

Royal Borough of Kingston upon Thames

Local Centres Study



Chessington North Parade

Prepared by the RBK Planning Policy Team

February 2009



Executive Summary

In order to meet the needs of Borough residents, this study is intended to inform future policy development for the provision of local shopping and services. It will also form part of the LDF evidence base.

Currently 28 local centres predominantly serve the local shopping and services function. However, these are supplemented by neighbourhood parades, the district centres and in some cases Kingston town centre.

As explained in Chapter 2 the study's methodology combines both quantitative and qualitative approaches. These include individual centre audits, residents' surveys and GIS analysis. All methods were designed to achieve the study's objectives which are outlined in Chapter 1.

In respect to the study's general outcomes, it is evident that local centres are still very important and continue to be well used. It has also been established that they mainly serve a top-up shopping role, which makes A1 convenience stores crucial to their vitality and viability. Despite only a small number of centres having large convenience stores (>150m²), some even provide for residents' main weekly food shopping. Although, their composition has adapted over time to meet residents' needs. Outlet uses are continuing to diversify. For instance leisure and recreation uses are increasing and gradually replacing A1 uses.

In South of the Borough local centres are particularly important to residents. In many respects they perform a function akin to the district centre role. Despite having the greatest number of large convenience stores, however, people in this area are most dissatisfied with existing provision. Therefore, it has been recommended that this neighbourhood should be the focus for future improvements.

Local centres' performance varies widely across the Borough. To address this fact differing approaches have been proposed to ensure their future health. For instance, some centres require boundary reviews to either expand, or replace parts of their primary frontage. Others have been identified as needing significant support and intervention. Whereas for those centres that no longer perform a local centre function, it has been advocated that they be re-designated as neighbourhood parades.

Nonetheless, there are a number of successful local centres. Some of the key criteria that make them successful are listed below:

- an adequately sized convenience store;
- a prominent location;
- adequate parking;
- a sufficient catchment area overlap;
- good environmental quality and
- a range of outlet uses

In future, the management of all the Borough's local centres will take the above criteria into consideration.

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1 INTRODUCTION

The aim of this study is to inform policy development for the provision of local shopping and services to meet the needs of Borough residents. Close and easy access to a range of local shops to buy everyday goods such as bread, milk and newspapers (which are examples of goods referred to as convenience goods), or use services such as a laundrette, restaurant or chemist is important because it reduces the need to travel. It also encourages social cohesion and provides an incentive for people to walk or cycle.

- 1.1 Local shopping and service needs are now principally met by a network of 28 local centres distributed across the Borough. A number of smaller neighbourhood parades and stand-alone convenience stores supplement the network of local centres. In addition Borough residents living in, or close to Kingston town centre and the three district centres are able to access the shopping and services these centres provide. The distribution of all these facilities, including those located in neighbouring boroughs, but convenient for Borough residents are shown on Map 1.
- 1.2 The study objectives are to:
 1. review the existing network of local shopping and service provision, identify areas of local convenience shopping deficiency, and to indicate how gaps in provision could be addressed;
 2. assess the health of the Boroughs 28 Local centres;
 3. establish what makes local centres successful and examine opportunities to enhance and strengthen the existing centres;
 4. identify if there are centres that do not function as local centres, and should be downgraded to neighbourhood parade status.
- 1.3 Firstly, the background to the study and the policy context will be explained. Then the existing network of local centres and convenience store provision will be identified (including the identification of deficiency areas and assessing the 'health' of the existing centres), before finally drawing conclusions and making recommendations.

2 BACKGROUND

2.1 This study identifies changes and trends in retail and service provision within the Borough's local centres and identifies where there are deficiencies in provision. It builds on previous RBK surveys dating back to 1989 by gathering comparable 'healthcheck' data such as outlet numbers, vacancy and use class derived from field surveys. The study also provides data on residents' use of the centres and resident views on factors such as environmental quality and accessibility (derived from responses to a Kingston Residents' Panel survey).

The Importance of Local Centres

- 2.2 Local centres are important for a number of reasons. The key reason is that they promote sustainable living by meeting local needs through the provision of easily accessible day-to-day convenience goods shopping, and access to services such as pharmacies.
- 2.3 Convenience stores are the key attraction as they sell top-up goods such as basic groceries like bread, milk and newspapers. Evidence suggests that convenience stores are the main reason people visit their local centre. As such, they perform a key anchoring role.
- 2.4 Access to local shops and services is especially important to the disabled, deprived and older members of the community. They are generally less able to travel longer distances to district and town centres, or other provision such as out-of-centre superstores regularly. By providing for daily shopping and other needs, local centres are able to promote social inclusion. They also assist in achieving the Government's wider objectives for sustainable development by minimising the need to travel.
- 2.5 Local centres can provide employment opportunities and are a focal point for the community. They are also important in promoting health and well being by encouraging people to walk or cycle to their local shops/services.

Evidence Gathering

- 2.6 The study is supported by:
1. Centre audits undertaken to obtain quantitative data on outlet occupancy, diversity of uses and vacancy rates to assist with assessing centre 'health'.
 2. A residents' survey to obtain qualitative information of residents' use and views of their local centres based on a postal questionnaire undertaken by IPSOS MORI, again to assess centre 'health'.
 3. Desk based GIS analysis of the distribution of existing facilities to identify catchment areas and numbers of households served, and also areas of deficiency.
- 2.7 The GIS analysis identified 400m catchment areas around each local centre and the other convenience store provision in neighbourhood parades and stand-alone stores. The 400m distance reflects the distance a resident would generally be willing to walk home with shopping from a centre. It broadly equates to a 5-minute walk time and is mid-point between the 300m and 500m walking distance ranges for shopping and other activity referred to in PPS6.

3 POLICY CONTEXT

National Policy Guidance

- 3.1 The national policy guidance for all types of centre that receive policy support is set out in Planning Policy Statement 6 Planning for Town Centres (PPS6). PPS6 explains how a pro-active plan-led approach should be adopted in order to promote the vitality and viability of all town centres, a definition that includes local centres. The approach should be to encourage a wide range of services in a good environment that is accessible to all.
- 3.2 Local centres are defined as having a range of small shops serving a small catchment area that is generally within walking distance. For instance, shops and services might include a newsagent; pharmacy; sub-Post Office; mini supermarket; hot food takeaway and laundrette. Their position in the town centre hierarchy is at the lowest level beneath district, town and city centres. However, it is important to note that for policy interpretation purposes local centres are included within the generic term town centres. Neighbourhood parades (which are smaller than local centres) are not included in the hierarchy and as such do not benefit from the same level of policy protection.
- 3.3 In respect of local centres PPS6 advises local planning authorities to:
- identify any deficiencies in local provision and identify opportunities to remedy deficiencies. This is best achieved through strengthening existing centres, or where appropriate proposing new local centres;
 - seek to protect existing facilities which provide for people's day-to-day needs; and
 - take a positive approach to strengthening local centres and planning for local shops by working with stakeholders, including the private sector and the community.
- 3.4 National guidance stresses the need for Local Planning Authorities to regularly monitor in order to ascertain the health of town centres. A list of 12 criteria, known as health check indicators are identified, but some like rents and property yields are not readily available for local centres and only the following are quantifiable:
- diversity of uses (number, type, floorspace);
 - vacancy rates;
 - accessibility;
 - view of customers/residents; and
 - environmental quality.
- 3.5 PPS6 concurs with the overarching principles in Planning Policy Statement 1 Delivering Sustainable Development (PPS1) in that the creation of vital and viable town centres plays a key role in facilitating sustainable patterns of development. It also corresponds with guidance set out in Planning Policy Guidance 13 Transport (PPG13), which recognises the importance of reducing the need to travel and the provision of a choice of transport modes to local centres.

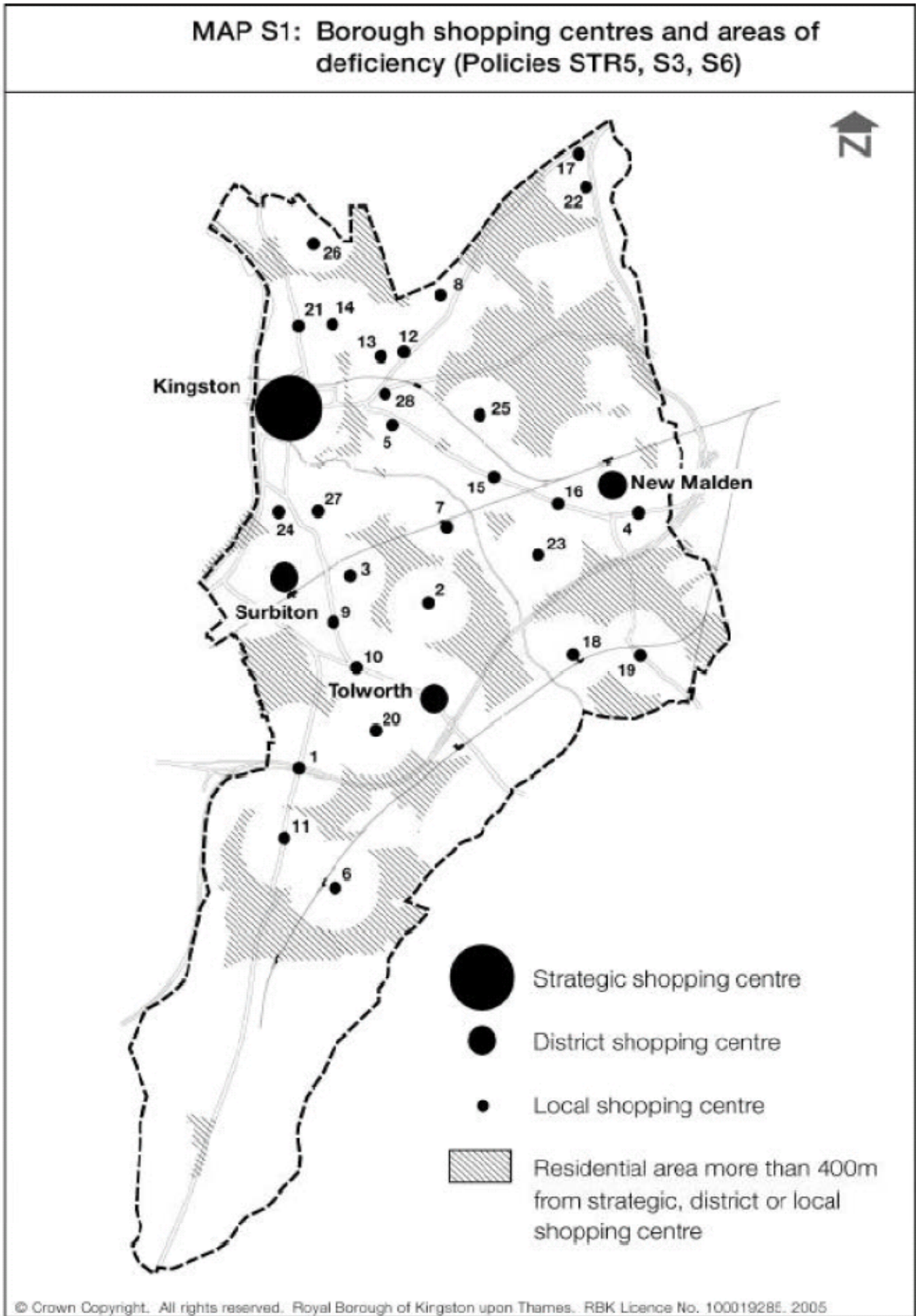
Regional Policy Guidance

- 3.6 The London Plan 2008 (Spatial Development Strategy for Greater London) sets out the regional policy guidance for London boroughs. It includes a number of policies, which specifically address town centres and identifies a network of centres that form the basis for policy development and delivery. Like PPS6, the London Plan includes local centres within the generic term town centres, but whilst the London Plan identifies district centres by name it leaves the boroughs to identify the local centres.
- 3.7 The London Plan acknowledges the importance of local centres by stating that they are of cumulative strategic significance. Yet, due to the generally dynamic nature of town centres, it is acknowledged that current classifications may change, and/or be refined to take into account the future needs of residents. For instance, a need may be identified to provide community facilities or to develop specialist roles in any given centre, which could change its position in the hierarchy.
- 3.8 The London Plan advises that the capacity of town centres should continue to be monitored through health checks (also outlined in PPS6), which take account of consumer expenditure growth and other needs such as those outlined above. Policy 2A.8 – Town Centres sets out the overarching approach to town centres and advises boroughs to:
- sustain and enhance the vitality and viability of town centres including community and civic facilities/activities;
 - through intensification and selective expansion accommodate economic and housing growth;
 - reduce delivery, servicing and road user conflict;
 - improve the sustainability of developments; and
 - take into account the relationship between town centres in adjoining sub regions.
- 3.9 Policies 3D.1 – Supporting town centres and 3D.2 – Town centre development advocate the use of DPD policies to enhance access to goods and services and state that boroughs should strengthen the wider role of town centres. While policy 3D.3 – Maintaining and improving retail facilities concurs with national guidance, and highlights the significance of partnership working so as to prevent the loss of retail, as well as manage and enhance existing provision. Pinpointing deficiencies particularly in regard to convenience shopping within the network of centres is also encouraged.

