



Surbiton, New Malden and Tolworth Comparison & Convenience Catchment Statistics

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Overview

- Kingston Council have commissioned Experian to analyse the Comparison and Convenience goods catchments for Surbiton, New Malden and Tolworth, all within the Kingston area.
- Surbiton has approximately 206,000 sq.ft. of Comparison and Convenience floorspace. Experian estimate a weighted Comparison expenditure within the catchment (i.e. that spend captured by Surbiton), of £24.4 million and a weighted Convenience expenditure of £58.26 million.
- New Malden has approximately 218,000 sq.ft. of Comparison and Convenience floorspace. Experian estimate a weighted Comparison expenditure within the catchment (i.e. that spend captured by New Malden), of £41.7 million and a weighted Convenience expenditure of £21.66 million.
- Tolworth has approximately 121,000 sq.ft. of Comparison and Convenience floorspace. Experian estimate a weighted Comparison expenditure within the catchment (i.e. that spend captured by Tolworth), of £23.2 million and a weighted Convenience expenditure of £49.52 million.
- Due to close proximity and overlap of catchments, all the centres display similar characteristics in terms of Mosaic and Census demographics. The towns display affluent catchments typical of their suburban location, within commuting distance to Central London.



Surbiton, New Malden and Tolworth Comparison & Convenience Catchment Statistics

1.0 Surbiton

Surbiton Overview

Comparison Offer

- Surbiton does not have a particularly strong comparison goods offer, although there are some multiples present such as Boots, Clarks and Blockbuster.
- Clothing and Footwear accounts for just 1% of floorspace currently. There is a high proportion of floorspace within the Miscellaneous category – this includes charity shops and vacant outlets.

Multiple Flag	Kingston upon Thames	New Malden	Surbiton	Tolworth
Multiple	64%	44%	42%	30%
Non-Multiple	36%	56%	58%	70%

Convenience Offer

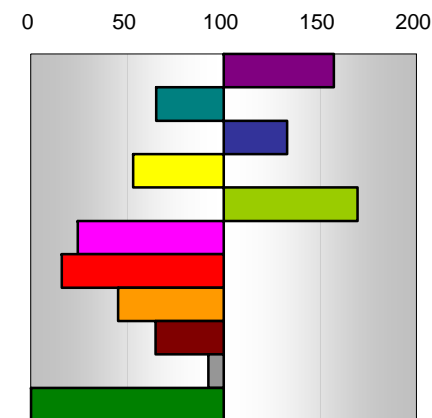
- 23% of Surbiton's floorspace is accounted for by food and supermarket provision, which is broadly in line with Tolworth in terms of percentage, but a higher amount of actual floorspace.
- Key convenience stores include Marks and Spencer Simply Food, Somerfield, Majestic Wine Warehouse, Sainsburys and Waitrose, providing a very strong mix.

Report Category	Kingston upon Thames	New Malden	Surbiton	Tolworth
Books/Recorded Media	2%	2%	1%	3%
Department & Variety Stores	26%	5%	1%	1%
DIY & Home Improvement	1%	0%	0%	0%
Electrical	3%	1%	1%	2%
Fashion / Clothing - Childrens Clothing	1%	0%	0%	1%
Fashion / Clothing - General Clothing	8%	1%	1%	0%
Fashion / Clothing - Ladieswear	6%	2%	0%	0%
Fashion / Clothing - Menswear	2%	0%	0%	0%
Food/Supermarket	5%	13%	23%	22%
Footwear	1%	2%	0%	0%
Gifts/Greeting Cards	1%	4%	1%	1%
Health/Beauty	3%	16%	8%	6%
Housewares	5%	6%	7%	5%
Jewellery, Watches & Silver	1%	1%	0%	0%
Leisure Services	11%	8%	8%	19%
Miscellaneous	5%	10%	13%	10%
Newsagents	2%	1%	2%	2%
Restaurant/Fast Food	8%	11%	12%	10%
Services	6%	17%	20%	17%
Toys, Games & Hobbies	3%	0%	0%	1%

Surbiton's Comparison Catchment Mosaic Profile

- Surbiton's current catchment area is dominated by the four key Mosaic UK Groups:
 - Symbols of Success (26%)
 - Suburban Comfort (25%)
 - Urban Intelligence (22%)
 - Happy Families (7%)
- Relative to South East averages this area displays a very affluent population, over-indexing on the most affluent Groups, Symbols of Success, Suburban Comfort and Urban Intelligence.

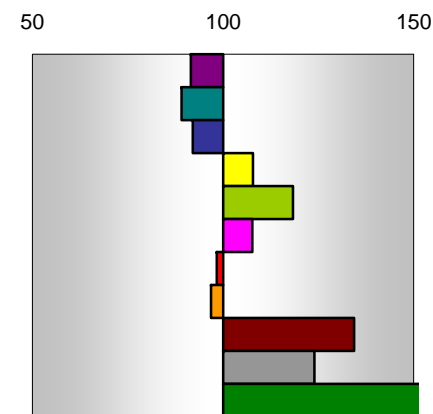
Mosaic Lifestyle Groups	Surbiton	%	London & South East	%	Index
A Symbols of Success	68,337	26.01	3,130,603	16.55	157
B Happy Families	18,662	7.10	2,062,556	10.90	65
C Suburban Comfort	64,732	24.64	3,506,388	18.54	133
D Ties of Community	16,973	6.46	2,301,726	12.17	53
E Urban Intelligence	58,680	22.33	2,492,722	13.18	169
F Welfare Borderline	4,375	1.67	1,293,916	6.84	24
G Municipal Dependency	598	0.23	266,832	1.41	16
H Blue Collar Enterprise	11,394	4.34	1,807,908	9.56	45
I Twilight Subsistence	3,272	1.25	364,139	1.93	65
J Grey Perspectives	15,700	5.98	1,227,051	6.49	92
K Rural Isolation	6	0.00	462,378	2.44	0
	262,729	100	18,916,219	100	



Surbiton's Mosaic Profile 2008 vs 2003

- The overall population has increased within the last five years in Surbiton's current catchment area, from 251,029 to 262,729, an increase of 4.66%.
- In terms of the Mosaic profile, there has been a slight decrease in both the number and percentage of the more affluent groups Symbols of Success, Happy Families and Suburban Comfort, but increases in the groups Urban Intelligence and Grey Perspectives.

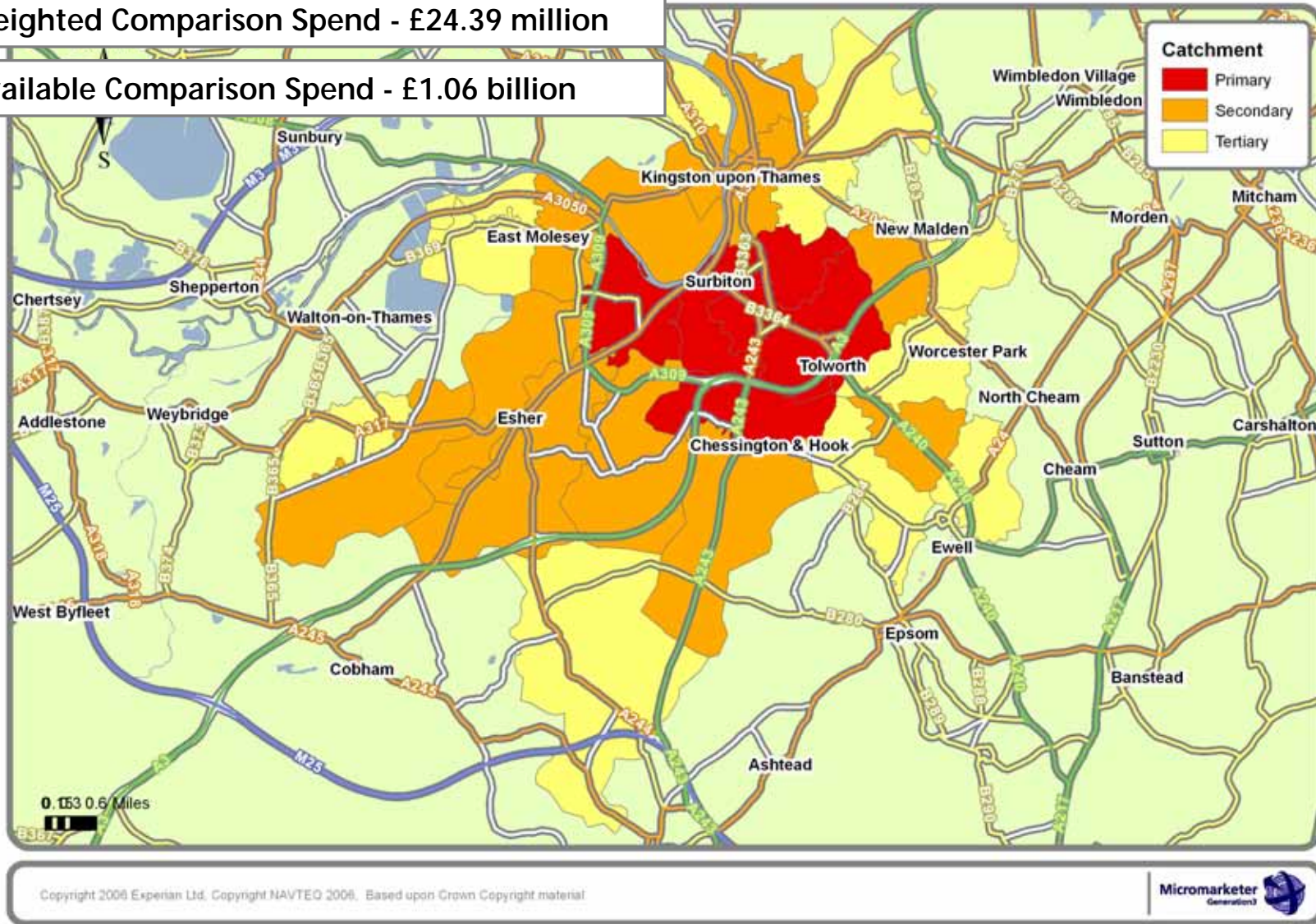
Mosaic Lifestyle Groups	2008 Pop	%	2003 Pop	%	Index 2008 - 2003
A Symbols of Success	68,337	26.0%	71,283	28.4%	92
B Happy Families	18,662	7.1%	20,009	8.0%	89
C Suburban Comfort	64,732	24.6%	67,203	26.8%	92
D Ties of Community	16,973	6.5%	15,042	6.0%	108
E Urban Intelligence	58,680	22.3%	47,361	18.9%	118
F Welfare Borderline	4,375	1.7%	3,882	1.5%	108
G Municipal Dependency	598	0.2%	581	0.2%	98
H Blue Collar Enterprise	11,394	4.3%	11,238	4.5%	97
I Twilight Subsistence	3,272	1.2%	2,327	0.9%	134
J Grey Perspectives	15,700	6.0%	12,100	4.8%	124
K Rural Isolation	6	0.0%	3	0.0%	191
	262,729	100.0%	251,029	100.0%	



