

# Royal Borough of Kingston upon Thames RETAIL CAPACITY STUDY - UPDATE



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Final Report  
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# 1 INTRODUCTION

## Background

- 1.1 In January 2006 the Royal Borough of Kingston upon Thames (RBK) commissioned Roger Tym & Partners (RTP) to update the Retail Capacity Statement prepared by RTP in July 2003.
- 1.2 The 2003 study identified that Kingston town centre supports 164,739 sqm net (241,378 sqm gross) of comparison goods retail floorspace, and concluded that at current market shares, there was expenditure potential to support an additional 20,000 square metres net (29,000 square metres gross) of comparison goods floorspace by 2006 and a further 28,000 square metres net (40,000 square metres gross) comparison goods floorspace by 2011. This level of growth equates to a 12% floorspace increase at 2006, and a 29% cumulative increase at 2011.
- 1.3 At adjusted market shares, which reflect development plans and aspirations elsewhere, the report concluded there was expenditure potential to support an additional 14,500 sqm net comparison floorspace (21,000 sqm gross) by 2006 and an additional 20,500 sqm net (29,000 sqm gross) by 2011.
- 1.4 With regard to convenience goods floorspace, the report concluded that there was expenditure growth available to support limited foodstore provision within the borough, of between 650 sqm net and 850 sqm net (1,000 sqm to 1,300 sqm gross) in each period.

## Study Aims and Approach

- 1.5 The aim of this study is to update the 2003 study that quantified convenience and comparison expenditure and floorspace requirements in 2002 (the base year), 2006 and 2011. This study updates the expenditure and floorspace requirements in the forecast years using new data and assumptions based on the latest expenditure data and changes in retail floorspace provision elsewhere. It also projects forward to 2016 both the quantitative comparison goods need for further retail development within Kingston Town Centre and the borough-wide convenience goods need.
- 1.6 The changes we incorporate in this study are as follows:
  - Use of the latest GLA and Surrey County Council population projections.
  - Use of the latest per capita expenditure estimates and expenditure growth rates.
  - Adoption of a refined approach using a combination of current and adjusted market shares to estimate the comparison goods growth potential.
  - Provision of an allowance for comparison goods expenditure inflows from beyond the Study Area.
  - Use of the latest information on growth in retail sales densities.
  - Examination of different convenience goods retail formats.

## Structure of the Report

- 1.7 Section 2 of our report sets out the quantitative needs assessment for comparison goods floorspace in the base year, 2002, and the three projection years 2006, 2011 and 2016.
- 1.8 Section 3 sets out the quantitative needs assessment for additional convenience goods floorspace to 2016.
- 1.9 In Section 4 we outline current retailer requirements for floorspace in Kingston.

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## 2 NEEDS ASSESSMENT - COMPARISON GOODS

2.1 In this section we set out our assessment of the need for additional comparison goods retail floorspace in Kingston town centre to 2016.

### Study Area

2.2 The Study Area for this update work is consistent with that used in the 2003 study. It was necessary to make minor changes to the zone configuration to reflect recent changes in ward-level geography. A zone plan and schedule of wards is shown at Appendix 1.

### Methodology

2.3 We have employed a step by step approach to the need assessment that is largely consistent with the methodology used in the 2003 study. A detailed outline of the methodology used for calculating additional comparison goods floorspace can be found in Chapter 4 of the RBK Retail Capacity Study (July 2003). There are some differences between this update and the earlier study in terms of methodology, data sources and assumptions used, and these are explained below.

2.4 The base year remains 2002 and all monetary values are held constant at 2000 prices thus enabling comparison with the 2003 study.

2.5 All the calculations are shown in Tables 1 to 8 in Appendix 2.

#### *Step 1: Establish the Base Year Position<sup>1</sup>*

2.6 The first step in this assessment is to establish the current trading position for Kingston town centre in the base year.

2.7 To do this we calculate:

- the quantum of expenditure in the Study Area;
- Kingston town centre's turnover derived from the Study Area and inflows from outside the Study Area; and
- Kingston town centre's total turnover and overall sales density.

2.8 The base year position is set out in Table 1 in Appendix 2.

2.9 The calculation of the expenditure potential has two components - population and per capita expenditure. In respect of population we have used the latest GLA 2005 Interim Ward Projections for the London wards, and the 2001 Census population for the Surrey wards, which has been projected forward to 2002 using district level population growth rates provided by Surrey County Council.

2.10 The population figures by zone are set out in Table 2 in Appendix 2 and show that in the base year, 2002, the population for the whole Study Area in 2002 was 1.25 million with the highest portion in Zone 1 (Kingston). The figure for the whole Study Area is close (some 20,000 lower) to the estimate in the previous study (1.27 million). Thus population data derived from the 2001 Census provides a close match to the previous population estimates that were projections based on 1991 Census data.

2.11 We have also used the latest available 2003 per capita expenditure estimates, taken from MapInfo our preferred expenditure data provider<sup>2</sup>. The methodology used for compiling the data has been significantly modified since the 2003 study and as such

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<sup>1</sup> A detailed methodology is outlined at Para 4.4 to Para 4.16 of the 2003 Study.

<sup>2</sup> MapInfo are recognised as being an industry standard provider of expenditure data and forecasts

the latest available MapInfo data differs from the data used in the previous study in a number of important respects. The main difference is that new data from the 2001 Census in respect of employment, and income (measured by occupation) has become available. This, plus the fact that MapInfo now utilise regional rather than national level consumer spending data, sourced from the ONS Regional Accounts means that the 2003 based per capita expenditure estimates are considered by RTP and others to be more accurate than the previous estimates used in the last study.