Local Policy - Unitary Development Plan (UDP)

- 3.10 The Royal Borough of Kingston upon Thames Unitary Development Plan First Alteration was adopted in August 2005 and provides the local policy context for Kingston's local shopping centres. Strategic policy STR5 – Shopping and Town Centres details the Borough's overarching approach regarding shopping policies. It seeks to maintain the existing broad distribution and prosperity of local centres (as well as district and town centres) throughout the borough in order that residents have a range of shopping and community facilities within a reasonable distance.
- 3.11 The Borough currently has a network of 28 local centres, which are identified on map Map 2 and in Table 1 - Local Centres – as identified on Map S1 .

Map 2: UDP Map S1



Map S1 Source: Unitary Development Plan 2005, p.69

Table 1: Local Centres – as identified on Map S1

No	Centre	Neighbourhood
1	Ace of Spades	South of the Borough
2	Alexandra Drive	Surbiton
3	Berrylands Road	Surbiton
4	Burlington Road	Maldens and Coombe
5	Cambridge Road (E)	Kingston Town
6	Chessington North Parade	South of the Borough
7	Chiltern Drive	Surbiton
8	Crescent Road	Maldens and Coombe
9	Ewell Road (N)	Surbiton
10	Ewell Road (S)	Surbiton
11	Hook Parade/Elm Road	South of the Borough
12	Kingston Hill (N)	Kingston Town
13	Kingston Hill/Park Road	Kingston Town
14	Kings Road	Kingston Town
15	Kingston Road (W)	Kingston Town
16	Kingston Road (E)	Maldens and Coombe
17	Kingston Vale	Maldens and Coombe
18	Malden Manor	Maldens and Coombe
19	Plough Green	Maldens and Coombe
20	Red Lion Road	Surbiton
21	Richmond Road	Kingston Town
22	Robin Hood Way	Maldens and Coombe
23	South Lane	Maldens and Coombe
24	Surbiton Road	Kingston Town
25	The Triangle	Maldens and Coombe
26	Tudor Drive	Kingston Town
27	Villiers Avenue	Surbiton
28	Coombe Road	Kingston Town

3.12 Policy S3 - Local Shopping seeks to protect local centres by resisting the loss of retail outlets unless the following criteria apply:

- (A) “Adequate alternative retail facilities are available to serve local residents, and the existing range of basic shopping facilities in the local centre is not adversely affected;
- (B) Financial or professional services appropriate to a shopping area (Class A2), the sale of food and drink (Class A3), launderettes or community facilities, which serve surrounding residential uses are proposed;
- (C) The proposed development will not create an excessive length of shop frontage in non-A1 use;
- (D) A window display is maintained;
- (E) The protection of residential amenity in, and adjacent to, a local centre is safeguarded in terms of noise, litter, fumes, and traffic and road safety.” (p.68 of UDP 2005)

3.13 Policy S4 – Retention of Shops Outside Kingston Town Centre and the District and Local Shopping Centres also seeks to resist the loss of retail outlets.

Especially if there is a lack of alternative shops to serve local residents, the range of basic goods available in the area is adversely affected by retail loss, or local residents have to travel more than 400m to alternative shops for basic facilities.

- 3.14 Policy S5 – Alternative Use of Shops Outside Kingston Town Centre, District and Local Shopping Centres permits the change of use of retail outlets to A2 (financial or professional), A3 (restaurant and café), C3 (residential) or community uses consistent with Policy CS1.
- 3.15 Policy S6 – New Small Shops Outside Centres states that applications for small A1 convenience stores ($\leq 150\text{m}^2$ net) in dispersed locations will be looked upon favourably if other convenience stores are beyond reasonable walking distance and they are deemed to benefit local residents. Suitable uses would be convenience stores, newsagents or sub-Post Offices.
- 3.16 Policy S10 – Environmental Improvements in Local Shopping Centres highlights that the health of Kingston's local centres is a longstanding Council concern. The Council recognises that good environmental conditions are essential to local centres if they are to remain attractive and fulfil their role. This is especially important to the disabled and older members of the community and those who do not have access to a private car. Environmental improvements are therefore essential in sustaining and improving the vitality and viability of local centres.

Local Development Framework

- 3.17 This study will form part of the evidence base for the Core Strategy, which is programmed to progress through its Issues and Options stage in 2009.
- 3.18 The Kingston Town Centre Area Action Plan (K+20 AAP) was adopted in July 2008. Amongst other things it promotes improvements in the range and quality of shopping and service provision within the town centre. The town centre provides a very different scale and range of provision to the local centres for a very much wider catchment area.

Links to other Council Strategies – The Community Plan 2008

- 3.19 The Kingston Strategic Partnership has produced an overarching strategy for the Borough. The Strategy's three cross-cutting themes are all relevant and are addressed by promotion of the network of local centres. Local centres can promote a sustainable distribution of facilities and sustainable travel (Theme 1), aid a prosperous and inclusive economy (Theme 2) and make communities safer, healthier and stronger (Theme 3).

4 THE EXISTING NETWORK

Distribution of centres/facilities

- 4.1 As referred to in the Introduction of this study, the daily needs of the Borough's residents are met mainly by the Borough's 28 local centres. As well as the three district centres and indeed by Kingston town centre. There are also a number of stores located in small parades across the Borough and there are a surprising number of stand-alone stores (over 60) that are mostly small in size, but nonetheless provide a top-up convenience goods facility.
- 4.2 The older and more densely populated parts of the Borough have the highest number of local centres, with Kingston Town and Maldens and Coombe accounting for 9 centres each. Surbiton has 7 centres and South of the Borough has just 3.
- 4.3 There is an interesting pattern of local centre distribution evident from Map 2, which is the arc of 'satellite' local centres around Kingston town centre and each of the three district centres. There are 8 local centres arcing around Kingston town centre, all approximately 1.5km from the town centre. 4 centres 'ring' Surbiton (also approximately 1.5km away from that centre) two of which (Surbiton Road and Villiers Avenue) are satellites of both Surbiton and Kingston town centres. 2 centres ring both Tolworth and New Malden, but the pattern here is less distinct. This is likely to reflect the proximity of the A3 and railway lines, which are major barriers to movement and connections.
- 4.4 The satellite centres that surround Kingston and Surbiton such as Berrylands Road and Ewell Road (N) tend to be located within a ring of largely Victorian suburban housing. These older areas tend to be of comparatively higher density than more recent suburban areas located further away from Kingston and Surbiton, such as Kingston Vale (1950s) and Tudor Drive (1950s).
- 4.5 Beyond the 15 satellites the distribution of centres relates to either the road network, (6 centres are located on main trunk routes that provide the opportunity to attract passing trade), or to railway stations. Chiltern Drive, Malden Manor and Chessington North Parade are three examples of the latter. There are comparatively few centres that are not associated with either a railway station, a busy trunk road or a comparatively high-density 'satellite' location. These centres are located in low density suburban catchments such as Tudor Drive, The Triangle, Alexandra Drive and South Lane.
- 4.6 There are no local centres south of Chessington North Parade, which reflects the limited population in the south and an area that is largely Green Belt. The local convenience goods needs of households in the village of Malden Rushett are served by a convenience facility located in the petrol filling station on Leatherhead Road.
- 4.7 Table 2 shows that overall below two-thirds of the Borough's households have convenient access (defined as being within 400m of home) to a convenience goods retail facility. The proportions vary across the neighbourhoods with households in Kingston Town having much higher access (87%) compared to households in South of the Borough (57%). Maldens & Coombe has the highest number of households without convenient access to a convenience goods facility, where over 6,700 households are more than 400m from a facility. Across the Borough there are significant numbers of households without convenient access and we consider this issue in the Areas of Deficiency section later in the report.

Table 2: Householder Access to Convenience Goods Provision

Neighbourhood	Households <u>Within</u> 400m Catchment Area		Households <u>Outside</u> 400m Catchment Area	
	No.	%	No.	%
Kingston Town	15428	87	2337	13
Maldens & Coombe	11535	63	6721	37
Surbiton	11808	72	4613	28
South of the Borough	6361	57	4889	43
BOROUGH TOTAL	45132	71	18560	29

Catchment Area Characteristics

- 4.8 Appendix 1 identifies the number of households within each centre's catchment area. Ewell Road (N) is supported by the largest number of catchment area households (2,081), and contains the largest number of outlets (55). The correlation of centre scale with potential catchment size is also evident at the other end of the spectrum, where the centre with the smallest catchment size is Kingston Vale (337 households) and contains just 5 outlets.
- 4.9 Many of the local centres have catchment areas that overlap with one or more other centres. Only 6 have no overlap, and 9 share more than a third of their catchment area with other centres. The degree of overlap suggests that many Borough residents are well served by local facilities (being within easy walking distance of more than one local centre), and there is possible over provision in some areas. Appendix 1 sets out the degree of overlap for each of the centres. Discounting for overlap indicates that on average a local centre of 20 outlets requires a catchment area of 900 households.
- 4.10 A discrete catchment area does not always result in a successful centre. Whilst centres such as Ace of Spades and Alexandra Drive are successful, others such as Chiltern Drive and Red Lion Road are not. In the case of Chiltern Drive the relatively small catchment size (471 households) and the centre's poor connectivity are the critical factors why this centre is failing. The centre once supported 22 outlets but now experiences a 41% vacancy rate. However, the reasons for the poor performance of Red Lion Road are less obvious given that it has a catchment of over 1,100 households. Factors contributing to poor performance are the lack of dedicated parking and proximity to strong competition such as Ewell Road (S), and Tolworth district centre.
- 4.11 A number of centres continue to trade with considerable catchment area overlap, especially in the Kingston Town Neighbourhood. For example, Kingston Hill (N) has catchment area overlap with three other centres. The nearby centre of Kingston Hill/Park Road has catchment area overlap with two other centres. Even though these centres vary in size, both appear to be vibrant with vacancy rates of 0% and 15% respectively.

Centre Characteristics

- 4.12 There is wide divergence in the character of the centres in terms of form and size. One of the key characteristics is location, specifically if the centre is located on a busy main road (where it can attract passing trade), or if it is located on a quieter residential road (where it is reliant on trade from the local catchment).

- 4.13 There is an approximate even split between the number of centres located on busy main roads and those located on local roads. Centres located on main roads tend to be linear in form and support more outlets, which is usually because they sustain more specialist retailers that benefit from the volume of passing trade. Ewell Road (N and S) and Surbiton Road are examples of centres operating successfully from main road locations. The centres located on main roads have less opportunity for dedicated parking bays on service roads, separated from the highway, and a number of such centres have no dedicated parking at all.
- 4.14 The centres located on minor local roads are also generally linear in form, but are smaller in scale. They tend to support fewer specialist stores, and contain a broad range of day-to-day convenience shops and services catering predominantly for the local households. Some like Richmond Road and Ewell Road South have a high proportion of restaurants, whereas others such as South Lane and Tudor Drive are small in outlet numbers, but have a broad range of provision covering the main facilities needed in a local centre.
- 4.15 The A3 corridor hosts 2 local centres - Ace of Spades on the Hook junction and Robin Hood Way accessed from the A3 via a local distributor road. Additionally along the A3 there are local parades at Southwood Drive, Hook Rise North and Tolworth Rise South. These centres/parades tend to support a significant number of specialist retailers often focusing on automobile related items, electrical or DIY goods and have little in the way of convenience store provision. The specialist stores benefit from the high visibility location next to the A3 and the ample and convenient parking provision that centres like Robin Hood Way offer.
- 4.16 The availability of car parking varies between the centres. Overall, 2/3 of the Borough's local centres have either dedicated parking bays or convenient on-street parking. The quality of the provision also varies. Some centres having dedicated parking bays on service roads separated from the highway, while others have roadside parking bays. A small number have no dedicated provision at all. Examples of good quality parking bay provision both separated from the highway, and on a dedicated service road are Alexandra Drive and Chessington North Parade which are generally successful centres. Examples of parking bays on the highway are Park Road and Ewell Road (S). Both are reasonably successful centres. Whilst centres such as Burlington Road, Cambridge Road East and Kingston Road East have no dedicated parking and are all performing poorly.