Surbiton's Comparison Catchment Area

Weighted Comparison Spend - £24.39 million

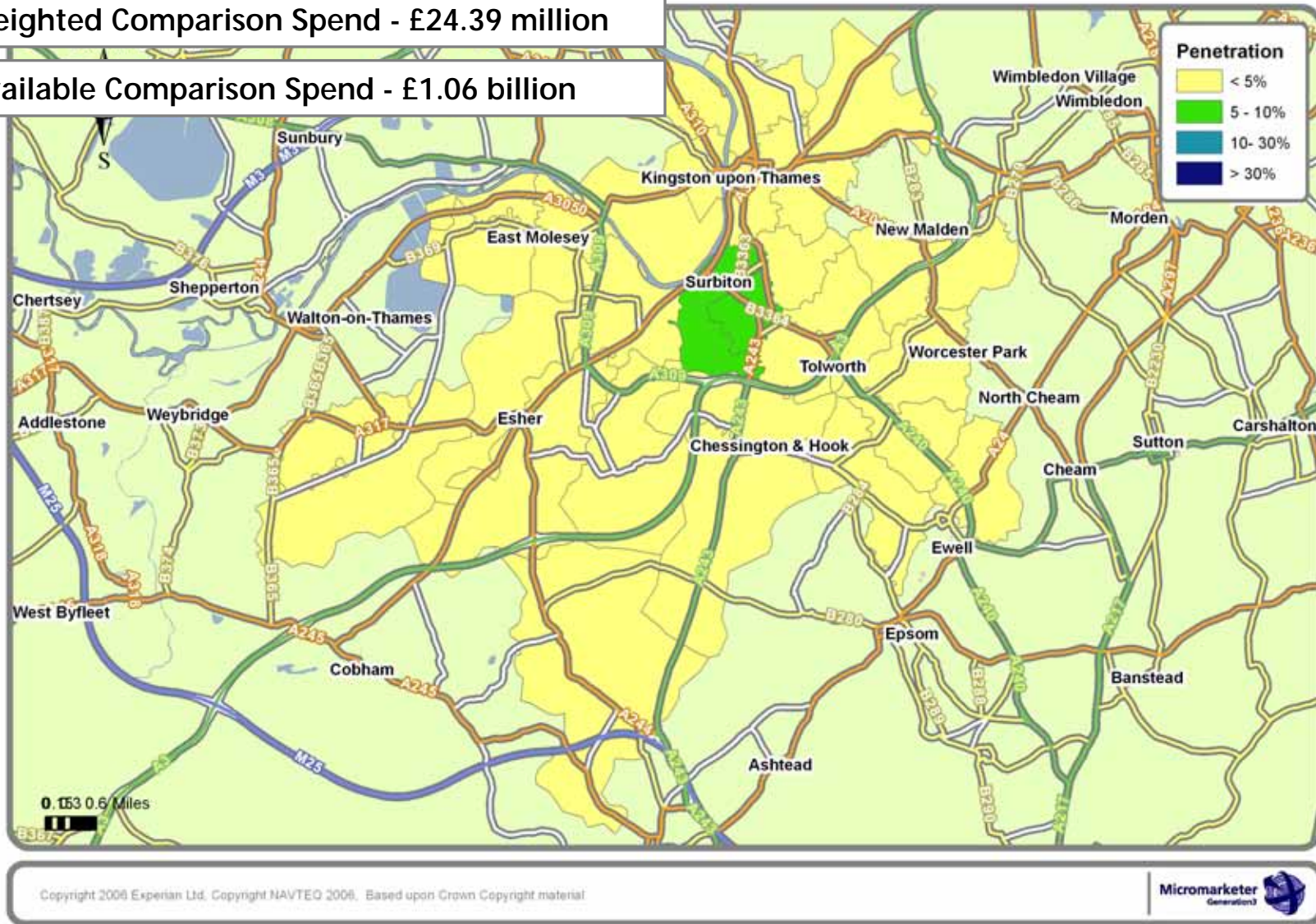
Available Comparison Spend - £1.06 billion



Surbiton's Comparison Catchment Area

Weighted Comparison Spend - £24.39 million

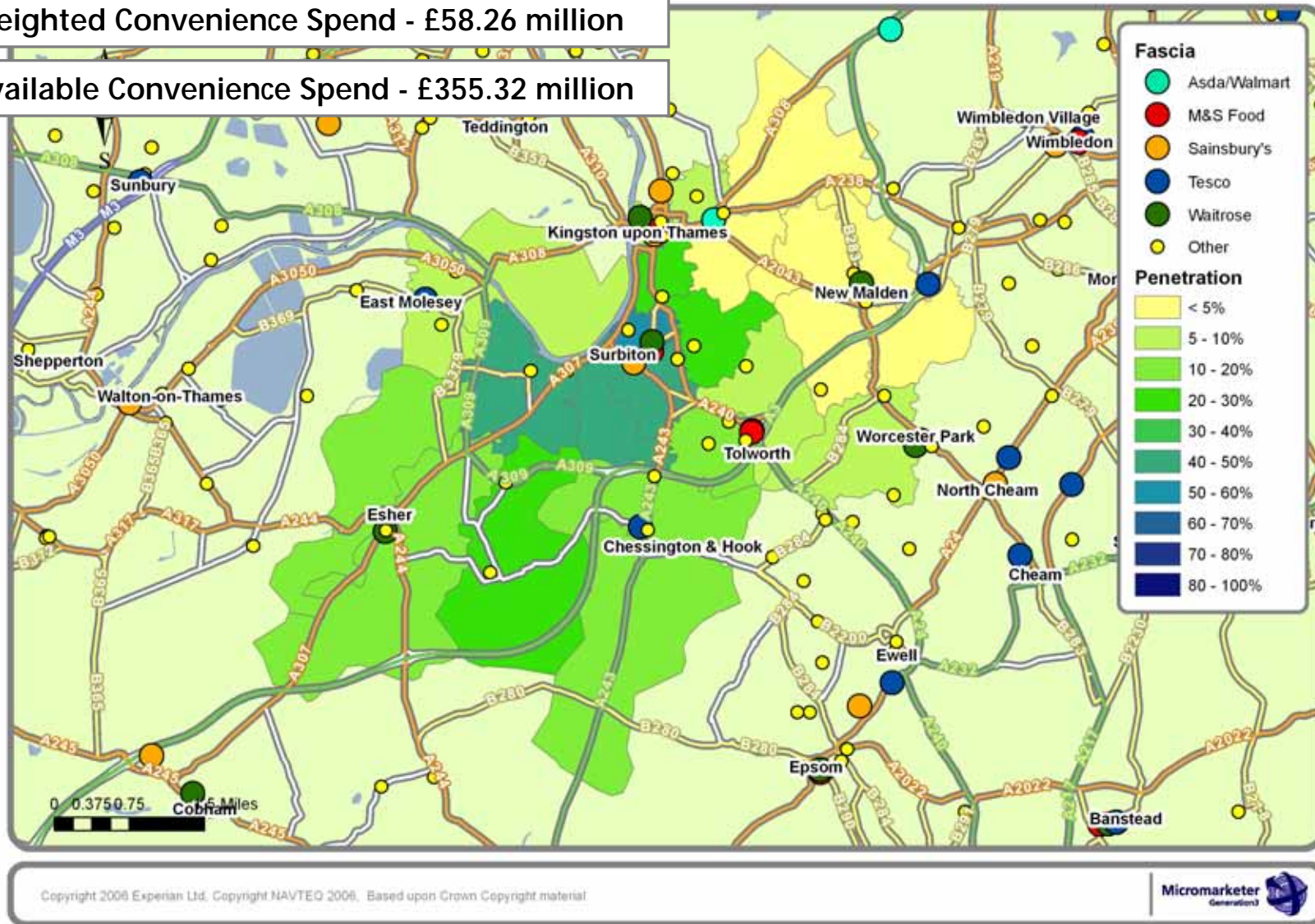
Available Comparison Spend - £1.06 billion



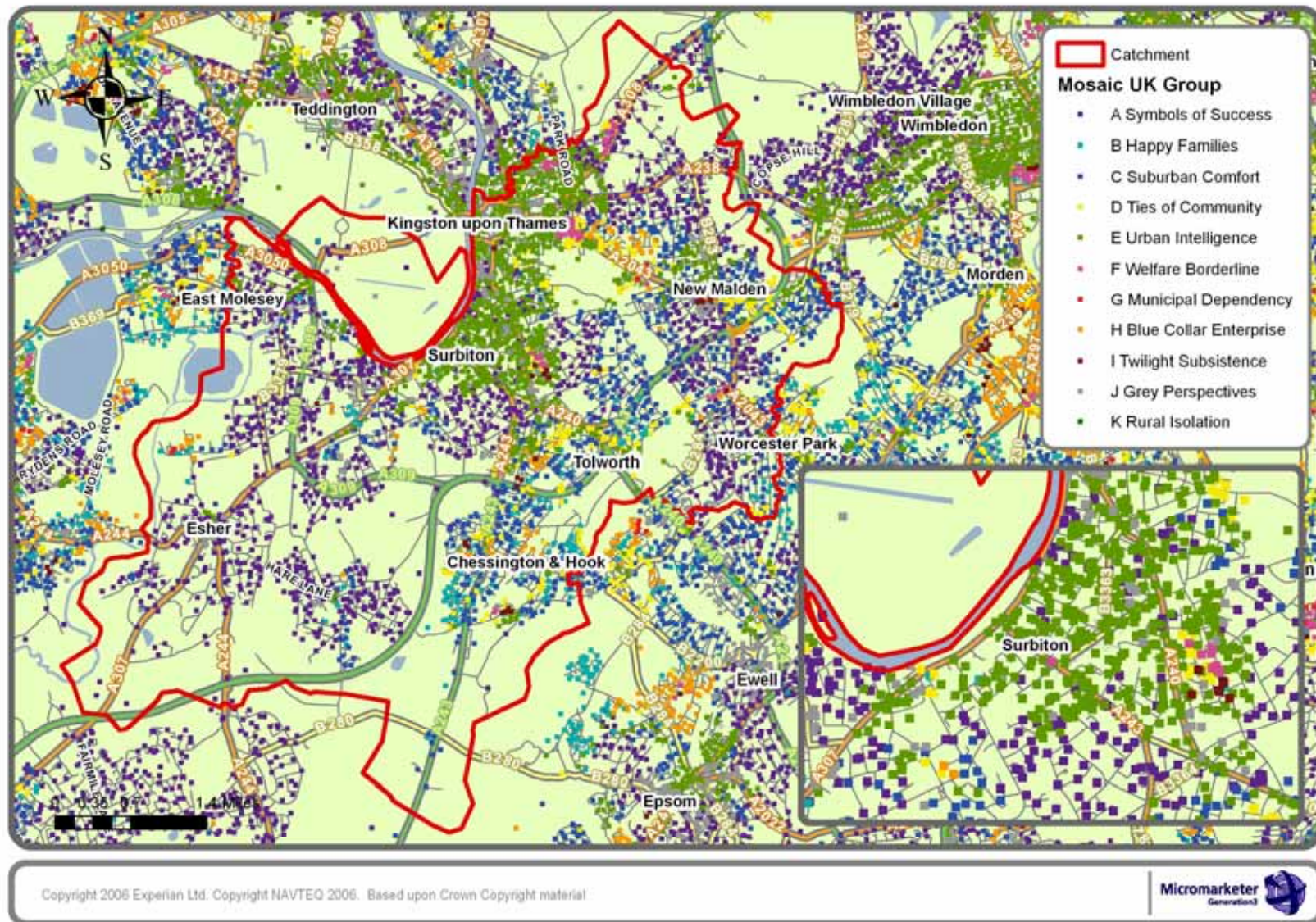
Surbiton's Convenience Catchment Area

Weighted Convenience Spend - £58.26 million

Available Convenience Spend - £355.32 million



Surbiton Mosaic Map



Surbiton Convenience and Comparison Leakage

- Surbiton currently captures a very low proportion of market share within its comparison spend catchment, just 2.3%, equating to £24.39 million in expenditure. The main competition comes from much larger towns such as Kingston upon Thames (46.3% catchment market share), Sutton (7.0% catchment market share), and Epsom (6.9% market share) with the London West End capturing approximately 6.1% of catchment market share.
- Surbiton proves to be much stronger in terms of its convenience offer than comparison, commanding 16.4% of market share from its convenience catchment. Again Kingston is the main competition, followed by the Shannon Corner Retail Park, which captures approximately 15.0% of catchment market share.