- 2.12 To ensure consistency with the 2003 study the 2003 data is converted to a 2000 price base and projected backwards to 2002 (the base year) using MapInfo expenditure growth rate projections<sup>3</sup>, which for 2002 to 2003 was the actual observed growth rate of 8.7%. The expenditure data is grown forwards to the projection years using the growth rates set out at paragraph 2.27 below.
- 2.13 A deduction of 7.6% is made to allow for special forms of trading (SFT). This is consistent with the deduction for SFT made in the 2003 study.
- 2.14 The resulting average per capita expenditure base year estimates of £3,479 (net of SFT) are significantly higher than the £2,592 figure in the 2003 study, and represent an increase of 34%. The uplift is the product of the improvements to the Census data and the availability of regional consumer spending data as outlined in paragraph 2.11.
- 2.15 Base year total comparison goods expenditure generated from within the Study Area for the update study compared to the 2003 study is outlined in Table 2.1 below.

**Table 2.1 Population and Expenditure in the Base Year**

	2003 Study	2006 Study	Differential
Population	1,271,351	1,248,203	-23,148
Average Per Capita Comparison Goods Expenditure (£)	2,592	3,479	887
Total Comparison Goods Expenditure (£M)	3,261.8	4,345.1	1,083.3

- 2.16 Despite the marginal drop in estimated population in the base year, the significant increase in estimated per capita expenditure means that total comparison goods expenditure for the Study Area in 2002 is £4,345 million for the present study compared to £3,262 million in the 2003 study, an increase of 33% or £1.08 billion.
- 2.17 We next calculate the proportion of comparison goods expenditure available for town centre locations, taking account of bulky goods, DIY and garden centre expenditure as per paragraph 4.12 of the original study.
- 2.18 To calculate Kingston's turnover from within the Study Area at the base year, we apply the current market shares from each of the Study Area Zones for Kingston, as determined by the Kingston Household Survey 2002, to the total available expenditure.
- 2.19 We also need to account for an inflow of expenditure from outside the Study Area. On the basis of penetration rates<sup>4</sup> for Kingston Town Centre (the proportion of shoppers that use Kingston town centre for their "high street" comparison goods shopping needs) we consider that a reasonable assumption is that 10% of the centre's turnover is derived from beyond the Study Area at the base year. This is consistent with the allowance for inflow in the previous study.
- 2.20 A summary of the differences in expenditure turnover between the 2003 and update studies is shown in Table 2.2. The final row shows the total turnover for Kingston Town

<sup>3</sup> MapInfo & Oxford Economic Forecasting: Information Brief 05/02 Goods Based Retail Expenditure Estimates and Prices Indices (September 2005).

<sup>4</sup> Source: Hillier Parker National Survey of Local Shopping Patterns. This is shown in Appendix 1 of the RBK Retail Capacity Study 2003.

Centre. This is £1.4 billion in this study, which is around 30% higher than the turnover in the previous study.

**Table 2.2 Expenditure and Turnover in the Base Year**

	2003 Study	2006 Study	Differential
Comparison Goods Expenditure (£m)	3,261.8	4,345.1	1,083.3
Deduction for Retail Warehousing (£m)	652.4	869.0	216.6
Town Centre Comparison Goods Expenditure (£m)	2,609.5	3,476.1	866.6
Kingston's turnover derived from Study Area (£m)	971.6	1,279.1	307.5
Inflow from outside Study Area (£m)	108.0	142.1	34.1
Kingston's Total Turnover (£m)	1,079.6	1,421.2	341.6

2.21 Finally we divide the total turnover by the net comparison goods sales area to derive the sales density achieved by existing shops, which gives an indication of the current performance of the centre as a whole. The previous study identified that Kingston town centre accommodates 164,739 sqm net of comparison goods floorspace, and there have been no significant changes since.

2.22 The turnover for Kingston Town Centre in the present study equates to a base year sales density of £8,627 per sqm, which is again around 30% higher than the sales density of £6,553 per sqm calculated in the 2003 study for the same year. This high base year sales density is consistent with qualitative perceptions of overtrading in Kingston at the time of our previous study.

2.23 We now move on in Step 2 to calculate the amount of expenditure growth generated in the Study Area in the projection years 2006, 2011 and 2016.

### *Step 2: Forecasting Population Change within the Study Area and Zones*

2.24 As with the base year, we have obtained the latest ward level population estimates from the GLA for the London wards for each of the projection years. In the Surrey wards, the 2001 Census population has been projected forward to 2006, 2011 and 2016 using borough level population growth rates provided by Surrey County Council. The ward level population estimates have then been aggregated up to zone level and are shown in Table 2 in Appendix 2.

2.25 Population is forecast to grow to 1.27 million in 2006, increasing to 1.29 million in 2011 and 1.31 million in 2016. These figures are marginally lower than the population estimates in the previous study. However, as the data for the present study is based on the 2001 Census, it is considered to be more accurate than the population projections used in the 2003 study which were derived from the 1991 Census.

### *Step 3: Forecasting Expenditure for the Study Area and Zones*

2.26 As with the base year data, the per capita comparison goods expenditure estimates for each of the Study Area zones were sourced from MapInfo TargetPro. Data for 2003 at 2003 prices was converted to a 2000 price base and then projected forwards to 2006, 2011 and 2016.

2.27 We have used new information on expenditure growth rates, sourced from MapInfo Information Brief 05/02 (September 2005). The comparison goods expenditure growth rates used in this assessment are as follows:

- 9.3% real growth for 2003-2004.
- 3.8% per annum projected growth for 2004-2006.
- 4.1% per annum projected growth for 2004-2011.

