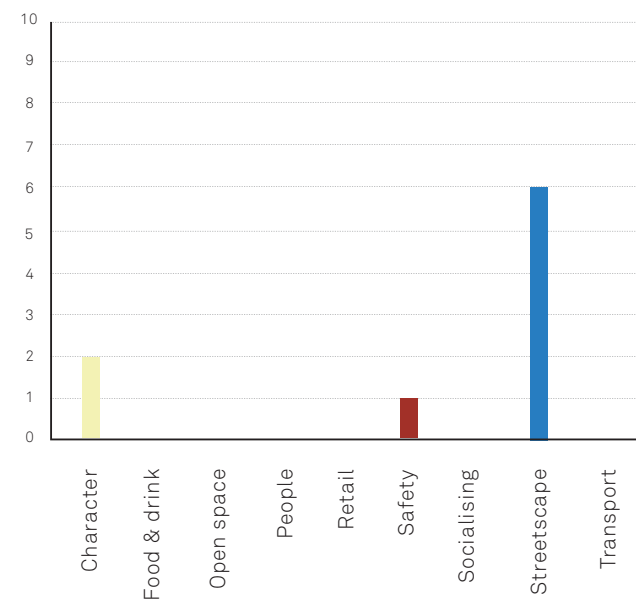
Station & Richmond Road



Clarence Street & Eden Street



Ancient Market & Riverside



Old London Road

Kingston Town Centre is spread across different areas. The spatial settings of the town centre contributes towards a diverse set of opinions, particularly relating to perception of change and aspirations.

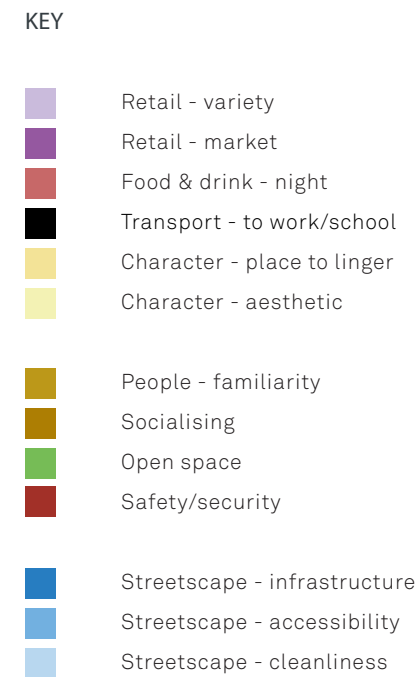
Reported aspirations and desire of improvements relate quasi-exclusively to the physical attributes of the town centre, mainly issues related to parking and cleanliness.

In the Station & Richmond Road area, respondent highlighted the need for improved parking provision. Statements included the desire for more drop-off, disabled as well as short term parking provision.

People surveyed that are working in the Clarence Street & Eden Street area would like to see more physical security presence (lighting, security guards), as well as benches where people could sit to eat their lunch. More outdoor seating would offer people who are only visiting rather shopping, or as a break during a shopping spree, a place to rest.

People surveyed that work in the Ancient Market and Riverside area would like to see more greenery and lighting, as well as more seating and bins as well as more support directed to small and independent businesses.

People surveyed that work in the Old London Road area would like to see more cycle parking, rubbish bins, trees and greenery.



‘Benches that people could use to eat their lunch; more greenery; more places to sit down; more lighting and active surveillance.’

‘More outdoor seating, for people who are only visiting rather shopping, or to rest in-between shopping.’

Evening and night-time
economy and activation

The evening and night-time economy in Kingston forms a specific focus of the Social Value Audit, as this has been identified as sparse and with room for improvement.

Telephone surveys with representatives from a range of different organisations that operate within the town centre have been conducted, to understand more about how they currently function during the hours between 6pm and 6am. Also, current shortcomings and opportunities for improvement have been identified.

Below is a short description of the organisations and their representatives that were interviewed.

Volunteering

Volunteering Kingston has been established for approximately one year and helps organisations find volunteers, offers expert support on volunteering and helps volunteers find roles. There are about 200 organisations registered with the organisation, some more active than others, and a high percentage are health organisations. Whilst this organisation operates mostly during the day, they support Kingston Churches Action on Homelessness which provides a night shelter from October to March.

‘Staffing evening events can be a challenge, however turn-out would be better as people attending have then left work.’ - Volunteering Kingston

Kingston Voluntary Action was established 50 years ago and the respondent has worked there for seven years. The organisation provides infrastructure, training and funding advice to local community groups in Kingston. Whilst this organisation operates mostly during the day, they have referred to St Peters Church Norbiton, that offer support activities in the night-time such as a year round shelter and street pastors.