Comparison Spend Leakage

Centre	Weighted Spend	%
Kingston upon Thames	£488,549,168	46.3%
Sutton	£73,390,386	7.0%
Epsom	£72,809,002	6.9%
London West End	£64,224,844	6.1%
Wimbledon	£44,906,375	4.3%
Guildford	£29,293,651	2.8%
Richmond	£28,138,085	2.7%
Hounslow	£26,326,759	2.5%
Surbiton	£24,391,290	2.3%
White City	£20,268,357	1.9%
New Malden	£18,003,522	1.7%
Tolworth	£16,863,847	1.6%
Putney	£15,288,954	1.4%
Walton-on-Thames	£13,192,455	1.2%
Tooting	£12,149,631	1.2%
Croydon	£11,292,823	1.1%
Staines	£10,207,530	1.0%
Merton - Priory Retail Park	£9,945,124	0.9%
Other	£76,353,880	7.2%
Total	£1,055,595,682	100.0%

Convenience Spend Leakage

PlanName	Total	%
Kingston upon Thames (Waitrose, Sainsburys, Lidl)	£60,832,616	17.1%
Surbiton (Sainsburys)	£58,257,795	16.4%
New Malden - Shannon Corner Retail Park (Tesco Extra)	£53,425,739	15.0%
Tolworth (Marks & Spencer)	£43,218,992	12.2%
London Road, Kingston upon Thames (Asda)	£29,860,371	8.4%
New Malden (Waitrose)	£20,419,874	5.7%
Epsom - Kiln Lane Retail Park	£11,079,726	3.1%
Lower Ham Road, Hampton Wick	£11,796,055	3.3%
Esher	£9,912,963	2.8%
Roehampton Vale, Wandsworth	£9,460,667	2.7%
Teddington	£7,525,773	2.1%
Chessington & Hook	£6,831,312	1.9%
North Cheam (Sainsburys)	£6,073,632	1.7%
Leatherhead Road, Hook, Chessington	£5,558,814	1.6%
Feltham - Apex Retail Park	£5,055,300	1.4%
Walton-on-Thames	£4,007,612	1.1%
Twickenham	£3,267,793	0.9%
Merton - Priory Retail Park	£3,274,329	0.9%
Other	£5,459,217	1.5%
Total	£355,318,579	100%

Surbiton Convenience and Comparison Spending

- Surbiton centre is estimated to capture £58.26 million of the available convenience spend within the convenience catchment area. This equates to 16.4% market share of the catchment area, reinforced by the strong convenience offer within the town.
- The share of comparison spend is much lower, reflecting both the relatively poor offer, and the strength of the competing centres, such as Kingston upon Thames. Surbiton is predicted to receive approximately £3.2 million of clothing spend, out of an available clothing spend of £136.1 million.
- Other key categories include Homewares, which contributes £4.2 million out of an available £180.1 million, and Electrical Goods spend, which accounts for £1.61 million out of an available £70.7 million.

Category	Available Spend	Weighted Spend
Convenience Spend	£355.32	£58.26

Category	Available Spend	Weighted Spend
Comparison Expenditure	£1,055.60	£24.39
<u>Key Comparison Categories:</u>		
Clothing	£136.12	£3.20
Footwear	£29.54	£0.70
Jewellery, Clocks & Watches	£13.50	£0.31
Homewares	£180.11	£4.15
Toys, Games & Hobbies	£59.54	£1.34
Health & Beauty	£106.89	£2.47
Electrical	£70.68	£1.61
Books, Stationery & Recorded Media	£44.03	£1.04



Surbiton, New Malden and Tolworth Comparison & Convenience Catchment Statistics

2.0 New Malden

New Malden Overview

Comparison Offer

- New Malden has the strongest Clothing and Footwear offer of the three towns, with 5% of floorspace accounted for within these categories. Retailers include Bon Marche, QS and Shoe Express.
- New Malden has 16% of retail floorspace attributed to Health and Beauty provision. This includes Boots, Superdrug, and a number of hair salons such as Essensuals.
- 44% of New Malden stores consist of multiples. Comparison multiples include Birthdays, Dreams and F Hinds.

Multiple Flag	Kingston upon Thames	New Malden	Surbiton	Tolworth
Multiple	64%	44%	42%	30%
Non-Multiple	36%	56%	58%	70%

Convenience Offer

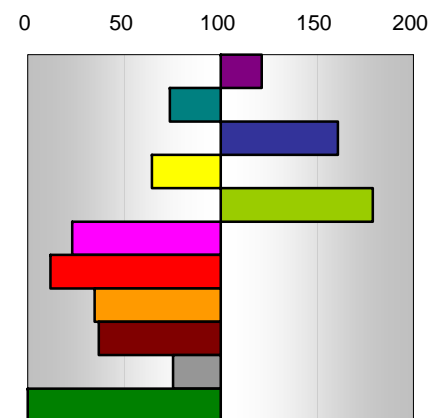
- New Malden has a fairly strong convenience offer, with a range of price points, including Iceland, Somerfield and Waitrose, and Lidl, although convenience floorspace only accounts for 13% of floorspace within the town.
- There are also a variety of smaller convenience stores such as Bakers Oven and Mini Stop.

Report Category	Kingston upon Thames	New Malden	Surbiton	Tolworth
Books/Recorded Media	2%	2%	1%	3%
Department & Variety Stores	26%	5%	1%	1%
DIY & Home Improvement	1%	0%	0%	0%
Electrical	3%	1%	1%	2%
Fashion / Clothing - Childrens Clothing	1%	0%	0%	1%
Fashion / Clothing - General Clothing	8%	1%	1%	0%
Fashion / Clothing - Ladieswear	6%	2%	0%	0%
Fashion / Clothing - Menswear	2%	0%	0%	0%
Food/Supermarket	5%	13%	23%	22%
Footwear	1%	2%	0%	0%
Gifts/Greeting Cards	1%	4%	1%	1%
Health/Beauty	3%	16%	8%	6%
Housewares	5%	6%	7%	5%
Jewellery, Watches & Silver	1%	1%	0%	0%
Leisure Services	11%	8%	8%	19%
Miscellaneous	5%	10%	13%	10%
Newsagents	2%	1%	2%	2%
Restaurant/Fast Food	8%	11%	12%	10%
Services	6%	17%	20%	17%
Toys, Games & Hobbies	3%	0%	0%	1%

New Malden's Comparison Catchment Mosaic Profile

- New Malden's current catchment area is dominated by the four key Mosaic UK Groups:
 - Suburban Comfort (30%)
 - Urban Intelligence (24%)
 - Symbols of Success (20%)
 - Happy Families (8%)
- Relative to South East averages this area displays a very affluent population, over-indexing on the most affluent Groups, Symbols of Success, Suburban Comfort and Urban Intelligence.

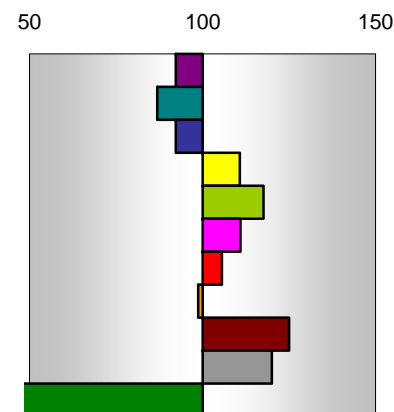
Mosaic Lifestyle Groups	New Malden	%	London & South East	%	Index
A Symbols of Success	60,334	20.07	3,130,603	16.55	121
B Happy Families	24,134	8.03	2,062,556	10.90	74
C Suburban Comfort	89,636	29.82	3,506,388	18.54	161
D Ties of Community	23,566	7.84	2,301,726	12.17	64
E Urban Intelligence	70,884	23.58	2,492,722	13.18	179
F Welfare Borderline	4,755	1.58	1,293,916	6.84	23
G Municipal Dependency	503	0.17	266,832	1.41	12
H Blue Collar Enterprise	9,961	3.31	1,807,908	9.56	35
I Twilight Subsistence	2,134	0.71	364,139	1.93	37
J Grey Perspectives	14,690	4.89	1,227,051	6.49	75
K Rural Isolation	0	0.00	462,378	2.44	0
	300,597	100	18,916,219	100	



New Malden's Mosaic Profile 2008 vs 2003

- The overall population has increased within the last five years in New Malden's current catchment area, from 294,721 to 300,597, an increase of 1.99%.
- In terms of the Mosaic profile, there has been a slight decrease in both the number and percentage of the more affluent groups Symbols of Success, Happy Families and Suburban Comfort, but a good increase in Urban Intelligence – young, relatively affluent city workers and students.