- 4.3% per annum projected growth for 2004-2016
- 2.28 These expenditure growth rates are similar to Experian Business Strategies' (EBS) forecasts of comparison goods growth, particularly in the shorter term. EBS show 9.2% real growth from 2003 to 2004<sup>5</sup> and forecast 3.9% p.a. and 3.6% p.a. comparison goods growth from 2004 to 2009 and 2014 respectively.
- 2.29 To reflect the expected continued growth in internet trading, we have used the same levels of deduction for SFT as in the 2003 study - Mapinfo 2002 estimate of 7.6% with 10% growth at each forecast year. These are as follows:
- 8.4% for 2006
  - 9.2% for 2011
  - 10.0% for 2016
- 2.30 The per capita comparison goods expenditure forecasts are set out in Table 3 in Appendix 2.
- 2.31 In 2006, the average per capita comparison goods expenditure figure net of SFT is £4,414, rising to £5,381 in 2011 and £6,672 in 2016. These figures are higher than those set out in the 2003 study due to the fact that in this study the base year per capita expenditure figure is higher, and this is then grown at a range of higher growth rates than in the previous study. Thus the higher per capita expenditure figures in the projection years in this study are the product of the higher starting position and higher growth rates than for the previous study.
- 2.32 The per capita expenditure growth rates used in the 2003 study were not as reliable as those used in this study. In particular there is a difference between the actual observed growth rates of around 9% from 2002 to 2004 which we have used in this study and the previously assumed expenditure growth rate of 3.6%. It is this key difference between growth achieved immediately after the base year compared with what was projected at the time which explains the major difference between the two sets of projections.

#### *Step 4: Total Expenditure Estimates and Growth*

- 2.33 Having calculated per capita expenditure for each of the Study Area zones we next move on to calculate the total available comparison expenditure in each zone by applying the population projections to per capita expenditure. The resulting total comparison expenditure estimates are presented in Table 4 in Appendix 2. This is summarised in Table 2.3 below, along with a comparison with the previous study.

**Table 2.3 Total Expenditure Estimates in the Projection Years (£m)**

	2003 Study	2006 Study	Differential
Total Expenditure 2006	3,825.5	5,603.9	1,778.4
Total Expenditure 2011	4,634.3	6,962.9	2,328.6
Total Expenditure 2016	-	8,753.4	-
Growth in Expenditure 2002 to 2006	563.7	1,258.9	695.2
Growth in Expenditure 2006 to 2011	808.8	1,358.9	550.1
Growth in Expenditure 2011 to 2016	-	1,790.5	-

- 2.34 Total expenditure for the Study Area is expected to grow by £2.6 billion from 2002 to 2011 compared to growth of £1.4 billion in the earlier study, and by £4.4 billion from 2002 to 2016. This level of growth is substantial and largely resultant from the national trend of continuing growth in per capita comparison goods expenditure and the population growth within some of the Study Area zones. Total expenditure is higher

<sup>5</sup> The EBS real growth rate is derived from EBS data on total spending on comparison goods and population shown in the EBS Retail Planner Briefing Notes.

than in the previous study in particular due to the high rates of observed expenditure growth compared to the lower growth levels previously assumed.

### *Step 5: Town Centre and Non Town Centre Expenditure Growth*

- 2.35 The previous study highlighted the fact that a portion of expenditure generated within the Study Area should be allocated for DIY and garden centre stores outside the town centre. Kingston has a mature retail system with a number of out of centre shopping destinations and thus attracts a high proportion of expenditure on DIY and garden centre goods. Accordingly, in the base year we estimate that 20% of expenditure would be attracted to retail warehouse formats in out of centre locations, as in the 2003 study.
- 2.36 New government policy suggests that it is not appropriate for such a high proportion of future expenditure growth to be directed towards out of centre locations. Therefore rather than allow for a continuation of this 20% figure, we consider that in the forecast years, a lower proportion of future expenditure growth will be directed towards garden centres and DIY outlets in out of centre locations. RTP have conducted research based on the ONS Consumer Trends publication to establish the proportion of total comparison spending that is undertaken in garden centres and DIY outlets. The research demonstrates that 2.5% of all comparison goods expenditure is made in garden centres and that 7.5% currently is spent on all DIY type products, with the combined proportion being 10%. This research is based on national expenditure data and there will be much local variation, but in our view it provides an indication on the proportion of comparison goods expenditure that is appropriate to locate outside town centres.
- 2.37 We have allocated 10% of total comparison goods expenditure growth to DIY/garden centre spending in non-town centre locations as it is inappropriate to plan for these forms of retailing in town centres.
- 2.38 The resulting expenditure growth figures for town centre and non-town centre retailing are set out in Table 5 in Appendix 2 and Table 2.4 below. The table demonstrates that in the period to 2016 comparison goods expenditure available for town centre retailing will grow by approximately £4 billion, with approximately £441 million available for non town centre locations.

**Table 2.4 Expenditure Growth for Town Centre and Non Town Centre Locations (£m)**

	2002 to 2006	2006 to 2011	2011 to 2016	2002 to 2016
Town Centre	1,133.0	1,223.1	1,611.5	3,967.5
Non Town Centre	125.9	135.9	179.1	440.8

### *Step 6: Total Available Expenditure for Kingston Town Centre*

- 2.39 The next step in the assessment is to calculate total available expenditure for existing and new retailing in Kingston town centre. This consists of two elements:
- the available expenditure from the Study Area based on the market shares for each zone; and
  - an allowance for inflow of expenditure from outside the Study Area.
- 2.40 In order to calculate available expenditure, we apply Kingston's market share for each zone to the available growth in expenditure for town centre locations. In the 2003 study we undertook the capacity study using two scenarios based on a) maintaining the existing market shares derived from the household survey; and b) by adjusting market shares downwards to reflect the future retail development requirements in neighbouring authorities. Whilst it is appropriate for Kingston to maintain its market share in the home zone, additional comparison floorspace in neighbouring centres could affect Kingston's influence over the Study Area in particular in the outer zones.