Culture

The Rose Theatre Kingston is the largest producing theatre in South West London, with over 150,000 visitors a year. It opened in 2008 and the respondent has been working there since 2011. The visitors to the theatre are mostly middle to upper middle class, with young people being difficult to attract. It also proves difficult to attract people to stay in the town centre after the shows - patrons often eat before the show rather than after, because the offer is very limited once the shows have finished.

‘The streetscape needs activation with performance or iconic art. Kingston isn’t ‘cool’, therefore it’s hard to attract ‘cool’ people. Young people will determine what’s cool.’ - Rose Theatre

Creative Youth is a charity that aims to enable young people to realise their potential through the Arts. The charity has been running for 10 years, and allows young people in Kingston and surrounding areas to be involved in innovative, original, ambitious projects working with artists of the highest quality. The events that Creative Youth organises in the evening are mostly indoors, for example at the Rose Theatre, Kingston College, or in local bars. It appears to be difficult to put on events outdoors in the evenings, due to logistics and cost of security and required permissions.

‘We aspire to do something a bit like the Fringe Festival in Edinburgh, for music and performance events. Pop-up and more unusual places such as empty shops for use around the year would be ideal.’ - Creative Youth

Music

CIRKT is a programme funded by the Mayor of London as part of the London Borough of Culture initiative. They are working with venues, musicians and community partners to create a programme of events and to support the borough’s live music offer during 2019. The programme runs from February - December 2019. Their research shows a demand for evening and night-time economy, but currently students go outside of the borough for evening events. Young people and students are looking for more ‘alternative’ places.

‘Safety is not really an issue, the town centre is clean and appealing. There is a ‘spirit’ that is lacking, there are lots of organisations but there seems to be a disconnect. Places that are open late are missing.’ - CIRKT

Banquet Records has been operating for 40 years, with 5 or 6 of these at the current scale and success, and the respondent has been there for 20 years. The record shop and music label organises events in the town centre using dedicated music venues as well as night clubs, All Saints Church or Kingston College.

A key gap identified in the town centre are smaller venues that support 150 to 200 people. Licensing and perceived anti-social behaviour prove to be challenges for the business, as the same licensing conditions for different types of events can result in excessive cost for staffing and other security measures.

Visitors to events usually come from Kingston, Twickenham or Surrey, and gaps in public transport and parking are a challenge.

‘Venues are scared of getting in trouble due to strict licensing conditions. There is a knock on effect: intensive checks at the door lead to long queues on the street, which can feel intimidating.’

- Banquet Records

Education

The Union of Kingston Students provides advice, sports clubs, societies and volunteering opportunities. In evenings, they organise talks, open mic nights, film screenings and club nights, and make use of the town centre for organised activities past 10pm.

There seems to be a trend emerging of more health and well-being conscious activities, as well as the search for an ‘experience’.

The Performing Arts Community Engagement (PACE) programme offers an inclusive platform on which students, staff, alumni and members of the local community come together through the performing arts.

PACE run a weekly evening choir for the local community and other events at the Rose Theatre, All Saints Church and St John Church. A challenge is identified as the lack of venues to be able to put on events and attract an audience.

The town centre feels very zoned: river, core and area around the cinema and night club. You don’t see any night-time activity in the core. - PACE

4.0 TOWN CENTRE BUSINESS SURVEY

Evening and night-time economy and activation

Across the different conversations, common themes have emerged that are described here.

Safety and support

Support programmes that are active in the town centre include support for the homeless by means of night shelters as well as street pastors that patrol the streets during the night. The Everyday Church as well as John Bunyan Baptist Church have a night shelter on different days of the week.

Street pastors, who are volunteers from local churches including St Peters Church in Norbiton, patrol in teams of men and women, usually from 10 p.m. to 4 a.m. on a Friday and Saturday night, and offer assistance to people in need. This includes helping homeless people to find a local shelter or assisting people who have had too much to drink.

Generally the town centre has been described as safe. However there appear to be reported instances where students feel uneasy when going home at night, or other age groups when passing by the long queues in front on the night club.

'The hours between 6-10:30pm are most difficult, then Kingston becomes a bit of a ghost town and a little intimidating for some people.'
- Rose Theatre

Lack of offer for young people

There seems to be a lack of offer for young people in Kingston Town Centre. An initial understanding from engagement to date that there is a lack of offer of activities for young people in the town centre has now been enforced by conversations with the different organisations.

The audience of the Rose Theatre for example is majoritively adults of the middle and upper middle classes, with it being difficult to attract young

people. Young people tend to go out of the borough for evening events and activities. This includes students, who usually live outside of Kingston Town Centre. If there is a lack of offer, they will either just go home or find activity elsewhere. In the town centre, students make up a high number of people and represent a key target and audience group.