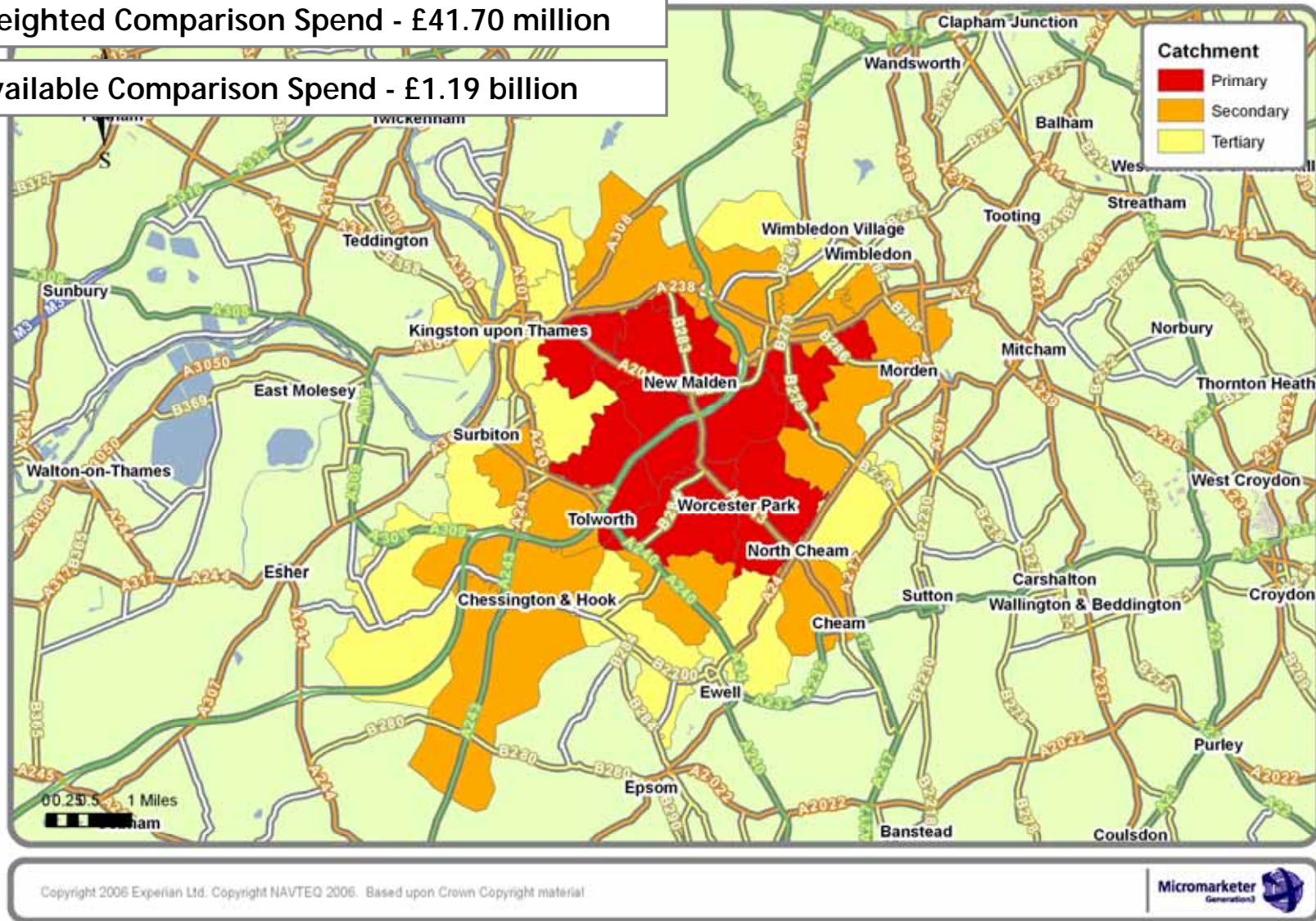
Mosaic Lifestyle Groups	2008 Pop	%	2003 Pop	%	Index 2008 - 2003
A Symbols of Success	60,334	20.1%	64,096	21.7%	92
B Happy Families	24,134	8.0%	27,240	9.2%	87
C Suburban Comfort	89,636	29.8%	95,217	32.3%	92
D Ties of Community	23,566	7.8%	20,849	7.1%	111
E Urban Intelligence	70,884	23.6%	59,090	20.0%	118
F Welfare Borderline	4,755	1.6%	4,202	1.4%	111
G Municipal Dependency	503	0.2%	467	0.2%	106
H Blue Collar Enterprise	9,961	3.3%	9,892	3.4%	99
I Twilight Subsistence	2,134	0.7%	1,673	0.6%	125
J Grey Perspectives	14,690	4.9%	11,995	4.1%	120
K Rural Isolation	0	0.0%	0	0.0%	N/A
	300,597	100.0%	294,721	100.0%	



New Malden's Comparison Catchment Area

Weighted Comparison Spend - £41.70 million

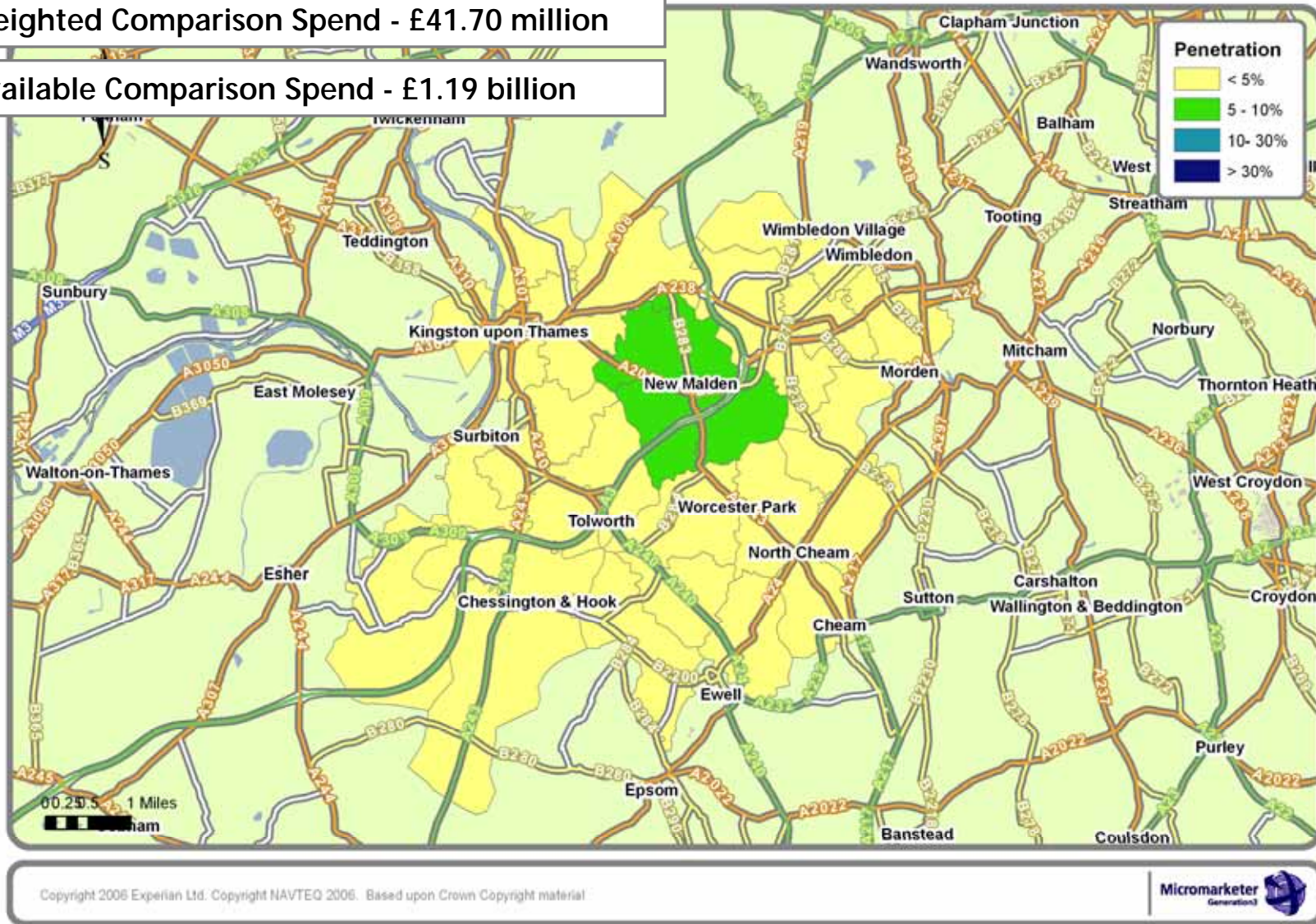
Available Comparison Spend - £1.19 billion



New Malden's Comparison Catchment Area

Weighted Comparison Spend - £41.70 million

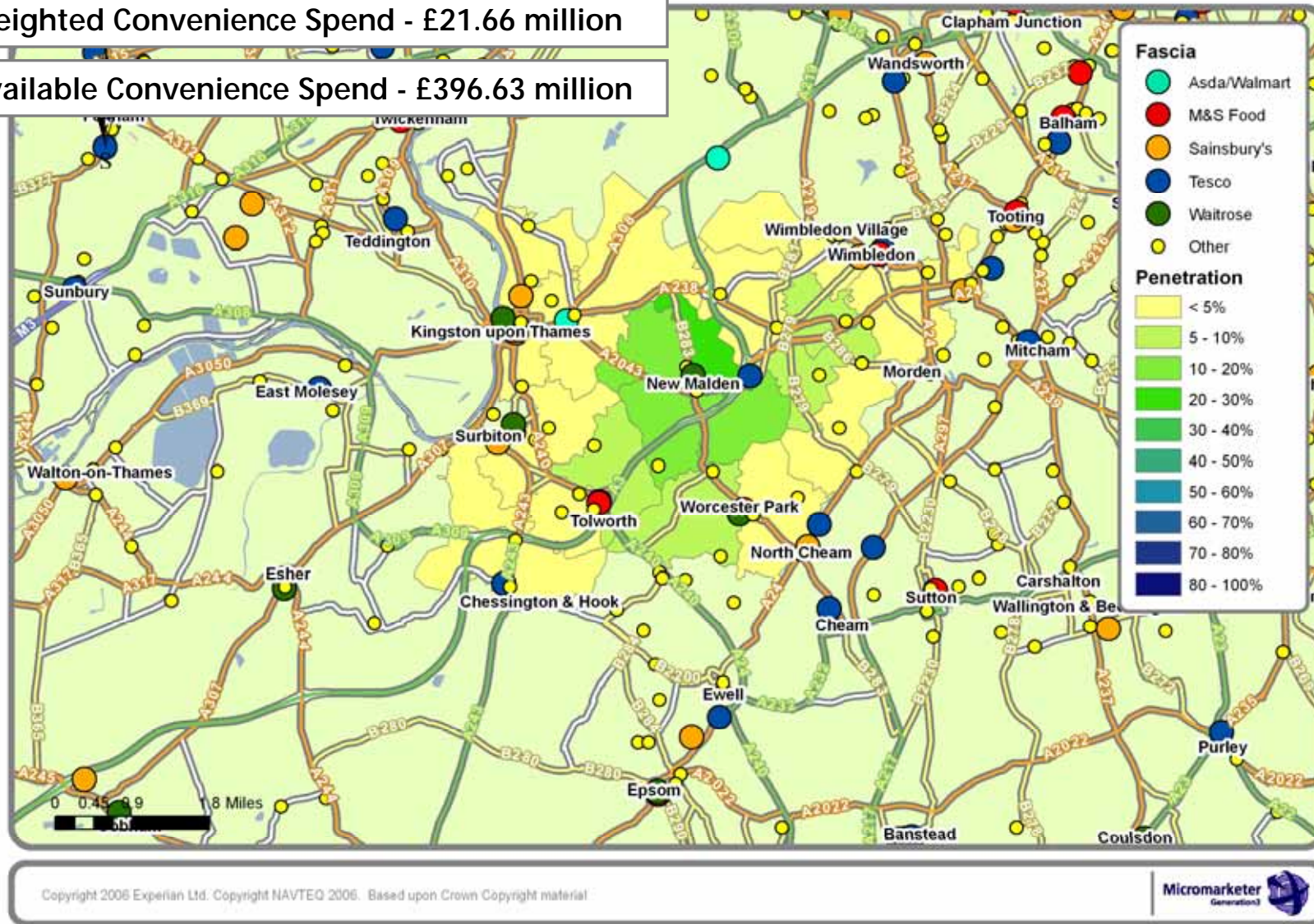
Available Comparison Spend - £1.19 billion