- 2.41 Additional comparison goods floorspace is planned for a number of neighbouring centres.
- Walton on Thames: Redevelopment of The Centre. Planning permission has been granted for a total of 16,832 sqm gross retail floorspace. This is assumed to be 100% comparison floorspace.
  - Croydon Gateway: Planning permission has been granted for mixed use development including 10,212 sqm of A1 comparison floorspace as well as convenience floorspace and food and drink uses.
  - Park Place (Croydon): planning permission has been granted for a four level department store and a three level shopping centre with 110 units. Total floorspace is 122,540 sqm of which over 75,000 sqm is A1 space.
  - Guildford: Planning permission has been granted for an extension of the Friary Centre to provide an additional 24,923 sqm gross retail floorspace. This is assumed to be 100% comparison floorspace.
  - Crawley Town Centre North: Master plan proposals have been published for a 14.2 hectare site to the north of the town centre. The scheme is expected to house approximately 65,000 sqm of retail development and be anchored by a department store.
- 2.42 In this study we have refined the approach using a combination of the two previous scenarios. Up to 2011, since it will not be possible to implement any major development much before 2011, we have adjusted the market share for Kingston town centre from each of the Study Area zones to levels which we believe reflect the likely impact of development within or adjacent to Kingston's catchment area in the short to medium term. The adjusted market shares take into account these new developments and proposals coming forward elsewhere, and build in an allowance for the future development requirements of neighbouring authorities.
- 2.43 After 2011, when we assume that new development will have taken place, we revert to the market shares observed by the 2002 household survey, to reflect the increased influence that additional comparison floorspace in Kingston Town Centre could have on the outer zones. We assume any additional retail floorspace will enhance Kingston's market share back to the levels observed through the 2002 Household Survey.
- 2.44 In the 2003 study we allowed for a 10% inflow of expenditure from outside the Study Area in the base year, based on the Hillier Parker National Survey of Local Shopping Patterns. No inflow was allowed in the projection years and we consider that it was inconsistent to allow an inflow in the base year and not to continue in the projection years. In this study we have revised this approach. We consider there will be a 5% inflow of expenditure up to 2011, which is lower than the base year inflow to reflect the impact of new developments coming forward elsewhere. After 2011, we raise the inflow back up to 10% to take into consideration the effect of new floorspace in Kingston on its draw from outside the Study Area.
- 2.45 From 2002 to 2016, inflow from outside the Study Area is expected to generate a total of £96 million additional expenditure.
- 2.46 Projected total comparison goods expenditure is illustrated in Table 6 (2006), Table 7 (2011) and Table 8 (2016) in Appendix 2.

**Table 2.5 Total comparison goods expenditure available to Kingston Town Centre (£m)**

Expenditure	2003 Study	2006 Study	Differential
2002 to 2006	190.7	355.7	165.0
2006 to 2011	275.4	387.9	112.5
2011 to 2016	-	665.9	-

- 2.47 Total available comparison goods expenditure is higher in the present study than in the 2003 study, with the difference reflecting, in particular, the higher expenditure growth rates achieved between 2002 and 2004 and the allowance for expenditure inflow.
- 2.48 The growth in the period 2011 to 2016 is considerably higher than the earlier periods. This is because, as explained above, Kingston is expected to retain a higher proportion of the available Study Area expenditure in that period.

***Step 7: Improved Efficiency of Existing Floorspace***

- 2.49 Not all expenditure growth is available for new floorspace. A proportion of the available expenditure for Kingston will be absorbed through improvements in the efficiency of the existing retail sales floorspace. A report by Experian Business Strategies for the GLA<sup>6</sup> indicates that sales density productivity growth could range from 1.5% per annum (the low case - and that used in the 2003 study) to 3.0% per annum (the high case). The report emphasises that historical estimates of trend productivity growth are national and not London specific, and that because of higher rents and other factors, productivity growth in London may have out-performed the national average in the past but may not continue to do so in the future. Experian's pan-London study takes a cautious approach by applying both the 2.5% and the 2.0% p.a. growth scenarios. However, because Experian's work demonstrates that there are quite pronounced differences between sales density growth in different centres and areas, and because it indicates London sales density rises out-perform the national average, we have used the upper end of the range suggested by Experian (3%). This approach reflects the current high sales density being achieved in Kingston and the implied high rate of sales density growth achieved.
- 2.50 Existing floorspace trades at an average of £8,627 per sqm in the base year. By 2006, it is expected to trade at £9,710 per sqm, rising to £11,256 per sqm in 2011 and £13,049 per sqm in 2016.
- 2.51 The effects of increasing the sales density of existing floorspace are shown in Table 2.6 below. In this study, the increased sales density will absorb £729 million from 2002 to 2016, leaving £651million residual expenditure for new comparison floorspace in Kingston Town Centre over the period to 2016.

**Table 2.6 Residual Expenditure (£m)**

		2003 Study <sup>7</sup>	2006 Study	Differential
2002 to 2006	Total Available Expenditure	190.7	355.7	165.0
	Deduction for Improved Sales Density	59.6	178.4	118.8
	Residual Expenditure	131.1	177.3	46.2
2006 to 2011	Total Available Expenditure	275.4	387.9	112.5
	Deduction for Improved Sales Density	79.7	254.8	175.1
	Residual Expenditure	195.7	133.2	-62.5
2011 to 2016	Total Available Expenditure	-	665.9	-
	Deduction for Improved Sales Density	-	295.3	-
	Residual Expenditure	-	370.5	-

<sup>6</sup> Experian Business Strategies for the GLA, "London Town Centre Assessment Stage 1 - Comparison Goods Floorspace Need", September 2004.

<sup>7</sup> Based on Scenario a) constant market shares.