Areas of Deficiency in Convenience Goods Provision

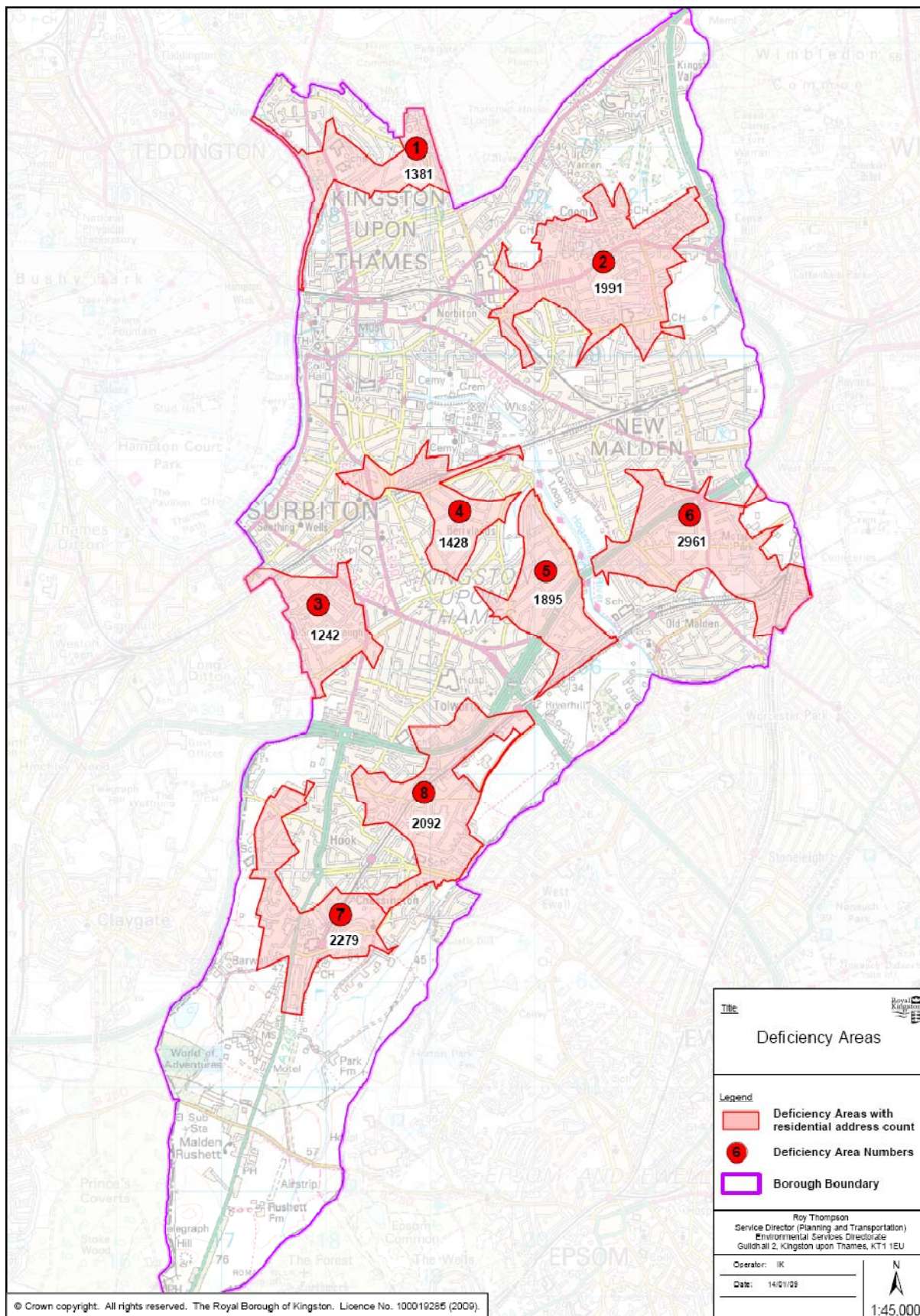
- 4.17 Table 2 illustrates that over half of the households in the Borough (totalling 18,500 households) do not have a convenience goods facility within 400 metres of home. The highest proportion of deficient households (43%) is in South of the Borough. However, Maldens and Coombe has the highest overall number of deficient households totalling over 6,700.
- 4.18 Map 3 and Table 3 identifies the deficiency areas, which comprise several isolated small pockets, as well as 8 larger areas that contain more than 1,000 households. These areas are identified on the map, and listed in Table 3.

Table 3: Deficiency Areas

Deficiency Area	No. of Households in Deficiency Area
1	1,381
2	1,991
3	1,242
4	1,428
5	1,895
6	2,961
7	2,279
8	2,092

- 4.19 The deficiency area (area 6) with the highest number of households is located in the east of the Borough around Motspur Park, New Malden. It contains almost 3,000 households. It is sandwiched between Malden Manor and Plough Green catchment areas to the south, and Burlington Road, Kingston Road (East) and South Lane catchment areas to the north. However, Worcester Park District Centre in the London Borough of Sutton is located a short distance to the east. It is likely that residents living in the deficiency area will access Worcester Park due to its close proximity. A potential location where provision could be encouraged to address the deficiency is at the junction of Motspur Park, Amberwood Rise and Malden Road. This is a mid-point within the identified deficiency area where the road network and residential layout is most conducive to development.
- 4.20 The second largest deficiency area (area 7) is located in South of the Borough and contains approximately 2,300 households. To the north are Chessington North Parade and Hook Parade/Elm Road centres, and to the south is a large expanse of Green Belt. A suitable location to address the convenience goods provision shortfall would be in the vicinity of Chessington Community College, Ellingham Primary School, St. Philips School and Chessington South railway station. Here the cluster of existing activities and good transport links would be likely to support convenience goods floorspace provision to address the deficiency issues.
- 4.21 Area 8 is also located in the South of the Borough Neighbourhood and contains approximately 2,100 households. Its eastern edge touches land at Tolworth Court Farm which is designated as Metropolitan Open Land as well as the Epsom and Ewell Borough boundary. The deficiency area has varying characteristics. Parts are covered by residential districts such as Fircroft Road and Sanger Avenue, whereas others have industrial/business designations such as Chessington Industrial Estate and parts of Red Lion Road Business Park. To the south and east are Chessington North Parade, Hook Parade/Elm Road, Ace of Spades and Red Lion Road and their associated catchment areas. To the north there is Ewell Road (S) and Alexandra Drive. A suitable location to address deficiency in this area might be in close proximity to Bucklands Infant and Nursery School and Chessington Industrial area. The cluster of activities here is also a mid point between two residential areas that could support prospective convenience store provision.

Map 3: Areas of Deficiency



4.22 With respect to the other deficiency areas, a number are located on the borough boundary, others are criss-crossed by major transport routes such as the A3, A238, and the railway lines that run both east to west, and north to south through the borough. These transport routes act as physical barriers making access to shops and services difficult. If new A1 convenience provision were to be put into these areas, these accessibility factors would have to be considered. The deficiency areas vary hugely in their character. For instance Deficiency area 1 is located in the north west of the borough just a short distance from a large sub-regional shopping centre (Kingston Town Centre). It is a largely residential area largely made up of terraced and semi-detached housing and abuts the River Thames, as well as the London Borough of Richmond boundary. There are only small pockets of Metropolitan Open Land in the vicinity, namely Canbury Gardens and the Sports Ground associated with the Hawker Centre. In comparison, Deficiency Area 7 in South of the Borough covers the Chessington South area where there is no district centre and there is a considerable amount of open space in close proximity. On three sides, the area is surrounded by Green Belt. Within the area there is also one of the Borough's designated industrial/business areas called Barwell Business Park. Housing is predominantly characterised by semi-detached properties.

5 HEALTHCHECK ASSESSMENT

5.1 In this section the quantitative and qualitative indicators of centre health will be reviewed. The quantitative indicators are based on data gathered through centre audit, and the qualitative indicators from the results of a residents survey.

Quantitative Indicators

5.2 Data was gathered in late 2007 on the diversity of uses within each of the 28 local centres. This is presented in the Appendices of this report. The data is used to monitor change over time and to identify trends, comparing 2007 data with data from previous surveys that extends back nearly 20 years. The analysis below evaluates change in respect of the following indicators:

- the number of outlets;
- vacancy; and
- occupancy use class.

5.3 This assessment also records floorspace data, the first time such data has been included in an RBK local centres survey. The data is discussed below, and will be used for comparative purposes in future studies.

Outlet Numbers

5.4 Summary Table 4 below and Table 3 in the Appendix set out outlet numbers over time.

Table 4: Outlet Numbers

Neighbourhood	1989	1996	2003	2007
Kingston Town	147	161	172	165
Maldens & Coombe	124	124	122	136
Surbiton	161	163	165	177
South of the Borough	100	100	96	104
BOROUGH TOTAL	532	548	555	582

- Borough-wide outlet numbers have increased marginally year-on-year, which results mainly from outlet subdivision and redevelopment, but also reflects adjustments in centre boundaries.
- The seemingly large increase in outlet numbers between 2003 and 2007 is largely due to boundary adjustments, and not to an escalation in sub-division.
- Local centres in Surbiton and Kingston have the highest overall number of outlets.
- South of the Borough has the lowest number reflecting the fact that there are only 3 local centres in that neighbourhood, compared to 7 in Surbiton and 9 in Kingston and Maldens & Coombe.

Vacancy

5.5 Table 5 sets out the number of vacant outlets in each of the neighbourhoods in the survey years, and the change over time.

Table 5: Vacant Outlets

Neighbourhood	1989	1996	Change 89 - 96	2002	Change 96 - 02	2007	Change 02 - 07
Kingston Town	3	20	+17	15	-5	23	+8
Maldens & Coombe	10	15	+5	6	-9	13	+7
South of the Borough	9	11	+2	5	-6	9	+4
Surbiton	6	16	+10	19	+3	19	0
BOROUGH TOTAL	28	62	+34	45	-17	64	19

- Overall vacancy rates have varied considerably over time with rates in 2007 being the highest since 1996.
- The 64 vacant outlets in 2007 represents 11% of all outlets in the local centres (582).
- Whilst 2007 vacancy rates in Kingston and Surbiton are much higher than they were in 1989, the rates in Maldens and Coombe and South of the Borough have remained lower in number and have varied much less. This suggests demand and supply in these Neighbourhoods are relatively balanced.
- With the exception of Surbiton all neighbourhoods have experienced an increase in vacancy rates since 2002.

5.6 Appendix 3 sets out vacancy rates for each of the individual local centres over time. The centre which currently has the highest vacancy rate (41%) is Chiltern Drive, which has accelerated faster since 2002 than the local centre average (14% compared to 4%). The vacancy rate data demonstrates Chiltern Drive has performed poorly for many years, which despite being directly adjacent to the Berrylands railway station, is likely to result from its poor pedestrian accessibility, a lack of opportunity to attract passing trade and a lack of 'anchor' convenience store.

5.7 Other centres with comparatively high vacancy rates - ranging between 21% and 33% are The Triangle, Crescent Road, Kings Road and Coombe Road. The Triangle, which has four vacant outlets is of most concern due to the loss of its main convenience foodstore. The Crescent is a small parade with just 5 outlets where a single vacant outlet can lead to a misleadingly high vacancy rate.

5.8 Vacancy rates in Kings Road and Coombe Road is also of concern. The Kings Road centre is disjointed, despite being anchored by a good sized Coop convenience store, as it is interspersed with residential frontages that have increased over time. This detracts from the centre's appeal. The Coombe Road centre has two parades and the more northerly of the two has most of the vacant outlets. It is much less successful than its more southerly counter-part. Coombe Road is located close to the Park Road local centre, and there may be scope to rationalise the amount of retail and service space in both these centres that serve largely overlapping catchments.

5.9 Whilst the general pattern between 2002/07 has been for vacancy rates in the centres to increase, some centres have bucked this trend.

Berrylands Road for example has seen a reduction of 3 vacant outlets (a 75% reduction since 2002). This is a comparatively small (14 outlets), but nevertheless successful centre that is able to attract passing trade, and is anchored by 3 convenience stores including an independent grocers. An internet café has recently opened, which is a use that complements the A3 uses already present. This centre therefore offers a mix of convenience goods shopping and food and drink facilities that are clearly meeting the needs of its catchment population.

Use Class

5.10 Table 6 identifies the changes in some of the use classes over time.

Table 6: Use Changes

Neighbourhood		1996					2002/03					2007				
		A1	A2/3	Vac	Other	Tot	A1	A2/3	Vac	Other	Tot	A1	A2/3	Vac	Other	Tot
Kingston Town	No	103	34	20	18	175	102	39	15	16	172	85	35	23	22	165
	%	59%	19%	11%	10%	100%	59%	23%	9%	9%	100%	52%	21%	14%	13%	100%
Maldens & Coombe	No	77	31	15	1	124	80	26	6	10	122	65	29	13	29	136
	%	62%	25%	12%	1%	100%	66%	21%	5%	8%	100%	48%	21%	10%	21%	100%
South of the Borough	No	54	19	11	16	100	62	19	5	10	96	51	24	9	20	104
	%	54%	19%	11%	16%	100%	65%	20%	5%	10%	100%	49%	23%	9%	19%	100%
Surbiton	No	98	33	16	16	163	83	37	19	26	165	74	45	19	39	177
	%	60%	20%	10%	10%	100%	50%	22%	12%	16%	100%	42%	25%	11%	22%	100%
Borough Totals	No	332	117	62	51	562	327	121	45	62	555	275	133	64	110	582
	%	59%	21%	11%	9%	100%	59%	22%	8%	11%	100%	47%	23%	11%	19%	100%

- the proportion of A1 outlets held fairly constant between 1996 and 2002/3, but has reduced significantly over the last five years, and now stands at just less than half of all units
- A2 and A3 provision has marginally increased as a proportion of all outlets.
- Vacancy can vary significantly
- All other categories of land use have risen significantly in the last five years, and now stand at one in five units. The most significant increase in the “Other” category in the past five years has been an increase in residential uses.

Table 7: Use Classes – 2007¹

	Total	A1 Conv	A1 Comp	A1 Total	A2	A3	B1	D1	SG	Vac	Other
Kingston Town	165	28	57	85	7	28	2	0	14	23	6
		17%	35%	52%	4%	17%	1%	0%	8%	14%	4%
Maldens & Coombe	136	29	36	65	10	19	1	7	5	13	16
		21%	26%	48%	7%	14%	1%	5%	4%	10%	12%
South of the Borough	104	14	37	51	13	11	2	2	6	9	10
		13%	36%	49%	13%	11%	2%	2%	6%	9%	10%
Surbiton	177	20	54	74	19	26	6	5	15	19	13
		11%	31%	42%	11%	15%	3%	3%	8%	11%	7%
BOROUGH TOTAL	582	91	184	275	49	84	11	14	40	64	45
		16%	32%	47%	8%	14%	2%	2%	7%	11%	8%

- The number of A1 outlets in the Borough's local centres represents just under half of all outlets.
- The proportion of A1 is remarkably consistent across the four Neighbourhoods, ranging between 42% and 52%.
- Whilst A1 convenience stores are considered to be the key anchor stores in the local centres (and they are often the largest stores), in terms of outlet numbers it is the A1 comparison outlets that represent the highest proportion of A1 outlets – accounting for 2/3 of all A1 outlets.
- Professional and financial services (A2) and restaurants and cafes (A3) account for an average of 1/5 of all outlets across all the local centres. Centres in South of the Borough have the highest proportion of A2 uses, which emphasises the role that these three local centres play, which is somewhere between a local and district centre.
- The biggest number of D1 facilities is in Maldens and Coombe and Surbiton neighbourhoods. In Maldens and Coombe the majority of D1 uses are dentist surgeries and specialist medical clinics. In Surbiton, the D1 provision is largely a mix of dentists and opticians.
- Comparison with previous surveys indicates that Sui generis and "Other" uses have increased the most, and counter-balance the reduction in A1 retail uses. Sui Generis uses in the Borough's local centres include the following activities: car/scooter and motorcycle salesrooms; hire shops; car washing; car and van rental; tyre fitters; vets; nail salons; beauty salons and launderettes. The latter two activities are the most numerous.
- There are advantages and disadvantages from the changes in local centre composition.