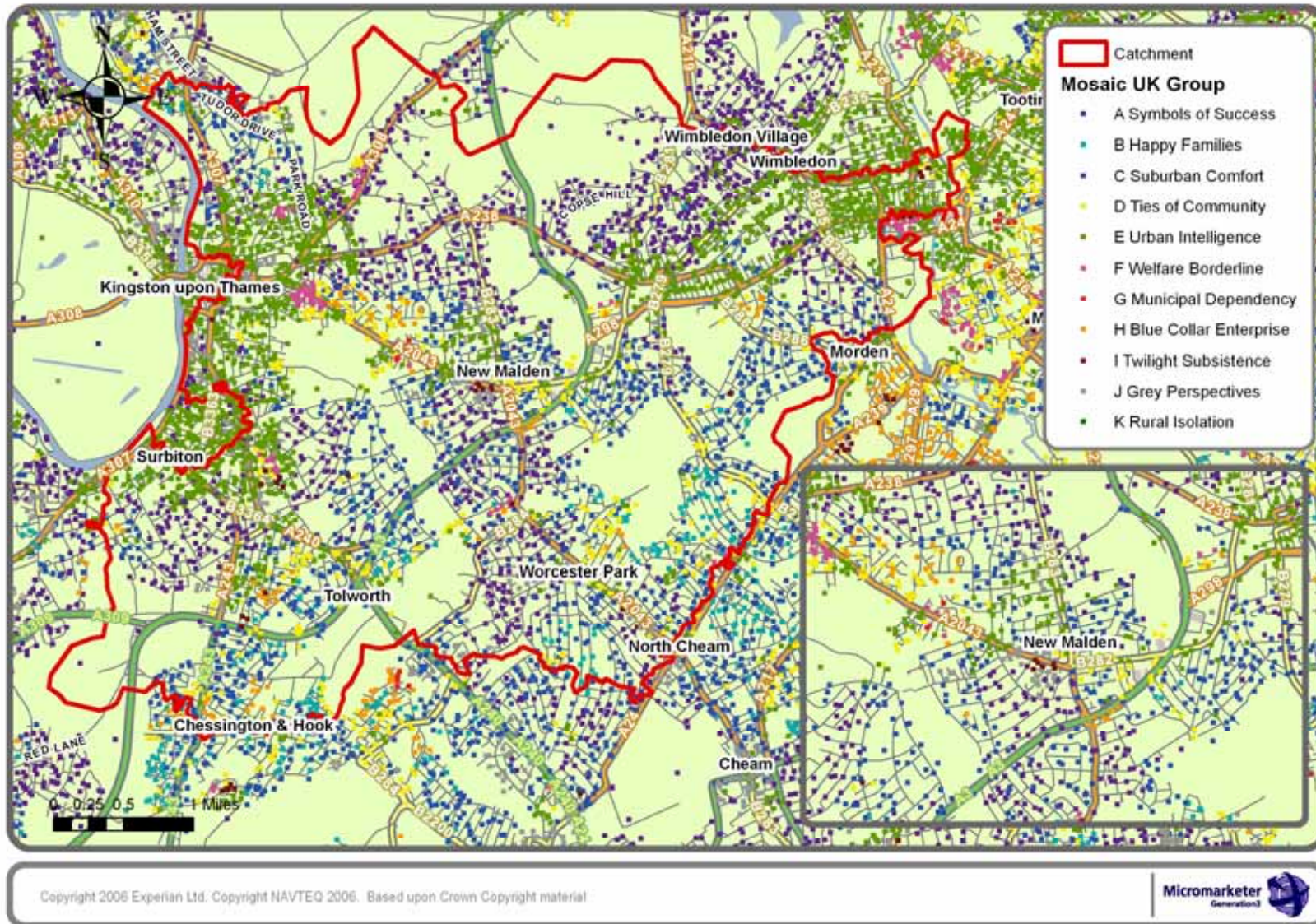
New Malden's Convenience Catchment Area

Weighted Convenience Spend - £21.66 million

Available Convenience Spend - £396.63 million



New Malden Mosaic Map



New Malden Convenience and Comparison Leakage

- New Malden is estimated to receive a 3.5% market share of its comparison goods catchment – approximately £41.7 million of spend out of £1.19 billion available. Again the key competition comes from Kingston upon Thames with 37.8% market share, capturing £449.0 million of the available spend within the catchment. Sutton, Wimbledon and London West End take a combined spend of £308.0 million, 25.9% of market share within New Malden’s catchment.
- New Malden’s convenience offer is fairly strong, however there is strong competition nearby, from Shannon Corner Retail Park, and Kingston upon Thames. New Malden is estimated to receive a 5.5% market share or £21.66 million.

Comparison Spend Leakage

Centre	Weighted Spend	%
Kingston upon Thames	£449,047,505	37.8%
Sutton	£120,903,339	10.2%
Wimbledon	£105,468,888	8.9%
London West End	£81,605,455	6.9%
Epsom	£79,683,538	6.7%
New Malden	£41,702,600	3.5%
Tooting	£33,716,819	2.8%
Merton - Priory Retail Park	£28,473,007	2.4%
Croydon	£28,335,587	2.4%
White City	£27,593,205	2.3%
Putney	£25,057,964	2.1%
Richmond (London)	£23,362,062	2.0%
Croydon - Purley Way	£19,518,101	1.6%
Tolworth	£17,616,336	1.5%
Surbiton	£17,387,049	1.5%
Hounslow	£15,689,758	1.3%
Guildford	£14,563,565	1.2%
Clapham Junction	£11,820,928	1.0%
Other	£46,858,676	3.9%
Total	£1,188,404,384	100.0%

Convenience Spend Leakage

Centre	Weighted Spend	%
New Malden - Shannon Corner Retail Park (Tesco Extra)	£68,388,276	17.2%
Kingston upon Thames (Waitrose, Sainsburys, Lidl)	£49,960,075	12.6%
Tolworth (Marks & Spencer)	£32,775,428	8.3%
Surbiton (Sainsburys)	£32,017,633	8.1%
London Road, Kingston upon Thames (Asda)	£29,870,099	7.5%
North Cheam (Sainsburys)	£23,180,650	5.8%
Wimbledon	£21,750,613	5.5%
New Malden (Waitrose)	£21,658,282	5.5%
Merton - Priory Retail Park	£18,717,657	4.7%
Roehampton Vale, Wandsworth, London Sw15	£14,222,967	3.6%
Epsom - Kiln Lane Retail Park	£11,823,374	3.0%
Lower Ham Road, Hampton Wick	£10,731,395	2.7%
Morden	£10,071,252	2.5%
Tooting	£6,116,994	1.5%
Mitcham	£5,309,047	1.3%
Worcester Park	£3,533,981	0.9%
Chessington & Hook	£2,662,958	0.7%
Cheam	£2,662,248	0.7%
Other	£31,181,002	7.9%
Total	£396,633,933	100%

New Malden Convenience and Comparison Spending

- New Malden receives approximately £21.66 million out of an available £396.63 million convenience spend, representing a 5.5% market share.
- £41.7 million of total comparison expenditure is weighted towards New Malden, of an available £1.19 billion. Key categories within this include Clothing, of which New Malden captures £5.69 million of an available £161.4 million, Health & Beauty, of which New Malden captures £4.3 million of an available £120.7 million, and Books, Stationery and Recorded Media, of which New Malden captures £1.8 million of an available £50.2 million.

Category	Available Spend	Weighted Spend
Convenience Spend	£396.63	£21.66

Category	Available Spend	Weighted Spend
Comparison Expenditure	£1,188.40	£41.70
<u>Key Comparison Categories:</u>		
Clothing	£161.42	£5.69
Footwear	£35.51	£1.25
Jewellery, Clocks & Watches	£14.59	£0.52
Homewares	£202.22	£7.10
Toys, Games & Hobbies	£64.29	£2.24
Health & Beauty	£120.72	£4.25
Electrical	£77.30	£2.71
Books, Stationery & Recorded Media	£50.15	£1.76



Surbiton, New Malden and Tolworth Comparison & Convenience Catchment Statistics

3.0 Tolworth

Tolworth Overview

Comparison Offer

- Tolworth has the lowest amount of multiple retailers, accounting for just 30% of all store fascias, with the most notable being Boots and Marks & Spencer.
- Clothing and Footwear accounts for just 1% of floorspace, whilst 6% is dedicated to Health & Beauty provision and 3% to Books and Recorded Media provision.

Multiple Flag	Kingston upon Thames	New Malden	Surbiton	Tolworth
Multiple	64%	44%	42%	30%
Non-Multiple	36%	56%	58%	70%

Convenience Offer

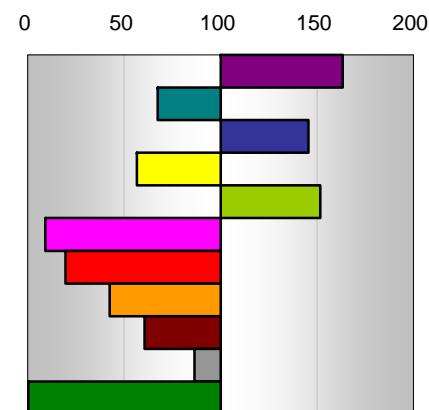
- Tolworth has a higher provision of convenience floorspace than New Malden, but less than Surbiton. Key stores include Marks & Spencer and Iceland.
- Food and Supermarket provision within the town centre accounts for 22% of floorspace.

Report Category	Kingston upon Thames	New Malden	Surbiton	Tolworth
Books/Recorded Media	2%	2%	1%	3%
Department & Variety Stores	26%	5%	1%	1%
DIY & Home Improvement	1%	0%	0%	0%
Electrical	3%	1%	1%	2%
Fashion / Clothing - Childrens Clothing	1%	0%	0%	1%
Fashion / Clothing - General Clothing	8%	1%	1%	0%
Fashion / Clothing - Ladieswear	6%	2%	0%	0%
Fashion / Clothing - Menswear	2%	0%	0%	0%
Food/Supermarket	5%	13%	23%	22%
Footwear	1%	2%	0%	0%
Gifts/Greeting Cards	1%	4%	1%	1%
Health/Beauty	3%	16%	8%	6%
Housewares	5%	6%	7%	5%
Jewellery, Watches & Silver	1%	1%	0%	0%
Leisure Services	11%	8%	8%	19%
Miscellaneous	5%	10%	13%	10%
Newsagents	2%	1%	2%	2%
Restaurant/Fast Food	8%	11%	12%	10%
Services	6%	17%	20%	17%
Toys, Games & Hobbies	3%	0%	0%	1%

Tolworth's Comparison Catchment Mosaic Profile

- Tolworth's current catchment area is dominated by the four key Mosaic UK Groups:
 - Symbols of Success (27%)
 - Suburban Comfort (27%)
 - Urban Intelligence (20%)
 - Happy Families (7%)
- Relative to South East averages this area displays a very affluent population, over-indexing on the most affluent Groups, Symbols of Success, Suburban Comfort and Urban Intelligence.