### Step 8: Floorspace Growth Potential

- 2.52 The final step involves converting the residual available expenditure to a net new floorspace requirement. The current sales density of existing floorspace in the base year was £8,627 per sqm. This is high and indicates that comparison floorspace in Kingston town centre is currently overtrading. We consider that new floorspace in a major development incorporating a department store would trade at a lower sales density thereby effectively diluting current levels of overtrading in the centre. We have used a sales density for large scale modern development of £8,000 per sqm in 2006 and 2011, rising to £8,500 per sqm in 2016.
- 2.53 Applying these sales densities to the residual expenditure in the projection years gives the net floorspace growth potential, as is shown in Table 2.7 below. In the period to 2006, there is a requirement for approximately 22,200 sqm net of new floorspace. An additional 16,600 sqm net could be supported by 2011, and a further 43,600 sqm net by 2016. In summary therefore in addition to the current 164,739 sqm net (241,378 sqm gross) of comparison goods retail floorspace, we project a need for an additional 38,800 sqm net by 2011 (a 24% floorspace increase), with a further 43,600 sqm net thereafter (a cumulative floorspace increase of 50%).

**Table 2.7 Floorspace Growth Potential**

		2003 Study <sup>8</sup>	2006 Study	Differential	Cumulative Growth
2006	Residual Expenditure (£m)	131.1	177.3	46.2	
	Sales density of new floorspace (£/sqm)	6,500	8,000	1,500	
	Floorspace Growth Potential (sqm net)	20,166	22,162	1,996	22,162
2011	Residual Expenditure (£m)	195.7	133.2	-62.5	
	Sales density of new floorspace (£/sqm)	7,000	8,000	1,000	
	Floorspace Growth Potential (sqm net)	27,962	16,645	-11,317	38,807
2016	Residual Expenditure (£m)	-	370.5	-	-
	Sales density of new floorspace (£/sqm)	-	8,500	-	-
	Floorspace Growth Potential (sqm net)	-	43,591	-	82,398

### Conclusions on Comparison Goods Floorspace Capacity

- 2.54 As shown in Table 2.8 below, based on the future estimates of available expenditure, it is expected that there will be sufficient expenditure to support in the region of 22,200 sqm net of comparison goods floorspace in Kingston town centre by 2006. There is sufficient expenditure to support an additional 16,600 sqm net by 2011 and 43,600 sqm net by 2016. The cumulative comparison goods floorspace growth potential is therefore 38,800 sqm net by 2011 (a 24% floorspace increase), and 82,400 sqm net by 2016 (a cumulative increase of 50%).

<sup>8</sup> Based on Scenario a) constant market shares.

**Table 2.8 Comparison Goods Summary Outputs**

	2006	2011	2016
Total growth in expenditure (£m)	1,133.0	1,223.1	1,611.5
Available expenditure (£m)	338.7	369.5	605.3
Inflow from outside the Study Area (£m)	16.9	18.5	30.3
Total available expenditure (£m)	355.7	387.9	635.6
Deduction for improved sales density (£m)	178.4	254.8	295.3
Residual expenditure (£m)	177.3	133.2	340.3
Assumed sales density (£/sqm)	8,000	8,000	8,500
<b>Floorspace growth potential (sqm net)</b>	<b>22,162</b>	<b>16,645</b>	<b>43,591</b>

- 2.55 For comparability purposes with the previous study, we have provided separate floorspace growth figures for 2006 and 2011. In practice, given the lead time necessary for planning, detailed design and construction of any proposed development, it is unlikely that any new additional comparison goods floorspace will be completed before 2011. The growth potential for 2006 and 2011 should be considered as one. To 2011 there is potential for 38,800 sqm net floorspace, which equates to 55,400 sqm gross. The cumulative total floorspace potential is 82,400 sqm net (117,700 sqm gross) from 2002 to 2016.
- 2.56 It should be noted that development in the short term (i.e. to 2011) could have an effect on the longer term need, as any additional floorspace in Kingston will increase the deduction made for improved sales density, thus reducing the need in the longer term. Thus, depending on exactly how much comparison floorspace is built and let by 2011 (or thereabouts) an allowance will need to be taken of the potential increase in sales density.

**Table 2.9 Floorspace Growth Potential - Comparisons with the Original Study**

Floorspace growth potential (sqm net)	2003 Study <sup>9</sup>	2006 Study	Differential
2006	20,166	22,162	1,996
2011	27,962	16,645	-11,317
2016	-	43,591	-

- 2.57 The overall floorspace potential of 38,800 sqm net to 2011 is lower than that identified in the 2003 study (48,100 sqm net). In the previous study a greater floorspace potential was identified in the latter period, whereas in this study floorspace growth potential is greater in the early period to 2006 than in the following period to 2011. The main reason for the higher floorspace growth potential to 2006 is the high expenditure growth rates from 2002 to 2004 used in this study, as sourced from MapInfo. The reason for the lower floorspace requirement between 2006 and 2011 is the use of higher sales densities (and sales density growth) due to the increased base year estimate of turnover achieved.

## Sensitivity Test

- 2.58 The current buoyant economic cycle has continued since late 2003/early 2004. In this period consumer spending on comparison goods, reflecting an expanding UK economy, has continued at a high level. It is not axiomatic that this level of consumer spending will continue at a similarly high rate despite the relatively optimistic forecasts provided by Oxford Economic Forecasting and Experian Business Strategies.
- 2.59 It is evident that consumer spending has been partly fuelled by the availability of credit in recent years, either through property based borrowing (re-mortgaging or asset

<sup>9</sup> Based on Scenario a) constant market shares.

release) or the promotion of credit card spending. The recent increase in interest rates and the Bank of England's latest Inflation Report point to the prospect of both an increase in inflation and further hikes in interest rates. This will reduce the incidence of credit card spending and property related spending.