¹ To allow comparison with previous surveys Table 6 and 7 groups restaurants, public houses and hot food takeaways under the A3 use class rather than separate them out into the A3, A4 and A5 categories introduced through the 2005 changes to the Use Classes Order.

The loss of the main attractors, (the retail outlets) is harmful and may reduce the viability of the other uses and activities that benefit from linked visits. However, the diversification in activity may help sustain the centres in the longer term as they adapt to a more service based role rather than a purely retail focus.

Rate of Change

Table 8: Rate of Change in Retail (A1) Provision

Neighbourhood	No of A1 in '89	No of A1 in '96	Change in No '89-'96	No of A1 in '02	Change in No '96-'02	No of A1 in '07	Change in No '02-'07
Kingston Town	114	103	-11	102	-1	85	-17
Maldens & Coombe	87	77	-10	80	+3	65	-15
South of the Borough	61	54	-7	62	8	51	-11
Surbiton	113	98	-15	83	-15	74	-9
BOROUGH TOTALS	375	332	-43	327	-5	275	-52

- Borough-wide the number of A1 outlets has decreased by almost a quarter (exactly 100 outlets) over the two decades since 1989. As identified above this has been counter balanced by growth in sui generis and “other” uses.
- The reduction has been most rapid in the past five years with half the total (52 outlets) lost since 2002.
- Kingston Town and Surbiton neighbourhoods have experienced the highest reduction in A1 outlets, losing approximately 29 and 39 respectively. This is compared to 22 in Maldens and Coombe and just 10 in South of the Borough.

5.11 A review of the individual centres (refer to Appendix 4) shows that Richmond Road has sustained the greatest decrease over the last five years, having lost 50% of its A1 provision. The principal factor has been the redevelopment of a site formerly occupied by 3 outlets to the residential development of King’s Penny House, and one change of use to A3. The catalyst for change may have been the arrival of the Richmond Road Sainsbury superstore in 2002. Though not as acute, other centres have also experienced significant A1 loss. Chessington North Parade for example has lost 6 outlets since 2003, more than Richmond Road in numeric terms but less in percentage terms. Chessington North Parade remains a very successful local centre, and despite the reduction in A1 provision there is only one vacant outlet in the centre.

5.12 In four of the 28 local centres there has been an increase in A1 outlets between 2002 and 2007. They are Burlington Road, Berrylands Road, Cambridge Road (E) and Villiers Avenue. Burlington Road has strengthened its role in providing ethnic food stuffs and services for Kingston’s Korean community. For example, a Korean supermarket, bakery and travel agent are new additions to the centre since 2002. A1 uses now account for a comparatively large proportion of outlets in Burlington Road (18 out of 32 outlets, 56%).

Table 9: Rate of Change in Convenience Store Provision

Neighbourhood	No of A1 Conv in '93	No of A1 Conv in '02/03	Change in No '93-'02/03	No of A1 Conv in '07	Change in No '02-'07
Kingston Town	44	30	-14	28	-2
Maldens & Coombe	37	33	-4	29	-4
South of the Borough	22	18	-4	14	-4
Surbiton	31	21	-10	20	-1
BOROUGH TOTAL	134	102	-32	91	-11

- There has been a 30% reduction in A1 convenience stores in the local centres since 1993 – 134 down to 91 outlets.
 - The decline in A1 convenience provision has slowed over the time period, but is more marked than the decline in A1 comparison goods.
 - The overall number of convenience outlets now averages at just three per centre.
 - Maldens and Coombe and Kingston Town local centres have the highest proportion of A1 convenience outlets.
- 5.13 When considering all of the individual centres, Burlington Road has the largest number of A1 convenience outlets. 8 out of 32 outlets are A1 convenience, most of which specialise and cater for the large Korean population in New Malden. It is also the only local centre to have experienced an increase in the number of convenience stores since 1993.
- 5.14 Kingston Hill South/ Park Road, Crescent Road and Chiltern Drive all have only one A1 convenience store. Albeit that Crescent Road is one of the smallest of the local centres containing just 6 outlets.
- 5.15 The fact that A1 convenience goods stores are decreasing in number as well as the overall A1 class reflects wider trends. It is most likely that these reductions are due to greater use diversification in centres. It is clear by looking at Table 6 that there has been a marked increase in the “other” classification. This covers uses such as A4 (drinking establishments) A5 (hot food takeaway), B1 (business), C3 (residential), D1 (non-residential institutions such as health services) and D2 (assembly and leisure such as cinemas and health and fitness gyms). For example, in Kingston Vale a florist was replaced with a dental clinic and three outlets in Richmond Road were demolished for a new residential development (C3).
- 5.16 Very few centres have bucked the trend of consistent reduction in convenience store numbers as can be seen in Appendix 5. In Ewell Road North, Kingston Road East, Berrylands Road, Kingston Vale and Villiers Avenue (the latter three all small centres) the convenience goods needs of the catchment population continue to be served by the same number of A1 convenience outlets as were present in 1993. Ewell Road North has a number of specialist food stores such as a delicatessen, Chinese herbalist, as well as a popular butcher that draws from more than just the local walk-in catchment. Kingston Road East has a number of specialist Korean foodstores, but the success of the centre suffers as a direct consequence of the lack of car parking.

Main Anchor Stores

5.17 Given the importance of convenience stores to the success of local centres, a surprising finding is that only eight out of 28 local centres have a key anchoring A1 convenience store of over 150m² gross² floor area.

Table 10: Main Anchor Foodstores

Centre	Neighbourhood	Floorspace (m ² gross)	Store Name
Ace of Spades	South of the Borough	280	Londis
Alexandra Drive	Surbiton	178	Spar
Chessington North Prde	South of the Borough	456	Sainsbury's Local
Chessington North Prde	South of the Borough	239	Martin's
Hook Parade/Elm Road	South of the Borough	406	Tesco Express
Hook Parade/Elm Road	South of the Borough	686	Budgens
Kings Road	Kingston Town	163	Co-Op Local
Malden Manor	Maldens & Coombe	255	Londis
Plough Green	Maldens & Coombe	496	Co-Op Late Shop
Robin Hood Way	Maldens & Coombe	189	Suroor Market
Robin Hood Way	Maldens & Coombe	199	Green Crescent Halal Butchers

- Table 10 identifies 11 convenience stores of more than 150m² located in the Borough's local centres. 5 of the stores are located in the three South of the Borough centres, and 4 are in Maldens and Coombe, with 1 each in Kingston Town and Surbiton.
- These stores are especially important in the South of the Borough neighbourhood as there are no large supermarkets in close proximity.
- The lack of 150m²+ foodstores in Kingston Town and Surbiton local centres probably reflect the high level of convenience goods store provision in Kingston town centre and Surbiton district centre, and the ease of accessibility to this provision for households in these two neighbourhoods.

5.18 Given the key anchoring role of attracting visitors performed by the larger convenience goods outlets, their loss in local centres should be resisted.

Floorspace

5.19 The 2007 RBK Local Centres Study is the first study of its kind to include data on floorspace. It is an important indicator, and will provide the opportunity for comparison with future surveys.

² <150 sqm is RBK's UDP definition of a small store

Table 11: Floorspace (sqm gross) – 2007

Neighbourhood	Total	A1 Conv	A1 Comp	A1	A2	A3	B1	D1	SG	Vacant
Kingston Town	10,286	2,034	3,947	5,981	409	952	255	0	1,418	1,271
		20%	38%	58%	4%	9%	2%	0%	14%	12%
Maldens & Coombe	8,701	2,926	2,409	5,335	514	816	66	410	512	1048
		34%	28%	61%	6%	9%	1%	5%	6%	12%
South of the Borough	10,271	2,814	3,954	6,768	1,071	833	110	181	457	851
		27%	38%	66%	10%	8%	1%	2%	4%	8%
Surbiton	13,301	1,278	4,442	5,720	1,176	1,563	691	267	2,244	1,640
		10%	33%	43%	9%	12%	5%	2%	17%	12%
BOROUGH TOTAL	42,559	9,052	14,752	23,804	3,170	4,164	1,122	858	4,631	4,810
		21%	35%	56%	7%	10%	3%	2%	11%	11%

NB all figures in m² gross

- Overall the Borough's local centres accommodate approximately 42,000m² which is a significant amount of floorspace and is roughly equivalent to two district centres³.
- All the neighbourhoods have between 8,000m² and just over 13,000m² of floorspace.
- Whilst Kingston Town has the most local centres (9) of the four neighbourhoods, these centres support the least amount of floorspace – at just over 10,000m². Conversely whilst South of the Borough has only 3 local centres, it supports the largest amount of floorspace - 17,000m². Whilst none of the three South of the Borough centres are at the scale of a district centre, their role resembles a district centre's role.
- In regard to individual local centres - Ewell Road (North) and Ewell Road (South) are the largest, both approximately 4,500m². The two largest South of the Borough centres, Ace of Spades and Hook Parade/Elm Road support approximately 3,900m² of floorspace. Surbiton Road has the fifth largest amount of floorspace with approximately 2,900m².
- There is a considerable difference between the largest and smallest centres. The smallest centres are approximately 1/10 the size of the largest. Kingston Vale, South Lane, Cambridge Road (East), Villiers Avenue and Kingston Hill (North) each support approximately 350-420m². Unsurprisingly the centres, which have the least floorspace tend to have the fewest outlets such as Kingston Vale which has only 5 outlets. This correlation applies to the opposite end of the scale too, whereby the centre with the most outlets (Ewell Road (North)) also has the most floorspace.
- The centres supporting the most floorspace for specific use classes is as follows:

³ Tolworth 20,000m², Surbiton 29,707m² and New Malden 30,498m².

A1	Ace of Spades	2,721m ²
A1 Convenience	Hook Parade/Elm Road	1,561m ²
A1 Comparison	Ace of Spades	2,332m ²
A2	Hook Parade/Elm Road	539m ²
A3	Ewell Road (North)	910m ²
B1	Ewell Road (North)	328m ²
D1	The Triangle	125m ²
SG	Ewell Road (South)	1,460m ²
Vacant	Chiltern Drive	501m ²

Qualitative Survey and Results

5.20 A Residents Panel Survey was undertaken in early 2008 to gain an understanding of how residents use and view their local centres. The survey was undertaken using a postal questionnaire by IPSOS MORI who are retained by RBK to manage and run the Residents Panel. A report was prepared⁴, and the key findings were as follows:

- Local shopping centres are most frequently used by Panel members for 'top-up' convenience goods (42% use a local centre at least once a week).
- 1/4 of residents use a local centre at least once a week for their main food shopping.
- Older panellists (aged 55 and over) are more likely to visit their local centre. While younger panellists are more likely to use their local shopping centre for eating out and entertainment at the weekend.
- Panel members are positive about a range of aspects of their local shopping centres, particularly in terms of accessibility. 70% of residents consider their local centre is easy to get to by public transport. While smaller proportions agree that their centre looks nice and provides a good range of services. This point is reflected in responses to the question: What improvements would you like to see in your local centre? An improvement in the range of shops was most commonly cited (46%).
- Residents in the South of the Borough are more negative about their local shopping centres, specifically in terms of accessibility; these panellists are more than twice as likely to disagree that their nearest centre is easy to get to.
- An encouraging 2/3 of residents travel to their local shopping centre on foot (65%), with younger panellists most likely to do so. It may be expected that given the poor accessibility issue raised by South of the Borough residents, that panel members from this area, together with those in Maldens & Coombe are more likely to travel by car than those in Kingston Town and Surbiton (approximately 30% compared to 12%).

⁴ Ipsos MORI Kingston Panel Wave 4 Final Report Feb/March 2008. This is available on line at: www.kingston.....

- Although convenience goods and services are the most common reason for visiting local shopping centres, panellists are more likely to use the Borough's town centres for these purposes. Proximity is cited by 2/3 of residents as the reason for choosing where to access convenience goods and services (good range of products was cited as a reason by 33% of residents), with almost all panel members travelling less than 1 mile to access convenience goods and services.
- Residents in South of the Borough are the most likely to visit local shopping centres for convenience goods and services (53% compared to a Borough average of 31%). Therefore, despite the concerns expressed about access, approximately half of South of the Borough residents visit their local shopping centres to undertake convenience goods shopping and to access services.

5.21 In order to ensure statistical reliability MORI did not consider centre specific issues. However, analysis of their data does identify some interesting centre specific points (even if they are not statistically reliable). The sections below set out some of the key points.