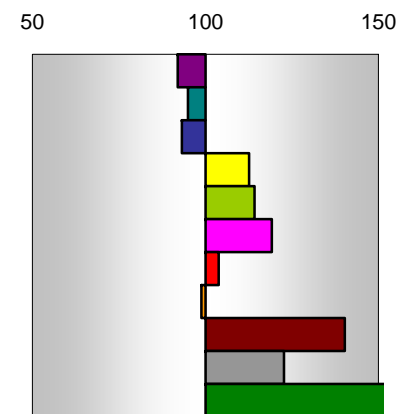
Mosaic Lifestyle Groups	Tolworth	%	London & South East	%	Index
A Symbols of Success	73,354	27.02	3,130,603	16.55	163
B Happy Families	19,968	7.36	2,062,556	10.90	67
C Suburban Comfort	73,269	26.99	3,506,388	18.54	146
D Ties of Community	18,704	6.89	2,301,726	12.17	57
E Urban Intelligence	54,269	19.99	2,492,722	13.18	152
F Welfare Borderline	1,681	0.62	1,293,916	6.84	9
G Municipal Dependency	748	0.28	266,832	1.41	20
H Blue Collar Enterprise	11,024	4.06	1,807,908	9.56	42
I Twilight Subsistence	3,163	1.17	364,139	1.93	61
J Grey Perspectives	15,240	5.61	1,227,051	6.49	87
K Rural Isolation	21	0.01	462,378	2.44	0
	271,441	100	18,916,219	100	



Tolworth's Mosaic Profile 2008 vs 2003

- The overall population has increased within the last five years in Tolworth's current catchment area, from 264,916 to 271,441, an increase of 2.46%.
- In terms of the Mosaic profile, there has been a slight decrease in both the number and percentage of the more affluent groups Symbols of Success, Happy Families and Suburban Comfort, but increases in the groups Urban Intelligence and Grey Perspectives.

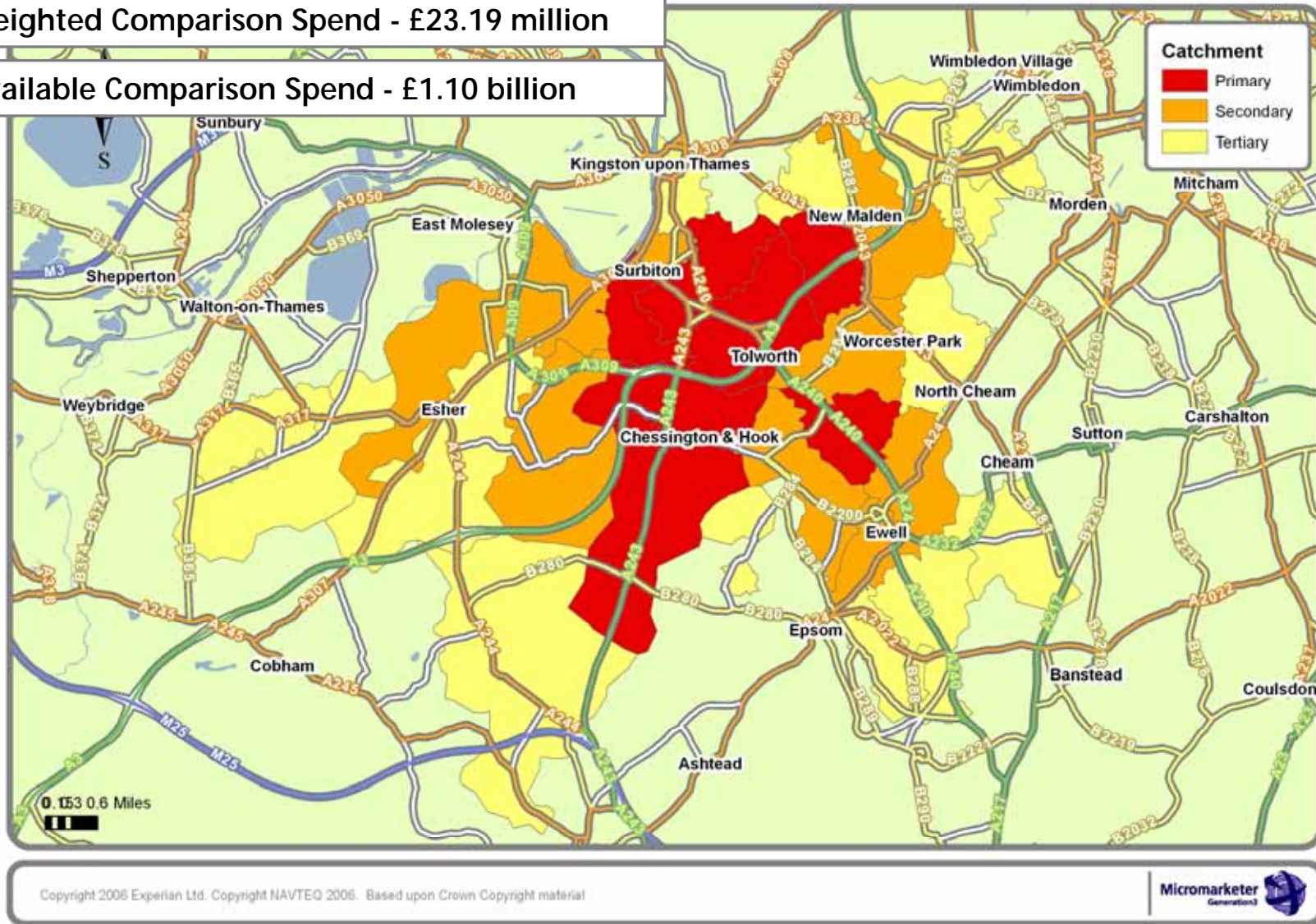
Mosaic Lifestyle Groups	2008 Pop	%	2003 Pop	%	Index 2008 - 2003
A Symbols of Success	73,354	27.0%	77,811	29.4%	92
B Happy Families	19,968	7.4%	20,516	7.7%	95
C Suburban Comfort	73,269	27.0%	76,719	29.0%	93
D Ties of Community	18,704	6.9%	16,207	6.1%	113
E Urban Intelligence	54,269	20.0%	46,371	17.5%	114
F Welfare Borderline	1,681	0.6%	1,376	0.5%	119
G Municipal Dependency	748	0.3%	703	0.3%	104
H Blue Collar Enterprise	11,024	4.1%	10,885	4.1%	99
I Twilight Subsistence	3,163	1.2%	2,201	0.8%	140
J Grey Perspectives	15,240	5.6%	12,124	4.6%	123
K Rural Isolation	21	0.0%	3	0.0%	683
	271,441	100.0%	264,916	100.0%	



Tolworth's Comparison Catchment Area

Weighted Comparison Spend - £23.19 million

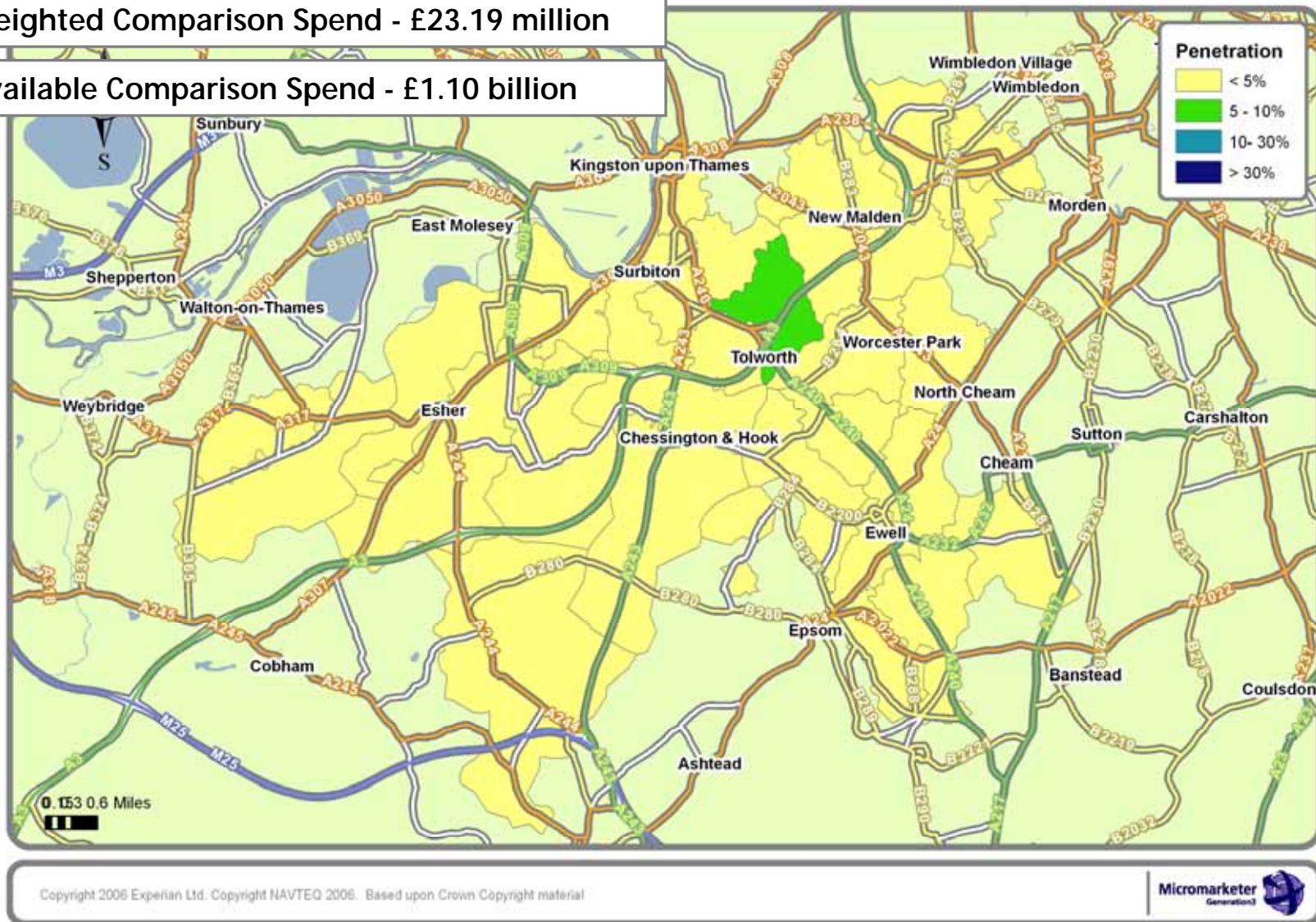
Available Comparison Spend - £1.10 billion