- 2.60 The effects of quite small changes in growth rates for consumer spending when compounded over 5-10 years can have significant implications for the quantum of additional retail floorspace which is required. Consequently, we have undertaken a sensitivity test on comparison goods expenditure growth to assess the implications of reduced consumer spending as a result of a general tightening of credit, associated with either further increases in interest rates or a downturn in the economy (or both). Another factor that will influence consumer spending in retail shops is the scale of change in internet purchases. The two key variables here are the propensity to shop 'on-line' and the rate of roll-out of broadband connections. There is insufficient hard evidence on the likely extent of changes on these points so we have not undertaken a sensitivity test on our core SFT assumptions.
- 2.61 Our sensitivity test is applied solely to comparison goods spending. The variations in rates of growth in consumer spending on convenience goods is far less extreme than for comparison goods expenditure and, additionally, less tied to an increase in debt.
- 2.62 There have been previous historic periods when a downturn in the economy has occurred between economically buoyant periods. These recessions are reflected in lower growth in per capita comparison goods expenditure sandwiched between periods of higher growth in expenditure. In the five year period 1980 to 1984 the average growth in per capita comparison goods expenditure was 3.5% per annum<sup>10</sup>. It then rose to over 6% per annum on average in the intervening period before declining to 2.2% per annum<sup>11</sup> in the five years between 1989 and 1993.
- 2.63 Accordingly, we have undertaken a sensitivity test to forecast comparison goods floorspace potential taking into consideration the implications of a five year downturn in comparison goods spending.
- 2.64 To represent a downturn in spending comparable to the periods 1980 to 1984 and 1989 to 1993 outlined above, we have reduced the per capita comparison goods expenditure growth rate from 2007 - 2011 to 3.0% per annum. For all other years we have used the MapInfo growth rates, as shown at paragraph 2.27.

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<sup>10</sup> Calculated from Data Consultancy Information Brief 98/2, Table 1.

<sup>11</sup> Calculated from MapInfo Information Brief 05/2, Table 1.

- 2.65 The implications of this reduced per capita comparison goods growth from 2007 to 2011 on expenditure and ultimately floorspace potential is shown in Table 2.10 below.

**Table 2.10 Economic Downturn Sensitivity Test: Floorspace Growth Potential**

		Original	Sensitivity Test	Differential
<b>2002 to 2006</b>	Residual Expenditure (£m)	177.3	177.3	0
	Floorspace Growth Potential (sqm net)	22,162	22,162	0
<b>2006 to 2011</b>	Residual Expenditure (£m)	133.2	40.9	92.3
	Floorspace Growth Potential (sqm net)	16,645	5,114	11,531
<b>2011 to 2016</b>	Residual Expenditure (£m)	370.5	298.3	72.2
	Floorspace Growth Potential (sqm net)	43,591	35,093	8,498
<b>2002 to 2016</b>	Residual Expenditure (£m)	681.0	516.5	164.5
	Floorspace Growth Potential (sqm net)	82,398	62,369	20,029

- 2.66 Reducing the expenditure growth rate to 3% between 2007 to 2011 has the effect of reducing the overall floorspace potential by 20,000 sqm net, to 62,000 sqm net in the period 2002 to 2016.
- 2.67 Clearly this sensitivity test does not influence the quantum of consumer spending which has been “accumulating” up to now (2006). However, any large scale development being progressed at the present time is unlikely to be built and occupied before 2011 or 2012. The implication, therefore, is that a large scale development being promoted currently may need to call upon some of the growth in spending in the early years in the period after 2011.



## 3 NEEDS ASSESSMENT - CONVENIENCE GOODS

- 3.1 In this section we set out our assessment of the need for additional convenience goods retail floorspace to 2016. Due to the more dispersed provision of convenience goods, and to replicate the method in the 2003 study this assessment considers the Borough-wide requirement.
- 3.2 As with the previous study, we adopt the position that convenience goods expenditure and floorspace are in equilibrium. This position is not unreasonable given the quantity and quality of the existing provision within the Borough's centres. Indeed the three District Centres all function primarily as convenience goods shopping centres and are successful in doing so.
- 3.3 All results are shown in Tables 9 to 12 in Appendix 4.

### Study Area

- 3.4 The Study Area for the convenience goods needs assessment is based on the Study Area defined in the 2003 study. The Study Area (illustrated on the map at Appendix 3) includes all the RBK wards, but also includes Long Ditton in Elmbridge and Hampton Wick in Richmond. This Study Area is selected to equate to the primary catchment area for convenience goods provision within the Borough.

### Methodology

- 3.5 We have employed an approach to the need assessment that is consistent with the methodology used in the 2003 study. A detailed outline of the methodology used for calculating additional comparison goods floorspace can be found in Chapter 4 of the RBK Retail Capacity Study (July 2003), from Para 4.54 to 4.68. In some cases the methodology, data sources and assumptions used here differ to those used in the original study. Where this is the case, we explain the differences.

#### *Step 1: Study Area Population*

- 3.6 The population estimates are the latest available ward-level population estimates and projections from the GLA12 for the whole of the convenience goods Study Area for the years 2002, 2006, 2011 and 2016. There is only one non-London ward in the convenience goods Study Area: Long Ditton in Elmbridge. To obtain population projections for this ward, the 2001 Census population has been projected forward using the Elmbridge Borough population forecasts provided by Surrey County Council.
- 3.7 The population data is shown in Table 9 in Appendix 4. This demonstrates that the Study Area population in 2002 was approximately 165,000. This is expected to rise by 3,000 by 2006, by a further 4,000 to 2011 and by 3,500 from 2011 to 2016. These figures are marginally lower than the population totals in the 2003 study a finding consistent with that for the comparison goods assessment. However, as the current data is sourced from the 2001 Census it is considered to be more accurate than previous estimates.

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<sup>12</sup> GLA "R2005 Interim Ward Projections".