Satisfaction with the centre

- Whilst there are generally high levels of satisfaction with the Borough's local centres, more South of the Borough residents expressed dissatisfaction than those in other neighbourhoods (especially residents in Chessington North and Hook Parade). Although, even in these cases dissatisfaction was comparatively low and represented only 14% of respondents.
- The degree of satisfaction is evident from residents' differing loyalty to their local centre as the location of choice for top-up convenience shopping. Approximately 1/2 of the centres are the main choice of location, with Hook Parade recording the highest proportion (71%). Hook Parade is home to a Tesco Metro and a Budgens store. However, some centres are the main choice for low proportions of catchment area residents. The following 4 centres record less than 20% market share: Ace of Spades; Chiltern Drive; Kingston Vale and The Triangle. Residents in the Ace of Spades, Chiltern Drive and Kingston Vale catchments choose to predominantly visit one of the district centres. Residents in The Triangle catchment area tend to visit a standalone local convenience store. This situation may well change when the existing vacant outlets are redeveloped. Low proportions of residents (4%) choose to visit out-of-centre superstores for top-up convenience shopping.
- Where residents chose to access goods and services also indicates levels of satisfaction with the local centres. Overall the district centres are the main location of choice for residents. However, in South of the Borough, Hook Parade and Chessington North which both have a selection of banks and other services record proportions of local resident shoppers above 50%. Kingston Road West and Kings Road also score highly in this respect. Understandably some of the smaller centres score poorly in attracting residents for service related activities. Berrylands Road, Chiltern Drive, Red Lion Road and Villiers Road all score less than 20%.

Access

- Overall 2/3 of Borough residents walk to their local centre, and many centres achieve pedestrian shopper rates of around 80%. However, visits on foot are much less prevalent for the three South of the Borough centres. The proportion there is approximately 50% and access via the private car accounts for on average of 40% (a much higher proportion than the other neighbourhoods). The other centres that are accessed by significant proportions of car visitors are Kingston Vale, Robin Hood Way and South Lane, all of which have dedicated parking spaces, either completely separated from the highway or in Kingston Vale's case adjacent to the highway. Kingston Hill is the other centre with a high car clientele rate. A lack of parking facilities means visitors must park in the surrounding residential roads or in the nearby Hospital car park.
- With regards to residents' perceptions of how easy it is to get to the shops and services in the local centres, there are major differences. The centres that are considered to be easiest to navigate around are Alexandra Drive, Crescent Road, surprisingly Red Lion Road, Tudor Drive and Coombe Road. The three considered the least easy to navigate around are Ace of Spades, Ewell Road (South) and Kingston Road West. Interestingly Ewell Road North and Kingston Road East scored much better than Ewell Road South and Kingston Road West.
- An important component of accessibility is the ability to cross roads safely. Most centres scored reasonably well in this area, with Chiltern Drive, Kings Road, Plough Green, South Lane and Tudor Drive considered the best. At the other end of the spectrum are Robin Hood Way (located adjacent to the A3) and Ewell Road North which fared poorly. Given Ewell Road North's good performance regarding general accessibility (see above bullet) this finding is surprising and may indicate dissatisfaction with the current facilities for road crossing, which amount to 2 pelican crossings. In contrast, Ewell Road South has light controlled crossing points. However, the centre where it is considered most difficult to cross the road is Berrylands Road, which may be due to the narrow carriageway, narrow footways and on-street parking. These factors can cause congestion, in addition to the centre's proximity to the King Charles Road junction, which experiences vehicle tailbacks (including buses) to the centre's frontages.
- All centres with the exception of Ace of Spades and in particular Crescent Road are considered to be easily accessible by public transport. The provision of adequate car parking is extremely important for local centres and many rely on attracting passing trade for survival. The majority of centres are considered to lack sufficient car parking facilities. Predictably Kingston Hill (a centre without any dedicated parking), recorded the highest proportion of residents stating there was insufficient parking. Other centres associated with higher than average responses citing insufficient car parking are: Ewell Road North; Ewell Road South; two of the South of the Borough centres – Ace of Spades and Chessington North and two smaller centres, Kingston Vale (which has good quality car parking) and The Triangle. However, Cambridge Road East; Richmond Road; South Lane; Coombe Road and Crescent Road are all considered to have adequate parking facilities.
- The main reason for visiting a centre is overwhelmingly proximity to home. However, some centres fair better than others when it comes to catering for residents within a 400m 5 minute comfortable walking distance.

Generally, if residents are travelling 400m or less, they are visiting their nearest local centre. Journeys longer than this are to centres or facilities elsewhere. Most centres attract at least 1/3 of residents from within 400m. Some do much better than this such as Kings Road (which has a Coop foodstore), Cambridge Road (which has no car parking) and The Triangle. Catchment areas where residents are travelling in excess of 1 mile to visit a convenience store (and are therefore not making their closest local centre first choice) are associated with Alexandra Drive, Chiltern Drive, Kingston Hill and Kingston Vale, all of which lack a suitably sized convenience store.

Range of Shops/Services

- By and large the Borough’s local centres are considered to have a poor range of shops and services. Chiltern Drive, Crescent Road, Malden Manor and South Lane are all considered poor examples. Although, there are a number of centres that are thought to have a good range of shops. The two with the most support are Park Road and Richmond Road.

Quality of the Environment

- Overall, it is considered that the quality of the local centres’ environment could be improved. Only a couple of centres – Kingston Vale and Richmond Road received very positive responses. The centres considered to have the poorest environmental quality are Chiltern Drive and Red Lion Road.

Table 12: Healthcheck Conclusions

Kingston Town	
Cambridge Road East	<p>The shopping and service provision on Cambridge Road is provided in three separate parades with the middle parade being the designated local centre. However, this local centre supports just nine outlets of very limited range that does not justify designation as a local centre. However, the Cambridge Road catchment includes some of the most socially deprived parts of the Borough, and is an area that would benefit from good quality, convenient local shopping and services. Like the other two parades on Cambridge Road the local centre lacks any dedicated parking. The most easterly of the three shopping areas is the largest with the broadest range of shops and services. It is modest in scale but is approx. 6 outlets bigger than the designated Cambridge Road centre (and bigger than other local centres elsewhere in the Borough).</p> <p>Outlook: The existing parade does not function as a local centre and should be re-designated as a neighbourhood parade. The larger, more successful Cambridge Road parade, located a few hundred metres to the north should be designated as the Cambridge Road local centre.</p>
Coombe Road	<p>This linear centre is located on a moderately busy road and is a late Victorian/Edwardian purpose built centre. It supports 24 outlets in a catchment area containing a relatively high population which was supplemented in recent years by some large apartment developments. There is a good range of shop and service provision, although it lacks a main convenience store. The centre is close to Kingston Hospital and Norbiton Station, but also has catchment area overlap with Kingston Hill/Park Road. The Asda superstore on London Road is nearby. Whilst the vacancy rate indicates the centre is struggling, this is largely restricted to the western most parade, with the eastern-most parade appearing to trade strongly. The centre may continue to strengthen.</p> <p>Outlook: The catchment overlap may reduce the viability of a centre of this size in the medium to long term, and could justify consolidation and redevelopment opportunities. However, the provision of a suitably sized convenience store in the centre would help enhance the centre’s viability.</p>

Kings Road	<p>Located on a relatively quiet residential road this centre is linear in form, and spaced out over a number of short parades. It is anchored by a Coop convenience store and has a wide range of service activity, but very little other retail provision. There are a number of residential outlets interspersed with the commercial uses, which reduces the centre's attraction. Limited on-street parking is available.</p> <p>Outlook: Will continue to trade satisfactorily provided the Coop store remains.</p>
Kingston Hill North	<p>A very small centre close to Kingston Hospital with just 7 outlets. It has no convenience store and other than the post office and newsagent, there is not a range of services. There is some overlap in provision with the Hospital shop and facilities. There is no parking, with visitors required to park in the surrounding, congested residential roads.</p> <p>Outlook: This centre does not provide the range of facilities identified by PPS6, and is in reality a neighbourhood parade. It should be down-graded to neighbourhood parade status for the reasons mentioned above.</p>
Kingston Hill South/ Park Rd	<p>The centre as currently defined has a range of convenience and more specialist provision on the relatively quiet Park Road. There is limited on-street parking available and the shops appear to trade satisfactorily. The centre in practice is not confined to Park Road and extends up Kingston Hill and along London Road as far as the railway bridge. Although the stores are generally of a specialist nature – Majestic Wine and the Bathroom Store, the petrol filling station does provide a Spar convenience store. The catchment area is of a good size containing nearly 2,000 households.</p> <p>Outlook: Expand this centre to include the areas immediately east and west of the Kingston Hill roundabout.</p>
Kingston Road West	<p>This centre is located on a busy main road and largely comprises specialist stores that benefit from the passing trade. It is opposite the Sainsbury's Homebase and other retail warehouses in the St John's Road Estate. It lacks a main anchor convenience store, but is compact and has a low vacancy rate and appears to be trading reasonably well. The shops are set back from the roadway and the wide footway area serves as a parking area, although this may not be legitimate.</p> <p>Outlook: This centre is likely to continue to trade reasonably well as long as parking arrangements remain, as many of the stores are specialist attracting trade from beyond the local catchment area.</p>
Richmond Road South	<p>This is a linear centre on a busy road. Whilst it has some day-to-day convenience provision, its focus is much more on cafes, restaurants, takeaways. It also has more specialist stores such as a picture framing store than is the case in most other local centres. The specialist stores and the food and drink outlets no doubt trade there because of opportunity to attract passing trade, as well as the local walk-in custom. The centre does not have dedicated parking.</p> <p>Outlook: Continue to trade successfully.</p>
Surbiton Road	<p>This is an improving medium to large centre (41 outlets) located on a busy route between Kingston and Surbiton town centres. However, its catchment area, which is significantly higher than the average (1,400 households) does not overlap with these or any other centre. The centre provides a good range of convenience shopping and services, with a few specialist stores, including the recent interesting addition of two clothing stores. The centre has a high proportion of fast food outlets, indeed more than all other centres, which may reflect the proximity to the Penrhyn Road Kingston University campus. The centre has very limited parking provision, but has a very low vacancy rate.</p> <p>Outlook: This centre has improved in recent times and is likely to sustain this trend. Although, the high proportion of take away outlets and the need for more on-street</p>

	parking will reduce the opportunity for the centre to improve its range and quality in the same way other centres have e.g. Ewell Road North and Ewell Road South.
Tudor Drive	<p>A purpose built centre supporting 7 outlets which provides a range of convenience shopping and service facilities. Although there are no restaurant or other leisure facilities. The centre is located on a relatively quiet road, and is served by a dedicated access road with ample off-street parking. It is also on a bus route with a bus stop at the centre of the parade. There has been a loss of 1 outlet to office use, but the centre trades successfully.</p> <p>Outlook: Continue to trade successfully.</p>
Maldens & Coombe	
Burlington Road	<p>This centre is approximately the same size as Kingston Road East, and caters in large part for the Korean community (a trend that has continued in recent years). It has the same wide range of facilities consistent with a local centre, but has a larger than average number of restaurants. Its location on a main road helps to attract visitors from a wider catchment, and the on-street parking, albeit limited, means that the stores and services can benefit from the passing trade. Whilst the shop frontages are generally poorly maintained, vacancy rates are low. The centre has no catchment area overlap and appears to trade reasonably well.</p> <p>Outlook: This centre will continue to trade reasonably well as it has a discrete catchment area. It benefits from passing trade and caters in large part for the established Korean community.</p>
Crescent Road	<p>This is a small centre with just 6 outlets located on a quiet residential street off Kingston Road. The centre serves the densely developed Kingsnympton Estate, which has a socially deprived demographic. The centre was purpose built, and has an A1 convenience store, newsagents and dry cleaners. Although very small, it does provide the mix of shops and services required. It has dedicated off-street parking and is serving a disadvantaged resident population.</p> <p>Outlook: This centre will continue to trade satisfactorily, but could improve if signage was introduced on Kingston Hill to attract in more passing trade.</p>
Kingston Road East	<p>This centre is located close to Kingston Road West, but is very different. It has more outlets, but is interspersed with a number of residential outlets between the shops and service outlets. A large proportion of the outlets are ethnic food and service stores serving the Korean community, and the range matches the scope for a local centre. The key difference between Kingston Road West and Kingston Road East is that there is no parking provision associated with Kingston Road East. This factor impacts on the centre's success. However, there is evidently sufficient walk-in trade to maintain viability.</p> <p>Outlook: The centre will continue to struggle, mainly because the lack of parking. Despite its location on a busy road it is unable to take advantage of its position.</p>
Kingston Vale	<p>This is the smallest centre with just 5 outlets. However, all 5 provide the types of shops and services required for identification as a local centre. The centre has a limited amount of chevron on-street parking which is well set back from the busy carriageway, which provides the opportunity to benefit from passing trade. The stores and services are trading well which is evident from the quality of the shop facades and building frontages.</p> <p>Outlook: Very successful centre that will continue to trade well. The centre's boundary should be expanded to include the site of the former petrol filling station site to the west of the centre. The site provides the opportunity to expand retail/service offer.</p>