A representative from the Student Union in Kingston has shared his view and experience that young people are looking for an 'experience' when they go out, something memorable. An example is that unions have hired virtual reality kits for events.

He further states that there is more of a health and well-being conscious in young people, this establishes itself for example in that gyms are well frequented. The offer should also be extended to further include possibilities for people from less affluent backgrounds. This could be in the form of more flexible social spaces, as described below.

'The university has a big pool of young creative students, who are looking for more 'alternative' places. Kingston is pretty good at catering for families, but not very good for young people.' - CIRKT

Lack of venues

A lack of smaller venues for between 150 and 200 people has been identified. This would offer the opportunity for Banquet Records to put on smaller concerts for instance. Creative Youth also aspire to host more events in smaller and more informal venues, such as vacant shops and pop-up locations. This could manifest itself in the shape of a mini festival, utilising otherwise empty facilities and enlivening the town centre. Examples elsewhere include the Fringe festival in Edinburgh, where indoor as well as outdoor spaces are transformed to host different types of performances.

Spaces for more spontaneous socialising also seem to be lacking in the town centre, along with more flexible and informal spaces.

Examples of such spaces elsewhere include the Box Park or Dinerama in Shoreditch and Croydon. These spaces combine an offer in food, shopping as well as informal socialising and allow for smaller performances, yoga classes, public screenings to be held.

Kingston University's new Town House building will include an open courtyard for people to engage, which seems like a key asset to utilise in the future.

'What would help are spaces where spontaneous socialising can happen.'
- Student Union

Barriers for activation

Barriers for evening and night-time activation include what was described as 'rigid' security and licensing regulations. This means that conditions are defined by the different venues, rather than by the type of event, which can result in over-staffing and over security measures such as CCTV which is expensive for the organiser. This might result in certain organisations not being able to put on as much events.

What is desired is a more flexible system, where the management has more discretion with regards to their checks and security.

Opening times of public parking has also been identified as a barrier for night-time activation, as it means that people who drive into town need to leave early. Further, the suggestion was made to introduce different tariffs for night-time parking, to encourage people who drive into town to stay later. Limited public transport provision during the night also demonstrates a barrier for night-time activation.

A 'hook' for Kingston Town Centre

The town centre is described as 'zoned': the river, the core, and the area around the Rotunda. The river edge seems to be relatively successful when the weather is nice in attracting people, including in the evenings. The core however is described as being a 'ghost town' after the shops close, whereas the area around the Rotunda benefits from the night club and cinema in the later hours.

'The town centre is dead when I do occasional late night shopping.'
- PACE

There needs to be a special 'hook' for the town centre, to activate it during the evening and night-time hours. This could be about offering more theatre experiences, expanding on the current offer from the Rose Theatre and transforming Kingston into a performance town.

There could also be a specific aim at younger people, in line with the stated desire for 'more than just going out to drink'. Also, direct links with restaurants could be made, in offering after show dinner possibilities. Currently this is very sparse, which means visitors from the Rose Theatre leave the town centre after seeing a show.

Overall, there are a number of different organisations that operate within the town centre, however a 'disconnect' was described between them, and a lack of 'spirit'. Streetscape activation with performance or iconic art as well as wayfinding could be utilised to help transform the town centre into a more holistic and conjoined area.

'I would like to see three theatres in the town centre, this would give Kingston more of an image as a performance place.' - Rose Theatre

Prosperity

Kingston Town Centre has a high economic value, first and foremost, due to the number of jobs it provides. Not including the large chains and focusing only on small and independent businesses as well as charities, each retail unit on average employed 6 to 7 people which is quite substantial,

In comparison with other town centres in London, employment opportunities within the town centre has a wider catchment, accommodating both local employees and those further living further afield. A high number of respondents commute over significant distances to work.

The retail trade sector is highly represented in Kingston Town Centre, which make it a prime shopping destination, however users desire more variety. The types of shops are relatively standard, little specialised and not directed to specific community groups.

Kingston Town Centre offers a high proportion of part-time employment which is seen as both an opportunity and a challenge. Part-time work can be indicative of precarious work opportunities, characterized by itinerant, low-pay and often insecure employment but also provides opportunities for first-time employment, Saturday jobs for youth and students, part-time work for elderly, and jobs for women who need flexible part time work.

Kingston Town Centre provide opportunities for both new and long standing businesses suggesting that the economic capacity of the street has the potential to be adaptive. However, the newly opened businesses are not contributing to the diversification of the town centre offer which remains dominated by the importance of the retail trade sector.