**Table 3.1 Population - Comparisons with the Previous Study**

	2003 Study	2006 Study	Differential
2002	166,174	165,039	-1,135
2006	170,999	169,035	-1,964
2011	175,086	172,017	-3,069
2016	-	175,515	-

***Step 2: Expenditure Estimates and Growth***

- 3.8 We have used revised per capita convenience goods expenditure estimates and growth rates. The data obtained is the latest available, that is 2003 expenditure estimates at 2003 prices. In order to allow consistency with the previous study, this is converted to a 2000 price base.
- 3.9 The real and estimated growth rates set out in MapInfo Information Brief 05/02 (September 2005) and used in this assessment are as follows:
- 0.6% real growth for 2002-03
  - 1.6% real growth for 2003-04
  - 0.8% per annum projected growth for 2004-2011
  - 0.9% per annum projected growth for 2004-2016
- 3.10 A deduction of 0.9% is made from the per capita expenditure estimates to reflect spending via Special Forms of Trading (SFT). This is consistent with the 2003 study. The per capita convenience goods expenditure figures after deduction for SFT for the update and 2003 studies, are outlined in Table 3.2 below.

**Table 3.2 Per Capita Convenience Goods Expenditure (£)**

	2003 Study	2006 Study	Differential
2002	1,522	1,675	153
2006	1,540	1,739	199
2011	1,564	1,810	246
2016	-	1,906	-

- 3.11 The per capita expenditure figures used in the present study are higher than those used in the 2003 study. This is partially due to higher projected expenditure growth rates in the present study - forecast growth rates between 0.6% and 1.6% per annum compared to the 0.3% per annum growth rate in 2003. Furthermore, the data used in this study takes into account the 2001 Census data and Regional Accounts and is therefore considered to be more accurate than the previous data.
- 3.12 We next calculate the available convenience goods expenditure in the Study Area by applying the population projections to the per capita expenditure. The resulting total expenditure estimates for the Study Area, generated over the time horizon, are summarised below. Overall, convenience goods expenditure is projected to grow by £58 million in the period to 2016.

**Table 3.3 Convenience Goods Expenditure (£M)**

	2003 Study	2006 Study	Differential
Total Expenditure 2002	249.1	276.4	27.3
Total Expenditure 2006	259.5	292.3	32.8
Total Expenditure 2011	269.7	311.4	41.7
Total Expenditure 2016	-	334.6	
Growth in Expenditure 2002 to 2006	10.3	15.9	5.6
Growth in Expenditure 2006 to 2011	10.2	19.1	8.9
Growth in Expenditure 2011 to 2016	-	23.2	-

- 3.13 The projected expenditure growth for convenience goods in the current study is considerably higher than the previous study, due to the higher per capita expenditure rates used here. What is notable is that in the previous study, a similar magnitude of expenditure growth was forecast in both periods, whereas in the current study the growth in expenditure is greater in the latter years.

*Step 3: Expenditure Growth Available for Supermarkets and the Convenience Stores Sector*

- 3.14 Next we calculate the proportion of expenditure available for supermarkets and local convenience shopping, as per Para 4.64 and 4.65 of the previous study. The latest Expenditure and Food Survey<sup>13</sup> identifies that nationally supermarkets account for approximately 70% of convenience goods spending in retail outlets. Therefore, we allocate convenience goods expenditure growth available for supermarket and local convenience store on the basis of a 70:30 ratio. The resultant growth in expenditure is as follows:

**Table 3.4 Convenience Goods Expenditure Available for Local Convenience Stores and Supermarkets**

	2002 to 2006	2006 to 2011	2011 to 2016
Local Convenience Store Expenditure (£m)	4.8	5.7	7.0
Supermarket Expenditure (£m)	11.1	13.4	16.2

- 3.15 Over the whole period to 2016, there will be an additional £41m expenditure available for supermarket retailing, with a further £17 million available for local convenience stores.

*Step 4: Capacity for New Convenience Goods Floorspace*

- 3.16 The floorspace capacity calculations for supermarket retailing in the base and projection years are set out in Table 3.5 below.
- 3.17 In the previous study we used a range of sales densities, from £8,500 per sqm to £11,000 per sqm. However, based on new evidence of supermarket sales densities, we have used revised estimates of the sales density of new floorspace. We consider that in 2006 a small supermarket or discount store could achieve a sales density of around £5,000 per sqm and a larger supermarket could achieve a sales density of around £10,000 per sqm. Convenience goods sales densities are expected to rise at a rate of approximately 0.75% per annum.

<sup>13</sup> ONS, Family Spending. A report on the 2001-2002 Expenditure and Food Survey (2003)

**Table 3.5 Supermarket Convenience Goods Floorspace Capacity**

Year	2002 to 2006	2006 to 2011	2011 to 2016
Residual Expenditure (£m)	11.1	13.4	16.2
Sales Density - small supermarket (£/sqm)	5,000	5,190	5,388
Sales Density - large supermarket (£/sqm)	10,000	10,381	10,776
Floorspace Capacity - small supermarket / discounter (sqm net)	2,221	2,574	3,014
Floorspace Capacity - mainstream supermarket operator (sqm net)	1,111	1,287	1,507

- 3.18 On this basis there will be expenditure potential to support between 3,900 sqm and 7,800 sqm net additional convenience goods floorspace in the Borough's centres from 2002 to 2016. This is dependent on the operator, with the lower figure equating to the mainstream supermarket operators.

### Conclusions on Convenience Goods Floorspace Capacity

- 3.19 This study identifies a higher level of convenience floorspace provision than the previous study, as illustrated in Table 3.6. This is due to higher estimates of per capita expenditure used in the current study.