Malden Manor	<p>Another small, post war, purpose built centre which provides a parade of 12 outlets. It has a small convenience store and a range of other provision catering for the local catchment. This centre has virtually no catchment area overlap and as well as the railway station being located close by, it is a focal point for the surrounding residential areas. The parade has a dedicated service road with ample off-highway parking, but is located on a quiet residential road with little opportunity to benefit from passing trade. The centre appears to be trading reasonably successfully.</p> <p>Outlook: The centre will continue to trade reasonably well.</p>
Plough Green	<p>This medium sized centre (20 outlets) is located on a busy main road and is anchored by a large Coop convenience store. It has a range of shops and services catering for the local catchment. Although Plough Green is on a busy road, there is no dedicated parking to allow the stores to benefit. They must rely on local walk-in trade, or visitors by car finding parking spaces in the nearby residential roads and/or in the pub car park opposite. With specific regard to the Coop store, it caters for some main food shopping trips but has no parking provision. It is understood that shoppers routinely park in the pub car park and take the trolleys across the busy road after shopping trips. The presence of the Coop store, which looks modern and well appointed is no doubt a key factor in the successful trading of the centre.</p> <p>Outlook: The continued trading of the Coop store is the critical factor in the centre's continued trading success.</p>
Robin Hood Way	<p>A small purpose built centre with just 8 outlets fronting on to the A3. It is accessed by a local residential road and a slip road off the A3. The centre contains 2 ethnic foodstores, a golf store and a car accessories store, all of which are specialist requiring the prominence on the A3 to attract trade. None of the outlets provide the range of day-to-day goods and services normally associated with local centres. There is ample on-street parking.</p> <p>Outlook: The centre does not perform a local centre role, and like a number of other parades that front onto the A3, contains specialist stores that attract trade from a much wider catchment area. The centre should be re-designated a neighbourhood parade.</p>
South Lane	<p>This centre is a small post war purpose built centre. Although limited to just 8 outlets, it has a range of activities catering for the local community. The centre is on a quiet residential road with ample dedicated parking accessed off a service road. The shop frontages are in excellent condition and although the catchment population appears to be quite modest at around half the centre average (1,000 households), the centre appears to trade very successfully.</p> <p>Outlook: The centre has a good range of provision, ample off-road dedicated parking, has no catchment area overlap and although small in scale, is likely to continue to trade very well.</p>
The Triangle	<p>A small purpose built centre with 12 outlets on a quiet residential road, dedicated off-street parking and on a bus route with a stop in the centre. The centre provides a range of day-to-day convenience shopping and service facilities, but no longer has a convenience store, with the closure of the mini-mart some time ago. There are 4 vacant outlets in the centre, three of which are located together and appear to be long term vacancies. The large car showroom within the centre does not attract significant numbers of visitors, and this combined with the centre's location away from a busy road means it does not attract passing trade.</p> <p>Outlook: Trading in the centre has been affected by the loss of the convenience provision, and will only improve when the vacant outlets are redeveloped.</p>

South of the Borough	
Ace of Spades	<p>A moderately successful centre that is one of the largest in the Borough (51 outlets). It has a mix of day-to-day convenience stores and a number of specialist stores such as the large golf store on the northern arm of the Ace of Spades roundabout. The centre is unusual in that it straddles a junction on the A3 and is not wholly linear in form. The main parade is on the southeast quadrant of the A3 junction, and has dedicated parking in a service road and customer parking to the rear of the shops. Vacancy has remained consistent at approximately 10% over the past decade, which indicates a low to medium rate of occupancy turnover. The centre's location next to the busy Kingston Bypass and the busy Hook Road provides opportunity for high levels of passing trade. This factor is very important given that the catchment households number the local centre average (1,000), and the size of the centre is the second largest in the Borough.</p> <p>Outlook: It will continue to provide for both the needs of the local catchment population and the specialist needs of a much wider area (predominantly car visitors). Possible opportunities to enhance the trading prospect of the centre would be by increasing the number of households through any redevelopment opportunities.</p>
Chessington North Parade	<p>A very successful post war, purpose built, medium sized centre (21 outlets) It is anchored by a good sized Sainsbury Local store, and has plenty of good quality off-street dedicated car parking. Although not on a busy main road, the centre is visible from Bridge Road and Moor Lane, and is likely to benefit from passing trade. The centre has a very pleasant environment, is well located for bus routes and the nearby railway station, and does not have catchment area overlap. Although the catchment households (900) matches the average for the Borough's local centres. The good range of shopping and service provision includes a bank, but the focus in the centre is clearly on shopping facilities, with little for the evening – just one restaurant located close to the station. Vacancy rates are amongst the lowest recorded. This centre is the only local centre where the stores have rear servicing arrangements.</p> <p>Outlook: This centre is set to continue its very successful performance. Opportunities to increase the catchment area population, perhaps in the locality of the railway station would enhance the trading potential of the centre's stores, and aid possible expansion.</p>
Hook Parade/ Elm Road	<p>A reasonably successful centre which has attracted some major multiple retailers. It benefits from the opportunity for considerable passing trade and the provision of ample dedicated off-highway parking (mostly provided in service roads). The centre is large by local centre standards (32 outlets), catering very well for the needs of the local catchment. Like it's South of the Borough neighbour, Chessington North, it is something of a hybrid between a local centre and a district centre. The catchment population, like the two other South of the Borough centres is close to the Borough local centre average (1,000). Budgens and Tesco are good quality anchors, but both stores are relatively modest in size, at least by district centre standards. Vacancy rates were low at the time of the survey, but have risen in more recent times. The very recent loss of Woolworths, one of the centre's key anchor stores will weaken its attraction.</p> <p>Outlook: The 'hybrid' role of the centre would be significantly enhanced by a larger anchor convenience store. The recent loss of Woolworths may provide an opportunity, however. The only other location that may offer up redevelopment opportunity is the site occupied by the post office and the Working Men's Club. Any potential to increase the catchment population through appropriate redevelopment will help sustain the centre's vitality and viability.</p>

Surbiton	
Alexandra Drive	<p>This is a successful mid-sized centre (17 outlets) that is located on a quiet residential road, and serves a modest local catchment of 600 households. It has no catchment overlap with other centres. The post war centre was purpose built and has very well presented shop fronts and dedicated car parking in the service road. There is a range of convenience provision including a Spar store, dry cleaners, laundrette, post office and chemist. Vacancy rates at 6% (i.e. just one outlet) are very low.</p> <p>Outlook: The centre will continue to trade successfully due to the broad range of facilities and the lack of overlapping catchment areas. There is little prospect for growth or expansion.</p>
Berrylands Road	<p>This is one of the smaller centres in the Borough (12 outlets), but is fast improving. It has diversified more than most into catering for the night time economy. It contains the range of day-to-day convenience provision required of local centres, including a reasonably sized convenience store. The centre has a large catchment population (1,800 households), although there is considerable overlap with the Borough's biggest and strongest local centre, Ewell Road North. The environment is a drawback for this centre, due principally to the narrowness of the highway and the traffic congestion (which includes buses that pass along Berrylands Road). Vacancy rates have reduced since 2003.</p> <p>Outlook: This centre will continue to serve both the convenience and the night-time economy needs of the catchment population. The car showroom on the edge of the centre that has been vacated could provide opportunity for expansion of retail or evening economy uses.</p>
Chiltern Drive	<p>This centre, along with Red Lion Road, is the most poorly performing of all the Borough's local centres. It is a mid-sized local centre with 22 outlets in a purpose built parade which sweeps down the incline terminating at Berrylands Railway Station. It is on a quiet residential road that brings no opportunity for passing trade. Vacancy is running at 40%, which is due to the poor access and linkages, low catchment population (470 households), poor environment and the lack of a good anchor store. The centre has lost its critical mass of retail attractions. B1 office uses have replaced A1 retail uses which reduces the overall attraction of the centre. It also discourages other retailers to either stay or locate in the centre. The railway station is not delivering benefits, and the centre is in need of renewal.</p> <p>Outlook: Continued decline unless a strategy is developed to expand the catchment population and/or consolidate the retail activity in a particular area, and allow change of use in other parts of the centre. Higher density residential redevelopment could be appropriate given the location adjacent to the station. The delivery of more frequent rail services, from two to four services per hour, would make higher density residential outlets more viable. As would a reduction in the odours that emanate from the sewage treatment works. Addressing this problem is something Thames Water have on their agenda to carry out in the near future.</p>
Ewell Road North	<p>This is a very successful and large centre (the Borough's largest local centre with 55 outlets). Unlike all other local centres, with the exception of just Ewell Road South and Richmond Road, this centre combines the provision of the day-to-day requirements of the local catchment, with an attractive range of restaurants and a good selection of specialist retailers. The convenience provision includes a medium sized convenience store, delicatessen and butchers, but extends to a pharmacy and Chinese Herbal Medicine outlet. The specialist stores include a bike shop, antique shop and music shop, and these benefit from the opportunity to attract passing trade. Although, there is only limited on-street parking available. The catchment area, albeit overlapping with Ewell Road South has the highest number of households of any of the local centres at just over 2,000. Vacancy rates at just 5% are amongst the lowest recorded. Surbiton Hospital's main entrance is located within the local centre.</p>

	<p>Outlook: Continued success due to the diversity of the offer, the large resident catchment and the opportunity for passing trade. Redevelopment opportunities that increase the catchment population would be likely to enhance the centre and could encourage better convenience store provision. This centre is in greatest need of a modestly sized foodstore. Possible sites for a foodstore could be the Surbiton Hospital Ewell Road frontage.</p>
Ewell Road South	<p>Like its counter-part to the north, this is a very successful and large centre (49 outlets). It combines providing for the day-to-day requirements of the local catchment with an attractive range of restaurants and a selection of specialist retailers. The centre is successful despite the lack of a reasonably sized convenience store. The centre benefits from its location on a busy main road, although, there is only very limited on-street parking. Some parades, notably the one where most of the restaurants congregate, has very wide spaces between the building line and the roadway, which the restaurateurs has made good use of. The catchment area households are above average in number (1,300), but the centre has catchment area overlap with Ewell Road North and Red Lion Road.</p> <p>Outlook: The success of the centre is likely to continue given its diversity and niche in providing for the evening economy. This would be enhanced by the addition of a suitably sized convenience store.</p>
Red Lion Road	<p>This centre no longer functions as a local centre, and has declined and performed poorly due to competition from other centres such as Ewell Road (South) and nearby Tolworth in particular. It also performs poorly because of the low environmental quality. Of the 12 outlets, only a few are in shop or service use, and whilst there are 2 convenience stores these are very small. The only other uses are a café and laundrette. These activities are spread out over a number of parades interspersed with residential and commercial uses. There is an entrance to Tolworth Hospital located opposite, which could draw in visitors. Red Lion Road is moderately busy, but not as busy as the nearby Ewell Road South, and provides only very limited on-street parking.</p> <p>Outlook: This centre has contracted to the point where it clearly does not function as a local centre and it should no longer be classified as such.</p>
Villiers Avenue	<p>This is a small centre of just 8 outlets. It lacks a convenience store, but has a range of the shops and services associated with local centres. Villiers Road is a fairly quiet road, which may generate some passing trade, but most of the trade will be from a local catchment population that is just over the local centre average. The centre benefits from the provision of ample on-street parking bays, and only 1 outlet was vacant at the time of the survey. The centre is small, but appears to trade successfully.</p> <p>Outlook: The small size of the centre, but marginally above average catchment (with no overlap) suggests it will continue to trade successfully. No obvious prospect for expansion.</p>

6 CONCLUSIONS AND RECOMMENDATIONS

6.1 As explained in Chapter 1, this part of the study draws conclusions and makes recommendations. This has been done by relating the outcomes to the original study objectives.

6.2 **Study Objective 1** was to review the existing network of local shopping centres and service provision, identify areas of local convenience shopping deficiency, and to indicate how gaps in provision could be addressed. The study has:

- Mapped and reviewed the existing network and identified that overall, 2/3 of Borough households have access to convenience shopping provision within a short walking distance (400m).
- 8 areas of deficiency have been identified where there are over 1,000 households without access to convenience shopping provision, and where future provision of small convenience stores could be targeted to address this need.
- In the 3 largest deficiency areas where there are over 2,000 households without access to convenience goods provision, this study identifies where new provision would best be located to address the deficiency.

6.3 **Study Objective 2** was to assess the health of the Borough's 28 local centres. The study has:

- Reviewed the health of each centre using a combination of quantitative indicators such as vacancy, the mix of use class activity, and also qualitative data on residents' views and behaviour derived from a Residents' Survey.

6.4 The assessment has established

- Overall
 - the local centres continue to be well used;
 - their roles and functions continue to adapt – increasing leisure uses replacing A1 shopping activity;
 - convenience goods provision remains key component :
 - centres mainly serve a top-up role (42% of households use a local centre at least once a week),
 - the centres do also provide a main food shopping role with 1/4 of households undertaking a weekly main food shop in a local centre;
 - only 8 centres have a store >150m² gross – including all three in South of the Borough.
- At the neighbourhood level -
 - The local centres are especially important in South of the Borough where they fulfil a role more akin to a District Centre
 - South of the Borough households are most dissatisfied with the existing provision.
 - Local centres in South of the Borough should be the focus for future intensification & enhancements, especially access improvements.

- Encourage provision of more key anchor stores. The best performing local centres have the larger convenience stores, albeit South of the Borough residents are the most dissatisfied.
- There is a wide range of centre performance with some such as Alexandra Drive, Chessington North Parade and Kingston Vale performing very well and others such as Chiltern Drive and Red Lion Road performing very poorly.
- Table 12 in the report summarises the health and performance of each centre. It also identifies their outlook, and where appropriate what scope there is for improvement.