Tolworth's Comparison Catchment Area

Weighted Comparison Spend - £23.19 million

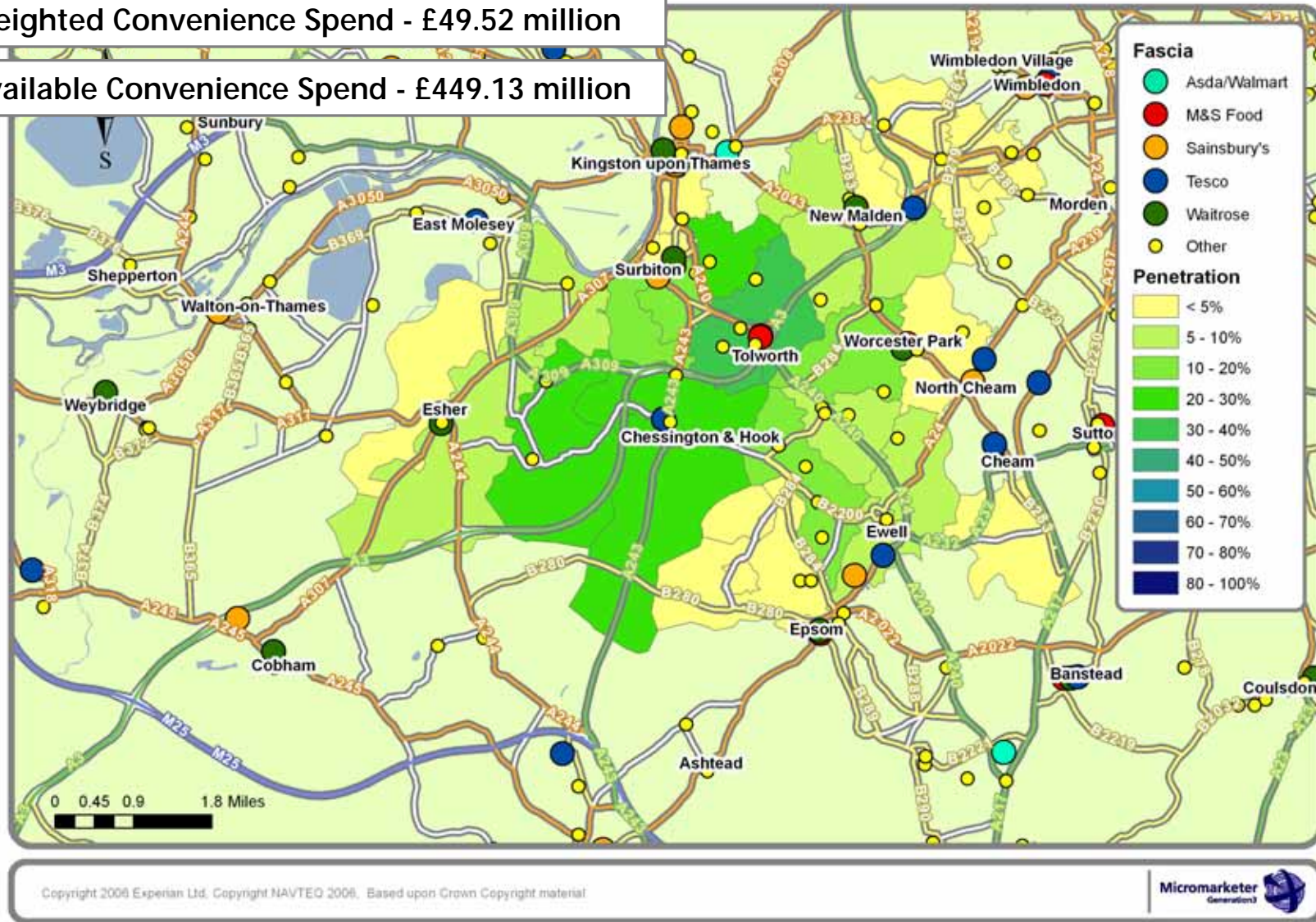
Available Comparison Spend - £1.10 billion



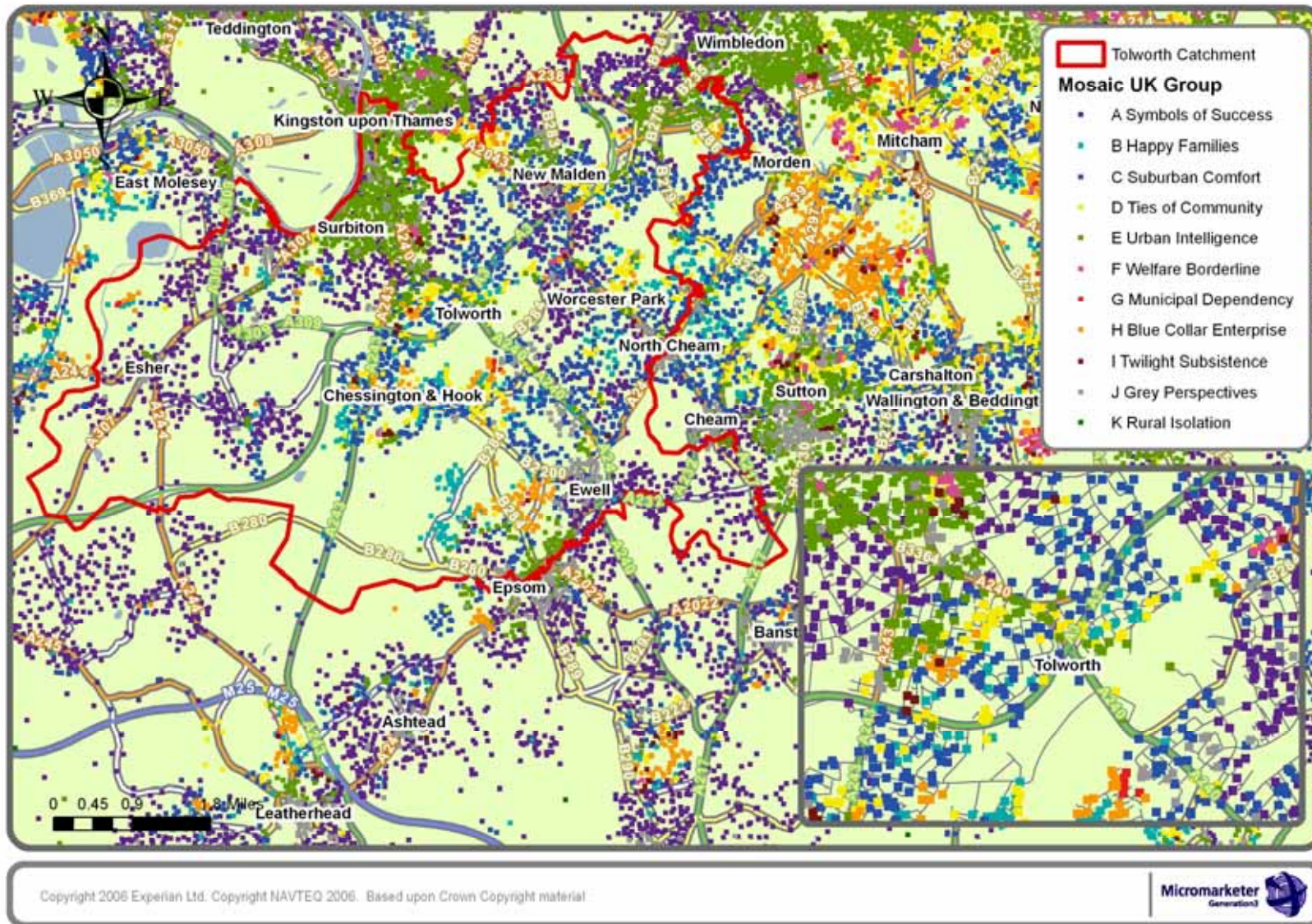
Tolworth's Convenience Catchment Area

Weighted Convenience Spend - £49.52 million

Available Convenience Spend - £449.13 million



Tolworth Mosaic Map



Tolworth Convenience and Comparison Leakage

- Tolworth currently receives just 2.1% of available spend within its comparison catchment area, approximately £23.2 million out of an available £1.1 billion. Key competition comes from Kingston upon Thames, which receives approximately 37.6% of market share within Tolworth's catchment - £414.0 million.
- In terms of convenience spending, Tolworth receives 11.0% of its catchment spend, £49.5 million. Shannon Corner Retail park receives 14.3% - £64.4 million, and Surbiton receives 11.9% - £53.7 million.

Comparison Spend Leakage

Centre	Weighted Spend	%
Kingston upon Thames	£414,049,585	37.6%
Epsom	£122,592,295	11.1%
Sutton	£122,104,573	11.1%
Wimbledon	£71,402,916	6.5%
London West End	£66,493,578	6.0%
Guildford	£24,453,210	2.2%
Tolworth	£23,191,989	2.1%
Croydon	£22,730,278	2.1%
Tooting	£20,439,229	1.9%
New Malden	£20,087,954	1.8%
White City	£19,017,394	1.7%
Surbiton	£17,554,009	1.6%
Merton - Priory Retail Park	£17,400,883	1.6%
Richmond (London)	£17,293,148	1.6%
Putney	£17,115,145	1.6%
Croydon - Purley Way	£16,098,018	1.5%
Hounslow	£14,479,312	1.3%
Clapham Junction	£6,986,322	0.6%
Other	£67,422,127	6.1%
	£1,100,911,965	100.0%

Convenience Spend Leakage

PlanName	Total	%
New Malden - Shannon Corner Retail Park (Tesco Extra)	£64,401,134	14.3%
Surbiton (Sainsburys)	£53,739,905	12.0%
Tolworth (Marks & Spencer)	£49,516,992	11.0%
Epsom - Kiln Lane Retail Park	£48,621,739	10.8%
North Cheam (Sainsburys)	£30,418,622	6.8%
Kingston upon Thames (Waitrose, Sainsburys, Lidl)	£27,980,431	6.2%
Epsom	£24,883,057	5.5%
New Malden (Waitrose)	£18,870,552	4.2%
London Road, Kingston upon Thames (Asda)	£12,852,286	2.9%
Roehampton Vale, Wandsworth	£11,179,185	2.5%
Esher	£9,608,600	2.1%
Reigate Road, Burgh Heath, Tadworth	£7,390,710	1.6%
Merton - Priory Retail Park	£7,298,348	1.6%
Chessington & Hook	£7,050,809	1.6%
Wimbledon	£6,358,076	1.4%
Leatherhead Road, Hook, Chessington	£5,666,647	1.3%
Cheam	£5,446,057	1.2%
Lower Ham Road, Hampton Wick	£5,004,415	1.1%
Other	£52,842,885	11.8%
Total	£449,130,450	100%

Tolworth Convenience and Comparison Spending

- Tolworth receives £49.52 million out of an available £449.13 million of convenience expenditure, estimating an 11.0% market share.
- In terms of comparison expenditure, Tolworth receives approximately £23.2 million out of an available £1.1 billion. Of this £3.0 million is Clothing spend, of an available £142.1 million, £2.4 million is Health and Beauty spend of an available £111.6 million, and £4.0 million is Homewares spend, of an available £188.5 million.

Category	Available Spend	Weighted Spend
Convenience Spend	£449.13	£49.52

Category	Available Spend	Weighted Spend
Comparison Expenditure	£1,100.91	£23.19
<u>Key Comparison Categories:</u>		
Clothing	£142.09	£3.02
Footwear	£30.72	£0.66
Jewellery, Clocks & Watches	£14.11	£0.30
Homewares	£188.49	£3.96
Toys, Games & Hobbies	£61.99	£1.30
Health & Beauty	£111.60	£2.36
Electrical	£73.63	£1.56
Books, Stationery & Recorded Media	£45.75	£0.96



Surbiton, New Malden and Tolworth Comparison & Convenience Catchment Statistics

4.0 Census Demographics

Tolworth, New Malden and Surbiton Census Counts

- Tolworth, New Malden and Surbiton all display a very white population, particularly Surbiton, where 88.5% of the population is white. New Malden has the greatest mix of ethnicities, with 6.9% Asian/Asian British, 3.2% Chinese/Other and 2.2% Mixed ethnicity groups.