Longer established businesses tend to be found within the station and Richmond Road area. In comparison, all the other areas have a larger percentage of businesses that have only been established for up to 5 years.

Only one third of people working in the station and Richmond Road area make use of the town centre/high street, further highlighting severance between the area north of the station and the rest of the town centre.

In addition to the services provided by the core social infrastructure, some additional 'informal' services are provided by shops and public houses in addition to their core trade. This suggests that not only is the high street a critical piece of core infrastructure but also integral to 'soft' infrastructure networks found in shops and other services.

A large proportion of businesses help people by giving directions to local landmarks and amenities. This indicates there is an absence of intuitive way finding throughout the town centre.

People

Most of the surveyed users visit the town centre during the day only, indicating relatively poor night time uses.

The majority of respondents use the town centre primarily for retail, which remains a very significant reason for people to travel into the town centre.

Aside from shopping, the most commonly identified uses across the town centre are the compendium facilities - leisure, faith and library, and the use of the high street as a place to socialise. These uses are also notable as they relate to the social significance of the high street, both in terms of access to social and community infrastructure and in terms of opportunities for social contact.

Retail is the primary use of the town centre but is not what is valued the most. 65% of people stated that retail is their main use in the town centre, however only 34% of surveyed town centre users responded saying that they valued this the most.

People recognise the added-value of certain features of the town centre regardless of their own regularity of use. Others recognise the value that certain features of the town centre have for other people or to making a better high street. The identification of 'non-physical' elements of the high street represent a point of departure between use and value.

Almost one quarter of town centre users in Kingston would like to see the range of the current offer protected. Answers categorised as such included uses such as the cinema, open spaces, flower sellers, places to meet, spaces for community activities, the church, the museum, as well as the ancient market.

There is a recognised lack of offer for young people within the town centre. A higher proportion of seniors take part in local activities compared to adults or teenagers/young adults

The places of worship appear to serve an integral role in contributing to the social value found in the town centre, especially since there is a recognised lack of community centres in the local area. The audit has revealed that many of them offer additional social support services beyond religious activities.

There is a 'disconnect' between organisations operating in the town centre which could be improved by introducing more street activity and wayfinding to create a more holistic offer.

Place

A large majority of the users surveyed walk or cycle to the town centre (52%). This access profile underscores how local and easy to reach the town centre is for many users. This accessibility is closely linked to inclusivity, especially in relation to those with limited or impaired mobility, and highlights the crucial role that town centres have in enabling people to walk within the neighbourhoods in which they live.

A third of the surveyed users have been visiting the town centre for more than 20 years revealing a relatively strong trend for long-standing relationships with the town centre. However, new visitors are also significant as 35% of the surveyed users are visiting the town centre for less than 5 years.

An important number of respondents stated that they perceived no to little recent changes in the area.

When considering length of engagement with the street, it does appear that those visiting the high street for an extended time (10 years or more) have a proportionally more negative view of change compared with those that had been visiting for less time.

The majority of respondents perceived change regarding the streetscape as having a positive impact on the town centre with many users in particular reporting the cycling facilities, new footpaths and crossings as improvements. However, roadworks have been highly reported as causing nuisance and increasing traffic while some users have also expressed negative comments regarding poor wayfinding and lack of signage in the town centre.

Changes that have affected the 'town centre offer' are seen unanimously as negative. Users regret the lack of diversity in the town centre and that the new offer is exclusively geared towards retail and therefore consumption.

Desired changes identified by users across all age groups referred significantly to non-retail features of the high street, reinforcing the value of the high street beyond its retail offer.

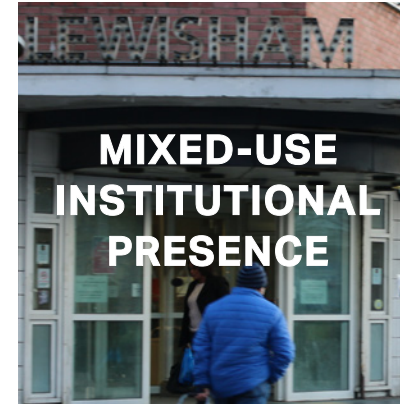
Demand for an increased cultural offer as well as a food and drink offer is expressed by adult users, specifically identifying the night time offer as a desirable feature of the high street. A desire for 'spontaneous' socialising space along with a wider range of venues which cater for a range of people and ages, has been highlighted.

6.0 KINGSTON'S SOCIAL VALUE DRIVERS

Current strengths

The research in 'High Streets for All' identified a wide range of high street functions that provide immense social value and should be protected and enhanced through policy, advocacy and investment. These are described and summarised here.