6.5 **Study Objective 3** was to establish what makes successful local centres, and examine opportunities to enhance and strengthen the existing centres. The study has:

- Identified the key determinants of success -
 - Inclusion of an adequately sized convenience store – 150m²+ gross. Only 8 local centres currently have this level of provision;
 - Prominent location - opportunity to attract passing trade;
 - Adequate parking provision – ideally separated from the highway;
 - Minimal catchment area overlap (1,000+ households supports 20 outlets);
 - Good quality pedestrian environment, with sufficient road crossing points;
 - Broad range of retail, service and evening economy attractions e.g. A3 and A5 uses.

6.6 **Study Objective 4** was to identify if there are centres that do not function as local centres, and should be downgraded to neighbourhood parade status. The study has:

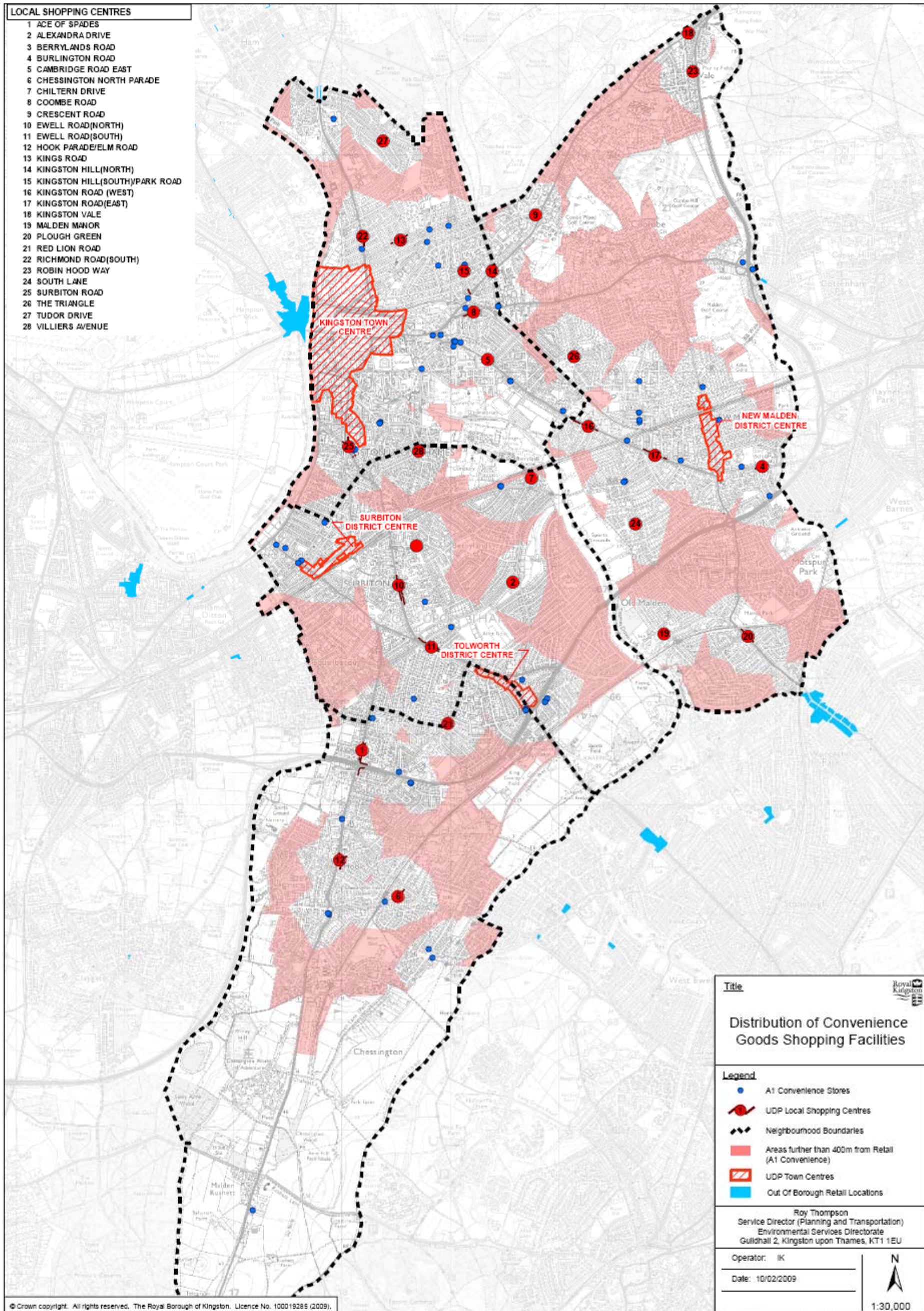
- Identified the following as centres that no longer provide the shops and service function associated with the local centre role and should be re-designated neighbourhood parades :
 - Cambridge Road East (to be replaced by the larger Cambridge Road parade to the north)
 - Kingston Hill North
 - Red Lion Road
 - Robin Hood Way

(N.B: Downgrading to neighbourhood parade status is significant in terms of “town centre” status, and the 4 centres above would lose their ‘centre’ role, but the critical convenience goods shopping function can continue to benefit from policy protection. Therefore, downgrading would not change the policy protection afforded to convenience stores. Although it could be argued that convenience stores are more viable in centres than in standalone locations. However, we counter that view by reference to the existing large number of standalone convenience stores. Gilders Road was downgraded in 2005 – it has retained a newsagents and one or two other units)

- Centres in particular need of significant support and intervention are –
 - Chiltern Drive
 - Kingston Road East
 - Burlington Road
- Centres requiring boundary review are:
 - Cambridge Road - replacement
 - Kingston Hill/Park Road - expansion
 - Kingston Vale – expansion

APPENICES

APPENDIX 1: Distribution of Convenience Goods Shopping Facilities



APPENDIX 2: A1 Convenience Catchment Areas

Centre Number and Name	Neighbourhood	Catchment Area Households	Catchment Area Overlap (centres)	Catchment Area Overlap (households)
1 Ace of Spades	South of the Borough	1082	No overlap	N/A
2 Alexandra Drive	Surbiton	596	No overlap	N/A
3 Berrylands Road	Surbiton	1805	Ewell Road (N)	Ewell Road (N)=875
4 Burlington Road	Maldens and Coombe	787	No overlap	N/A
5 Cambridge Road (E)	Kingston Town	1710	Coombe Road	Coombe Road=313
6 Chessington North Parade	South of the Borough	910	Hook Parade/Elm Road	Hook Parade/Elm Road=13
7 Chiltern Drive	Surbiton	471	No overlap	N/A
8 Crescent Road	Maldens and Coombe	978	Kingston Hill North	Kingston Hill North=106
9 Ewell Road (N)	Surbiton	2081	Berrylands Road, Ewell Road (S)	Berrylands Road=875; Ewell Road South =273
10 Ewell Road (S)	Surbiton	1304	Ewell Road (N)	Ewell Road (N)=273
11 Hook Parade/Elm Road	South of the Borough	1100	Chess'ton North Parade	Chess'ton North Parade=13
12 Kingston Hill (N)	Kingston Town	1058	Crescent Road, Kingston Hill (S)/Park Road, Coombe Road	Crescent Road=106; Kingston Hill South/Park Road=624; Coombe Road=270
13 Kingston Hill/Park Road	Kingston Town	1900	Kingston Hill (N), Coombe Road	Kingston Hill (N)=624; Coombe Road=748
14 Kings Road	Kingston Town	1763	Richmond Road	Richmond Road (S)=617
15 Kingston Road (W)	Kingston Town	894	The Triangle, Kingston Road East	The Triangle=28; Kingston Road (East)=79
16 Kingston Road (E)	Maldens and Coombe	1448	Kingston Road West, South Lane	Kingston Road (West)=79; South Lane=2
17 Kingston Vale	Maldens and Coombe	337	Robin Hood Way	Robin Hood Way=212
18 Malden Manor	Maldens and Coombe	803	Plough Green	Plough Green=26
19 Plough Green	Maldens and Coombe	780	Malden Manor	Malden Manor=26
20 Red Lion Road	Surbiton	1160	No overlap	N/A
21 Richmond Road	Kingston Town	1259	Kings Road	Kings Road=617
22 Robin Hood Way	Maldens and Coombe	426	Kingston Vale	Kingston Vale=212
23 South Lane	Maldens and Coombe	525	Kingston Road (East)	Kingston Road (East)=2
24 Surbiton Road	Kingston Town	1400	Villiers Avenue	Villiers Avenue=6
25 The Triangle	Maldens and Coombe	838	Kingston Road (West)	Kingston Road (West)=28
26 Tudor Drive	Kingston Town	655	No overlap	N/A
27 Villiers Avenue	Surbiton	1178	Surbiton Road	Surbiton Road=6
28 Coombe Road	Kingston Town	1504	Kingston Hill (North), Cambridge Road East, Kingston Hill (South)/Park Road	Kingston Hill (N)=270; Cambridge Road East=313; Kingston Hill (South)/Park Road=748

APPENDIX 3: Use Classes and Vacancies 2007

Centre	Neighbourhood	No of Units in 02/03	No of Units in 07	A1	A1 Conv	A1 Comp	A2	A3	B1	D1	SG	Vacant	Other Units	Change in No. of Units Between 02/03 and 07	Change in % of Units Between 02/03 and 07
Cambridge Road (East)	Kingston Town	9	9	5	2	3	0	0	0	0	0	1	3	0	0
Coombe Road	Kingston Town	24	24	15	6	9	1	2	0	0	0	5	1	0	0
Kings Road	Kingston Town	14	15	6	2	4	0	0	1	0	3	4	1	1	7
Kingston Hill (North)	Kingston Town	7	7	5	4	1	0	0	0	0	1	0	1	0	0
Kingston Hill /Park Road	Kingston Town	28	20	9	1	8	2	2	0	0	2	3	2	-8	-29
Kingston Road (West)	Kingston Town	21	21	12	3	9	1	2	0	0	0	3	3	0	0
Richmond Road	Kingston Town	21	21	7	3	4	1	3	0	0	1	4	5	0	0
Surbiton Road	Kingston Town	41	41	20	5	15	2	4	1	0	7	2	5	0	0
Tudor Drive	Kingston Town	7	7	6	2	4	0	0	0	0	0	1	0	0	0
Kingston Town Total		172	165	85	28	57	7	13	2	0	14	23	21	-7	-4
Burlington Road	Maldens and Coombe	28	32	18	8	10	3	3	0	1	0	2	5	4	14
Crescent Road	Maldens and Coombe	6	6	4	1	3	0	0	0	0	0	2	0	0	0
Kingston Road (East)	Maldens and Coombe	23	33	12	6	6	0	5	0	1	2	0	13	10	43
Kingston Vale	Maldens and Coombe	5	5	4	2	2	0	0	0	1	0	0	0	0	0
Malden Manor	Maldens and Coombe	12	12	4	2	2	2	0	0	0	0	2	4	0	0
Plough Green	Maldens and Coombe	20	20	7	3	4	4	2	1	1	2	2	1	0	0
Robin Hood Way	Maldens and Coombe	8	8	4	2	2	0	0	0	2	1	0	1	0	0
South Lane	Maldens and Coombe	8	8	6	3	3	1	0	0	0	0	1	0	0	0
The Triangle	Maldens and Coombe	12	12	6	2	4	0	0	0	1	0	4	1	0	0
Maldens and Coombe Total		122	136	65	29	36	10	10	1	7	5	13	25	14	11
Ace of Spades	South of the Borough	44	51	24	3	21	2	4	2	0	3	6	10	7	16
Chessington North Parade	South of the Borough	21	21	10	4	6	5	3	0	1	1	1	0	0	0
Hook Parade/Elm Road	South of the Borough	31	32	17	7	10	6	1	0	1	2	2	3	1	3
South of the Borough Total		96	104	51	14	37	13	8	2	2	6	9	13	8	8
Alexandra Drive	Surbiton	17	17	10	3	7	2	1	0	1	2	1	0	0	0
Berrylands Road	Surbiton	14	14	7	3	4	0	2	2	0	1	1	1	0	0
Chiltern Drive	Surbiton	22	22	5	1	4	5	0	1	0	2	9	0	0	0
Ewell Road (North)	Surbiton	48	55	23	5	18	5	9	2	2	3	3	8	7	15
Ewell Road (South)	Surbiton	50	49	21	3	18	7	6	1	2	5	3	4	-1	-2
Red Lion Road	Surbiton	6	12	3	2	1	0	0	0	0	1	1	7	6	100
Villiers Avenue	Surbiton	8	8	5	3	2	0	0	0	0	1	1	1	0	0
Surbiton Total		165	177	74	20	54	19	18	6	5	15	19	21	12	7
Borough Total		555	582	275	91	184	49	49	11	14	40	64	80	27	5