Category	New Malden	New Malden %	Surbiton	Surbiton %	Tolworth	Tolworth %	London & South East	London & South East %
White	250,821	86.1%	219,012	88.5%	229,415	87.9%	15,732,203	85.6%
Asian or Asian British	20,187	6.9%	13,964	5.6%	15,841	6.1%	1,149,886	6.3%
Black or Black British	4,704	1.6%	2,884	1.2%	3,217	1.2%	877,206	4.8%
Chinese or Other Ethnic Group	9,228	3.2%	6,818	2.8%	7,613	2.9%	277,138	1.5%
Mixed	6,333	2.2%	4,781	1.9%	5,050	1.9%	349,503	1.9%

- The three towns display above the South East average of the most affluent social grades, with all having over 32% of their catchment populations fall within the highest grades AB. Just 21-22% of their populations fall within the lowest grades D and E, compared to the South East average of 28.6%.

Category	New Malden	New Malden %	Surbiton	Surbiton %	Tolworth	Tolworth %	London & South East	London & South East %
Social Grade AB	75,132	32.6%	65,979	33.9%	69,376	33.6%	3,764,337	26.2%
Social Grade C1	81,501	35.4%	68,274	35.1%	73,570	35.6%	4,645,131	32.3%
Social Grade C2	24,066	10.4%	18,889	9.7%	20,205	9.8%	1,860,597	12.9%
Social Grade D	24,231	10.5%	19,891	10.2%	20,622	10.0%	2,053,517	14.3%
Social Grade E	25,542	11.1%	21,747	11.2%	22,873	11.1%	2,053,115	14.3%

Tolworth, New Malden and Surbiton Census Counts

- Car Ownership is high within the three towns, another indicator of relative affluence. On average around 20-21% of the catchment populations has no access to a car, compared to 26.6% of the London and South East population.

Category	New Malden	New Malden %	Surbiton	Surbiton %	Tolworth	Tolworth %	London & South East	London & South East %
1 car or van	56,027	46.9%	46,681	45.5%	48,681	45.2%	3,267,421	42.9%
2 cars or vans	30,312	25.4%	28,181	27.5%	29,892	27.7%	1,832,883	24.0%
3 cars or vans	5,986	5.0%	5,772	5.6%	6,295	5.8%	374,747	4.9%
4 or more cars or vans	1,690	1.4%	1,727	1.7%	1,938	1.8%	120,347	1.6%
No car or van	25,471	21.3%	20,266	19.7%	20,927	19.4%	2,027,570	26.6%

- In terms of age profiles, New Malden displays the youngest profile, although the proportion of people aged 0-19 years is slightly below the South East average. Tolworth displays the oldest catchment profile, with above average proportions of all bands age 35+ years. Surbiton is quite a middle-aged profile, with above average proportions of people within the 35-54 age bands.

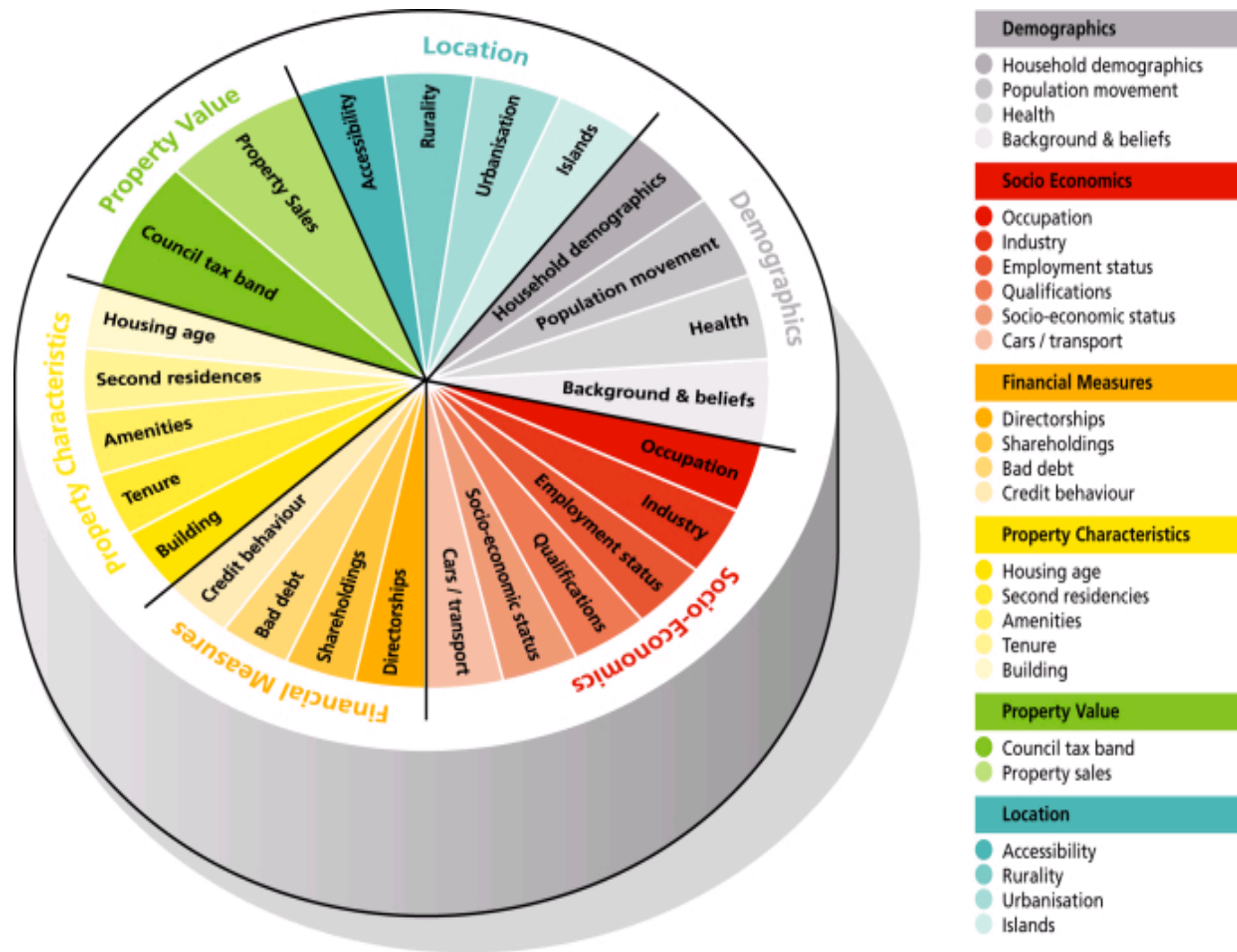
Category	New Malden	New Malden %	Surbiton	Surbiton %	Tolworth	Tolworth %	London & South East	London & South East %
Under 15	53,208	18.3%	45,495	18.4%	47,189	18.1%	3,483,675	18.9%
Age 15-19	16,588	5.7%	13,791	5.6%	14,597	5.6%	1,090,095	5.9%
Age 20-24	19,176	6.6%	15,711	6.3%	16,043	6.1%	1,169,455	6.4%
Age 25-34	47,260	16.2%	38,424	15.5%	40,280	15.4%	2,936,582	16.0%
Age 35-44	46,931	16.1%	40,142	16.2%	41,321	15.8%	2,850,792	15.5%
Age 45-54	39,497	13.6%	34,108	13.8%	36,124	13.8%	2,356,144	12.8%
Age 55-64	27,178	9.3%	23,542	9.5%	25,564	9.8%	1,798,551	9.8%
Age 65+	41,487	14.2%	36,331	14.7%	39,917	15.3%	2,700,774	14.7%



Surbiton, New Malden and Tolworth Comparison & Convenience Catchment Statistics

Appendix – Mosaic Descriptions

Overview of MOSAIC - Key Variables



Key Mosaic Groups: Symbols of Success

Demographics

- Typically aged 45+.
- Married.
- Well educated and social grades AB.
- HH income £45k+.
- Live in large houses in desirable suburban locations.
- School age children.
- Own home outright.
- Demanding careers in professional occupations.

Lifestyle & Interests

- Interests include museums and the arts, whilst holidays tend to be to exotic, long haul destinations.
- Have embraced technology to save time and simplify aspects of life where possible.
- Have extensive investments and are aware of the prevailing economic climate, combined with high incomes and a high net worth.
- Leisure is likely to be undertaken according to the preferences of the individual: the husband going to the golf club whilst the parents may visit the theatre leaving the children behind at home.



Consumer Psychology

As financial worries never surface for this Group, quality over-rides value for when making purchases, but that is not to say they don't weigh up the cost when making purchases.

The resources available to these consumers allows them to reward themselves with the latest electrical goods & designer fashion. Credit Cards may be used, due to their convenience and possible perks, rather than a need for credit. Symbols of Success spends a lot of money both on premium brands within frequently consumed product categories and on specialist forms of consumption.

Key Retailers

... Sony Centre ... YOUR M&S

ZARA Monsoon
John Lewis HARVEY NICHOLS

Key Mosaic Groups: Happy Families

Demographics

- Typically aged 25-44.
- Married.
- Social Grades AB.
- HH Income £45k+.
- Live on the outskirts of commutable metropolitan areas.
- Teenage children or empty nesters.
- Own home outright.
- Rewarding careers.

Lifestyle & Interests

- Leisure activities include TV and family outings to local attractions.
- Package holidays to European destinations are popular.
- Tend to be two car families.



Consumer Psychology

This Group enjoys relatively high levels of income, but also have a low propensity to save as the pressures of providing for a full nest family come first.

Large amounts of money is spent on providing for the family, and leisure activities such as going to the cinema.

Mass market products are popular, as are high-tech gadgets and satellite television. This Group have common sense values and seek long term security, and as a result, moderation will often win over purchases that appear too expensive.

Key Retailers

habitat 



RIVER ISLAND


look

faith

Key Mosaic Groups: Suburban Comfort

Demographics

- Typically aged 45+
- Married
- Social Grades ABC1
- HH Income £30k+
- Own home outright
- Have grown up children
- Approaching retirement
- Savings and investments for the future

Lifestyle & Interests

- Enjoy leisure activities such as golf and gardening
- Several holidays a year
- Much money is spend on gardening products and personal services such as hairdressing and dry cleaning.
- High quality food is also important and spending will be above average



Consumer Psychology

As customers, this group are well-educated and well-informed. For example, they have not been slow to see the opportunities provided by the internet, for activities such as booking holidays.

However they are unlikely to be innovators when it comes to new products and services. Generally they are more concerned with being aware of the alternatives in order to save money and risk.

Quality and service are extremely important, and this group will enjoy discussing the relative merits of products with shopkeepers or sales assistants.

Key Retailers



Key Mosaic Groups: Urban Intelligence

Demographics

- Typically aged 25-34.
- Young singles.
- Educated to degree level.
- Very low car ownership.
- Liberal views and cosmopolitan tastes.
- Highly paid professionals or full time students.
- Cultural variety and open-minded.
- Money is a measure of their success.
- Few children.

Lifestyle & Interests

- Their current lifestage means that disposable income is relatively high, helping to fund active social lives and high spending lifestyles.
- Exotic holidays are an accepted part of their lifestyle.
- The latest fashion and electrical goods are important, and are actively sought out.
 - This population is particularly supportive of businesses whose priorities involve environmental sustainability and the avoidance of cultural imperialism.



Consumer Psychology

These young singles see themselves as stylish, adventurous and creative individuals who stand out from the crowd. They enjoy spending money, and have a varied social life – enjoying visiting trendy bars, for example.

This type is constantly scanning the marketplace for the latest innovations and fashions – from organic food to alternative therapies to designer fashion. They have wholeheartedly bought into consumer society and all it has to offer. Marketing can work well, as they enjoy discovering new products and services.

Key Retailers