Findings in Kingston Town Centre are measured against this set of values, identifying where Kingston is 'doing well' and where key points for improvements should be made.



High Streets for All

High streets offer accessible entry points to enterprise and employment. They offer opportunities across education levels, for individuals across all ages, and support diverse tenure options for traders.

High streets contain a notable range of formal and informal religious spaces. These both attend to specific religious needs, and more general features of well-being such as sports classes and nursery schools.

High streets are hosts to accessible institutions, and often offer a spectrum of services (including pharmacies, libraries, community centres).

High streets are routes that connect people to places, both on the street and to beyond. Buses, tubes and trains links enhance the connectivity of the area, increasing the thresholds of support and the viability of activities on the street.

High streets offer the chance to engage in public life, to get out of the home and be surrounded by people without having a specific purpose.

In Kingston

The strategy should create opportunities by introducing new workspace to broaden ways into work for a diverse range of people, building upon its offer of flexible part time work.

The strategy should support places of worship in the town centre including the United Reformed Church and Quaker Centre which offer vital social value and community services by providing more adjacent community spaces.

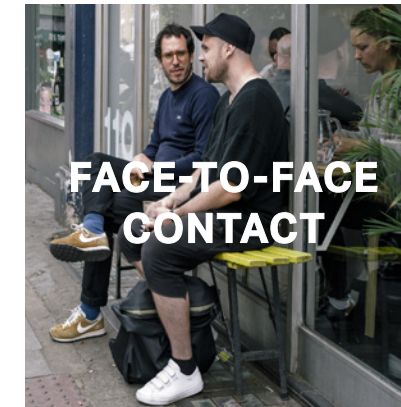
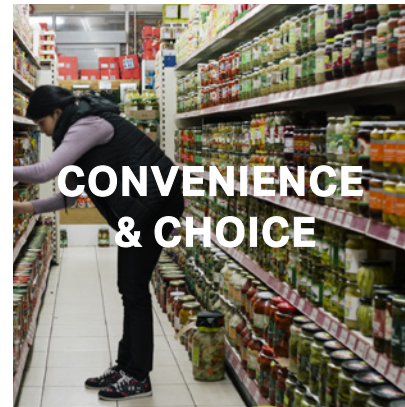
The strategy should recognise the social value Kingston University and other local institutions already do, and have the potential to, bring to the town centre by creating spaces which will increase their presence and enable them to share their services more widely.

The strategy should further enhance connectivity across the town centre, building upon its reputation of being easy to walk everywhere. Encouraging conviviality and contact should be part of delivering exemplary healthy streets.

The strategy should consider those users who visit the town centre simply to experience public life by ensuring streets and spaces including Clarence Street and the Ancient Market Place allow for people to spend time without spending money (or giving any perception they are unwelcome if not spending).

6.0 KINGSTON'S SOCIAL VALUE DRIVERS

How Kingston could
do better



High Streets for All

High streets provide a wide offer of choice through independent shops, eateries, organisations and workspaces, and provide conveniently located activities and services.

Shops and other workspaces on high streets are as recent as they are long-standing. High streets offer multiple economic opportunities for businesses interested in catering to existing communities and new comers both.

Extended operating hours of particular high street uses and services have value for both Londoners and businesses as well as contributing to safer night travel.

One-to-one social contact is sustained by the opportunity for spontaneous and everyday conversations, supported by familiar spaces and people.

The high street is perceived as a first point of support, fulfilling an array of functions. These include medical advice (e.g. pharmacies), translations, advice on local area and directions.

In Kingston

The strategy should address the lack of choice and diversity within Kingston's town centre offer by providing spaces for activities which contribute more social value to its users (this might mean landowners specifically foregoing retail rent in order to achieve other aims).

The strategy should seek to provide adaptable spaces which provide local people and Kingston University graduates with new economic opportunities in order to better support the retention of local talent.

The strategy should address the lack of activity in the evening to support the local economy and provide a safer area for people to spend time and travel through at all times of the day, including 6pm - 6am.

The strategy should look for opportunities to increase local participation within the town centre, supporting local networks and providing better spaces for people to socialise. This should prioritise the town centre as a space where people can easily come together.

The strategy should make streets and spaces work harder to provide information and support for citizens, whilst also celebrating the role of local businesses in providing support for users of the town centre.

WE MADE THAT LLP
Unit 21 Tower Workshops
58 Riley Road
London SE1 3DG

T +44 (0)20 7252 3400
www.wemadethat.co.uk
studio@wemadethat.co.uk

We Made That LLP is
registered in England &
Wales. Reg no. OC367789