APPENDIX 4: Monitoring Change in Vacancy 1989-2007

Centre	No in 1989	% in 1989	No in 1996	% in 1996	Change in No. Between 1989-1996	Change in % Between 1989-1996	No in 02/03	% in 02/03	Change in No Between 02/03-1996	Change in % Between 02/03-1996	No in 07	% in 07	Change in No Between 07 and 02/03	Change in % Between 07 and 02/03
Kingston Town Neighbourhood														
Cambridge Road East	1	20	2	22	1	2	2	22	0	0	1	11	-1	-11
Coombe Road	N/A	N/A	5	22	N/A	N/A	5	21	0	-1	5	21	0	0
Kings Road	0	0	2	15	2	15	3	21	1	6	4	27	1	6
Kingston Hill North	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Kingston Hill South/ Park Rd	0	0	2	7	2	7	1	4	-1	-3	3	15	2	11
Kingston Road West	0	0	2	10	2	10	0	0	-2	-10	3	14	3	14
Richmond Road South	2	11	4	19	2	8	3	14	-1	-5	4	19	1	5
Surbiton Road	0	0	3	7	3	7	1	2	-2	-5	2	5	1	3
Tudor Drive	0	0	0	0	0	0	0	0	0	0	1	14	1	14
Kingston Town Totals	3	3	20	11	17	5	15	9	-5	-2	23	14	8	5
Maldens & Coombe Neighbourhood														
Burlington Road	3	10	3	10	0	0	1	4	-2	-6	2	6	1	2
Crescent Road	0	0	0	0	0	0	0	0	0	0	2	33	2	33
Kingston Road East	2	10	1	4	-1	-6	1	4	0	0	0	0	-1	-4
Kingston Vale	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Malden Manor	2	17	5	42	3	25	1	8	-4	-34	2	17	1	9
Plough Green	0	0	2	11	2	11	2	10	0	-1	2	10	0	0
Robin Hood Way	2	18	3	30	1	12	1	13	-2	-17	0	0	-1	-13
South Lane	0	0	1	13	1	13	0	0	-1	-13	1	13	1	13
The Triangle	1	7	0	0	-1	-7	0	0	0	0	4	33	4	33
Maldens and Coombe Totals	10	7	15	12	5	5	6	4	-9	-8	13	12	7	8
South of the Borough Neighbourhood														
Ace of Spades	8	13	6	13	-2	0	5	11	-1	-2	6	12	1	1
Chessington North Parade	1	5	0	0	-1	-5	0	0	0	0	1	5	1	5
Hook Parade/Elm Road	0	0	5	16	5	16	0	0	-5	-16	2	6	2	6
South of the Borough Totals	9	6	11	10	2	4	5	4	-6	-6	9	8	4	4
Surbiton Neighbourhood														
Alexandra Drive	0	0	0	0	0	0	1	6	1	6	1	6	0	0
Berrylands Road	1	7	3	21	2	14	4	29	1	8	1	7	-3	-22
Chiltern Drive	0	0	3	14	3	14	6	27	3	13	9	41	3	14
Ewell Road North	1	2	4	9	3	7	4	8	0	-1	3	5	-1	-3
Ewell Road South	4	9	2	4	-2	-5	2	4	0	0	3	6	1	2
Red Lion Road	N/A	N/A	2	25	2	N/A	0	0	-2	-25	1	8	1	8
Villiers Avenue	0	0	2	25	2	25	2	25	0	0	1	13	-1	-12
Surbiton Totals	6	3	16	14	10	8	19	14	3	0	19	12	0	-2
Borough Totals	28	5	62	12	34	6	45	8	-17	-4	64	12	19	4

APPENDIX 5: Monitoring Change in A1 Provision 1989-2007

Centre	No in 1989	% in 1989	No in 1996	% in 1996	Change in No. Between 1989-1996	Change in % Between 1989-1996	No in 02/03	% in 02/03	Change in No Between 02/03-1996	Change in % Between 02/03-1996	No in 07	% in 07	Change in No Between 07 and 02/03	Change in % Between 07 and 02/03
Kingston Town Neighbourhood														
Cambridge Road East	8	80	5	56	-3	-24	4	44	-1	-12	5	56	1	12
Coombe Road	18	82	13	59	-5	-23	15	63	2	4	15	63	0	0
Kings Road	10	83	11	73	1	-10	6	43	-5	-30	6	40	0	-3
Kingston Hill North	5	63	5	63	0	0	5	71	0	8	5	71	0	0
Kingston Hill South/ Park Rd	13	54	14	45	1	-9	14	50	0	5	9	45	-5	-5
Kingston Road West	17	81	13	57	-4	-24	15	71	2	14	12	57	-3	-14
Richmond Road South	12	67	13	60	1	-7	14	67	1	7	7	33	-7	-34
Surbiton Road	24	62	22	54	-2	-8	23	56	1	2	20	49	-3	-7
Tudor Drive	7	100	7	100	0	0	6	86	-1	-14	6	86	0	0
Kingston Town Totals	114	75	103	63	-11	-12	102	61	-1	-2	85	56	-17	-6
Maldens & Coombe Neighbourhood														
Burlington Road	15	83	16	83	1	0	16	100	0	17	18	56	2	-44
Crescent Road	5	52	5	57	0	5	6	57	1	0	4	67	-2	10
Kingston Road East	16	76	15	60	-1	-16	14	61	-1	1	12	36	-2	-25
Kingston Vale	5	100	4	80	-1	-20	5	100	1	20	4	80	-1	-20
Malden Manor	9	75	5	42	-4	-33	6	50	1	8	4	33	-2	-17
Plough Green	15	79	11	58	-4	-21	12	60	1	2	7	35	-5	-25
Robin Hood Way	5	46	6	60	1	14	4	50	-2	-10	4	50	0	0
South Lane	8	100	7	88	-1	-12	8	100	1	12	6	75	-2	-25
The Triangle	9	64	8	61	-1	-3	9	75	1	14	6	50	-3	-25
Maldens and Coombe Totals	87	75	77	65	-10	-10	80	73	3	7	65	54	-15	-19
South of the Borough Neighbourhood														
Ace of Spades	21	45	23	52	2	7	25	57	2	5	24	47	-1	-10
Chessington North Parade	16	76	17	74	1	-2	16	76	-1	2	10	48	-6	-28
Hook Parade/Elm Road	24	75	14	33	-10	-42	21	68	7	35	17	53	-4	-15
South of the Borough Totals	61	65	54	53	-7	-12	62	67	8	14	51	49	-11	-18
Surbiton Neighbourhood														
Alexandra Drive	14	82	14	88	0	6	12	71	-2	-17	10	59	-2	-12
Berrylands Road	8	57	8	54	0	-3	5	36	-3	-18	7	50	2	14
Chiltern Drive	20	87	13	57	-7	-30	6	27	-7	-30	5	23	-1	-4
Ewell Road North	29	58	25	53	-4	-5	26	54	1	1	23	42	-3	-12
Ewell Road South	28	65	27	56	-1	-9	26	52	-1	-4	21	43	-5	-9
Red Lion Road	8	N/A	6	75	-2	N/A	4	67	-2	-8	3	25	-1	-42
Villiers Avenue	6	75	5	63	-1	-12	4	50	-1	-13	5	63	1	13
Surbiton Totals	113	61	98	64	-15	-8	83	51	-15	-13	74	44	-9	-7
Borough Totals	375	69	332	61	-43	-10	327	63	-5	2	275	51	-52	-12

APPENDIX 6: Number and Percentage of A1 Convenience Units 1993-2007

Centre	No in 1993	% in 1993	No in 2002/03	% in 2002/3	Change in No Between 2002/3-1993	Change in % Between 2002/3-1993	No in 2007	% in 2007	Change in No Between 2007 and 2002/3	Change in % Between 2007 and 2002/3
Kingston Town Neighbourhood										
Cambridge Road East	4	57	2	50	-2	-7	2	40	0	-10
Coombe Road	9	50	5	33	-4	-17	6	40	1	7
Kings Road	4	44	2	33	-2	-11	2	33	0	0
Kingston Hill North	5	100	4	80	-1	-20	4	80	0	0
Kingston Hill South/ Park Rd	3	23	3	21	0	-2	1	11	-2	-10
Kingston Road West	4	27	4	27	0	0	3	25	-1	-2
Richmond Road South	7	50	4	29	-3	-21	3	43	-1	14
Surbiton Road	6	26	4	17	-2	-9	5	25	1	8
Tudor Drive	2	29	2	33	0	4	2	33	0	0
Kingston Town Totals	44	45	30	36	-14	-9	28	37	-2	1
Maldens & Coombe Neighbourhood										
Burlington Road	6	35	4	25	-2	-10	8	44	4	19
Crescent Road	3	60	3	50	0	-10	1	25	-2	-25
Kingston Road East	6	40	7	50	1	10	6	50	-1	0
Kingston Vale	2	50	2	40	0	-10	2	50	0	10
Malden Manor	3	60	3	50	0	-10	2	50	-1	0
Plough Green	4	36	3	25	-1	-11	3	43	0	18
Robin Hood Way	4	67	3	75	-1	8	2	50	-1	-25
South Lane	6	86	5	63	-1	-23	3	50	-2	-13
The Triangle	3	38	3	33	0	-5	2	33	-1	0
Maldens and Coombe Totals	37	52	33	46	-4	-7	29	44	-4	-2
South of the Borough Neighbourhood										
Ace of Spades	6	26	4	16	-2	-10	3	13	-1	-3
Chessington North Parade	7	47	6	38	-1	-9	4	40	-2	2
Hook Parade/Elm Road	9	45	8	38	-1	-7	7	41	-1	3
South of the Borough Totals	22	39	18	31	-4	-9	14	31	-4	1
Surbiton Neighbourhood										
Alexandra Drive	6	40	4	33	-2	-7	3	30	-1	-3
Berrylands Road	3	50	2	67	-1	17	3	43	1	-24
Chiltern Drive	5	31	1	17	-4	-14	1	20	0	3
Ewell Road North	5	17	5	19	0	2	5	22	0	3
Ewell Road South	5	17	4	15	-1	-2	3	14	-1	-1
Red Lion Road	4	50	2	50	-2	0	2	67	0	17
Villiers Avenue	3	50	3	75	0	25	3	60	0	-15
Surbiton Totals	31	36	21	39	-10	3	20	37	-1	-3
Borough Totals	134	43	102	38	-32	-5	91	37	-11	-1

APPENDIX 7: Floorspace 2007

Centre Name	Neighbourhood	A1	A1 Conv	A1 Comp	A2	A3	B1	D1	SG	Vacant	Total
Cambridge Road East	Kingston Town	345	160	185	0	0	0	0	0	30	375
Coombe Road	Kingston Town	963	416	547	55	182	0	0	0	310	1510
Kings Road	Kingston Town	473	228	245	0	0	168	0	151	226	1018
Kingston Hill (North)	Kingston Town	360	247	113	0	0	0	0	58	0	418
Kingston Hill (South)/Park Road	Kingston Town	595	57	538	110	157	0	0	54	118	1034
Kingston Road (West)	Kingston Town	1225	204	1021	77	135	0	0	0	157	1594
Richmond Road	Kingston Town	484	224	260	48	222	0	0	46	219	1019
Surbiton Road	Kingston Town	1157	314	843	119	256	87	0	1109	120	2848
Tudor Drive	Kingston Town	379	184	195	0	0	0	0	0	91	470
Kingston Town Total		5981	2034	3947	409	952	255	0	1418	1271	10286
Burlington Road	Maldens and Coombe	1033	514	519	115	191	0	33	0	118	1490
Crescent Road	Maldens and Coombe	294	68	226	0	0	0	0	0	155	449
Kingston Road (East)	Maldens and Coombe	915	456	459	0	465	0	34	197	0	1611
Kingston Vale	Maldens and Coombe	282	169	113	0	0	0	60	0	0	342
Malden Manor	Maldens and Coombe	486	347	139	129	0	0	0	0	158	773
Plough Green	Maldens and Coombe	1083	720	363	229	160	66	46	164	205	1953
Robin Hood Way	Maldens and Coombe	588	389	199	0	0	0	112	151	0	851
South Lane	Maldens and Coombe	269	135	134	41	0	0	0	0	51	361
The Triangle	Maldens and Coombe	385	128	257	0	0	0	125	0	361	871
Maldens and Coombe Total		5335	2926	2409	514	816	66	410	512	1048	8701
Ace of Spades	South of the Borough	2721	389	2332	75	440	110	0	233	405	3984
Chessington North Parade	South of the Borough	1428	864	564	457	293	0	77	76	76	2407
Hook Parade/Elm Road	South of the Borough	2619	1561	1058	539	100	0	104	148	370	3880
South of the Borough Total		6768	2814	3954	1071	833	110	181	457	851	10271
Alexandra Drive	Surbiton	788	266	523	65	29	0	92	106	63	1143
Berrylands Road	Surbiton	323	117	206	0	141	176	0	70	342	1052
Chiltern Drive	Surbiton	286	54	232	340	0	80	0	116	501	1323
Ewell Road (North)	Surbiton	2156	399	1757	382	910	328	78	179	498	4531
Ewell Road (South)	Surbiton	1752	215	1537	389	483	107	97	1460	152	4440
Red Lion Road	Surbiton	127	95	31	0	0	0	0	259	51	437
Villiers Avenue	Surbiton	288	132	156	0	0	0	0	54	33	375
Surbiton Total		5720	1278	4442	1176	1563	691	267	2244	1640	13301
Borough Totals		23804	9052	14752	3170	4164	1122	858	4631	4810	42559

GLOSSARY

Comparison Stores/Outlets

Shops selling items which are bought after comparison with other goods. These are widely defined as including clothing, furniture and leather goods, household goods and other non-food retail and hire and repair services

Convenience Stores/Outlets

Shops selling those items which are usually purchased from shops on a regular basis, by virtue of their availability and convenience, rather than as a result of the comparison of products. The following broad categories of business are widely classified as convenience good shops: grocers (including supermarkets), other food retailers, and newsagents. See Comparison Goods.

Use Class A1

Shops

Use Class A2

Financial and Professional Services (e.g. banks, estate agents)

Use Class A3

Restaurants and Cafes

Use Class A4

Drinking Establishments

Use Class A5

Hot Food Takeaway

Use Class B1

Business

a) Offices other than in a use within Class A2

b) Research and development – Laboratories, Studios

c) Light Industry

Use Class D1

Non-residential institutions (e.g. cinemas, sports halls)

Sui generis

Of its own kind (i.e. a use that does not fit into any of the other classes)

e.g. launderettes, car hire businesses