**Table 3.6 Floorspace Growth Potential - Comparisons with the Original Study**

	2003 Study	2006 Study
2002 to 2006	657 to 850	1,111 to 2,221
2006 to 2011	650 to 841	1,287 to 2,574
2011 to 2016	-	1,507 to 3,014

- 3.20 The scale of the future capacity for convenience floorspace growth within the Study Area over the period to 2016 is fairly limited. Some growth may be absorbed by increases in the sales density of existing floorspace, resulting in a lower level of floorspace requirement, although we have not specifically sought to quantify the extent of this.
- 3.21 We consider that given the relatively limited amount of additional floorspace capacity, there is no need for any major site specific allocations of convenience floorspace. Proposals for extensions to existing town centre stores or new development in town centres should reflect advice in PPS6 and are acceptable in practice.

## 4 RETAIL REQUIREMENTS

- 4.1 The FOCUS<sup>14</sup> Retailer Requirements for Kingston are set out in Appendix 5 and summarized in Table 4.1 below.

**Table 4.1 Retailer Requirements in Kingston**

<i>Use Class</i>	<i>Number</i>	<i>%</i>
A1 Comparison	81	66%
A1 Convenience	7	6%
A2 Financial & Professional	3	2%
A3 Restaurants & Cafés	25	20%
A4 Drinking Establishments	2	2%
A5 Hot Food Takeaway	5	4%
Total	123	100%

- 4.2 There are currently 123 retail operators seeking representation within Kingston. This is a higher requirement than in both Croydon, where 88 retailers are seeking representation, and Guildford, where 111 retailers are seeking representation. In the previous study a total of 70 retailers were seeking representation in Kingston<sup>15</sup>, compared to 55 for Croydon and 95 for Guildford.
- 4.3 The Management Horizons Shopping Index for 2003-04 classes all three centres as Major Regional Centres, but Kingston (16) is ranked higher than Guildford (20) and Croydon (30). The healthy requirement for space in Kingston reflects the view held by retailers that Kingston is a very good trading location.
- 4.4 The majority of retailers seeking space in Kingston are A1 comparison retailers, representing the broad spectrum of these types of goods - shoes and clothing, household goods, jewellers, gift shops and electrical goods.
- 4.5 In addition to the comparison retailers, there are a number of convenience and food and drink operators also seeking space in Kingston.
- 4.6 The increase in the number of retailers seeking representation in Kingston town centre - 123 in 2006 compared to 70 in 2003, albeit based on a different source, is indicative of rising demand, which is reflected in growth in rental values with prime rents in 2005 achieving £3,175 per sqm compared to £2,700 per sqm in 2003 (source CEL). There is therefore clear evidence of considerable competition between traders for representation in Kingston town centre, which is driving up rentals. The longer term impact of this upward movement in rentals will be polarisation of the retail offer to representation by high value commodity traders able to compete for the currently limited space available.

<sup>14</sup> FOCUS is a source of commercial property information which provides data on acquisitions and disposals, retailer requirements and property availability and town profiles.

<sup>15</sup> It should be noted that in the previous study, retailer requirements were sourced from Estates Gazette Interactive.



## 5 CONCLUSIONS

- 5.1 This study has updated the previous retail capacity study for Kingston undertaken in 2003. We have used new population and expenditure data and have altered several assumptions in the light of new information. We have also taken the study forward to 2016. Comparisons with the previous study are only available to 2011.
- 5.2 Our assessment of comparison goods floorspace capacity reveals that there is sufficient expenditure potential to support a total of 82,398 sqm net (117,710 sqm gross) of additional comparison goods floorspace between 2002 and 2016, an increase of 50% on the current 164,739 sqm net (241,378 sqm gross). Table 5.1 below shows the net sales and gross floorspace requirements over three projection periods.

**Table 5.1 Comparison Goods Floorspace Growth Potential Summary**

Floorspace growth potential (sqm)		2003 Study <sup>16</sup>	2006 Study	Differential
2006	Net	20,166	22,162	1,996
	Gross	28,809	31,661	2,852
2011	Net	27,962	16,645	-11,317
	Gross	39,946	23,778	-16,168
2016	Net	-	43,591	-
	Gross	-	62,273	-

- 5.3 Comparisons with the previous study reveal that the comparison goods floorspace growth potential of 38,800 sqm net from 2002 to 2011 is over 9,000 sqm net lower than the previous estimate of 48,100 sqm net over the same period.
- 5.4 The higher comparison goods floorspace growth potential to 2006 results from changes to the base comparison goods expenditure and observed short term growth levels. These changes are partially due to improvements in the quality of the per capita expenditure estimates reflecting inputs from the 2001 Census and a move to regional rather than national data. This provides a higher base year expenditure position than in the previous study and this difference is then exacerbated by the higher expenditure growth rates used in the current study. This is tempered by more robust evidence on sales density growth.
- 5.5 We have undertaken a sensitivity test to reflect the implications of a possible downturn in consumer spending either as a result of higher interest rates or a downturn in the economy (or both). This is solely for comparison goods. Changes in convenience goods spending are not as volatile as with comparison goods. The comparison goods floorspace potential by 2016 under this sensitivity test scenario amounts to 62,000 sqm net between 2002 to 2016, which is around 20,000 sqm net lower than using the standard expenditure growth rates. Thus in round figures, between 2002-2016, there is a projected requirement of between 62,000 (88,500 sqm gross) and 82,000 sqm of net (117,710 sqm gross) additional comparison goods floorspace in Kingston. Within this range the outcome is likely to be determined by national economic effects over the next few years.
- 5.6 A greater level of convenience goods floorspace has also been identified in this study than the previous study. From 2002 to 2006 we have identified convenience floorspace capacity of 1,111sqm to 2,221 sqm depending on the retail format. An additional 1,287 sqm to 2,574 sqm is available to 2011 and a further 1,507sqm to 3,014 sqm by 2016. This higher level of identified need than the previous study results from increased expenditure growth combined with new information on convenience goods retail formats and their sales densities.

<sup>16</sup> Based on Scenario a) constant market shares.



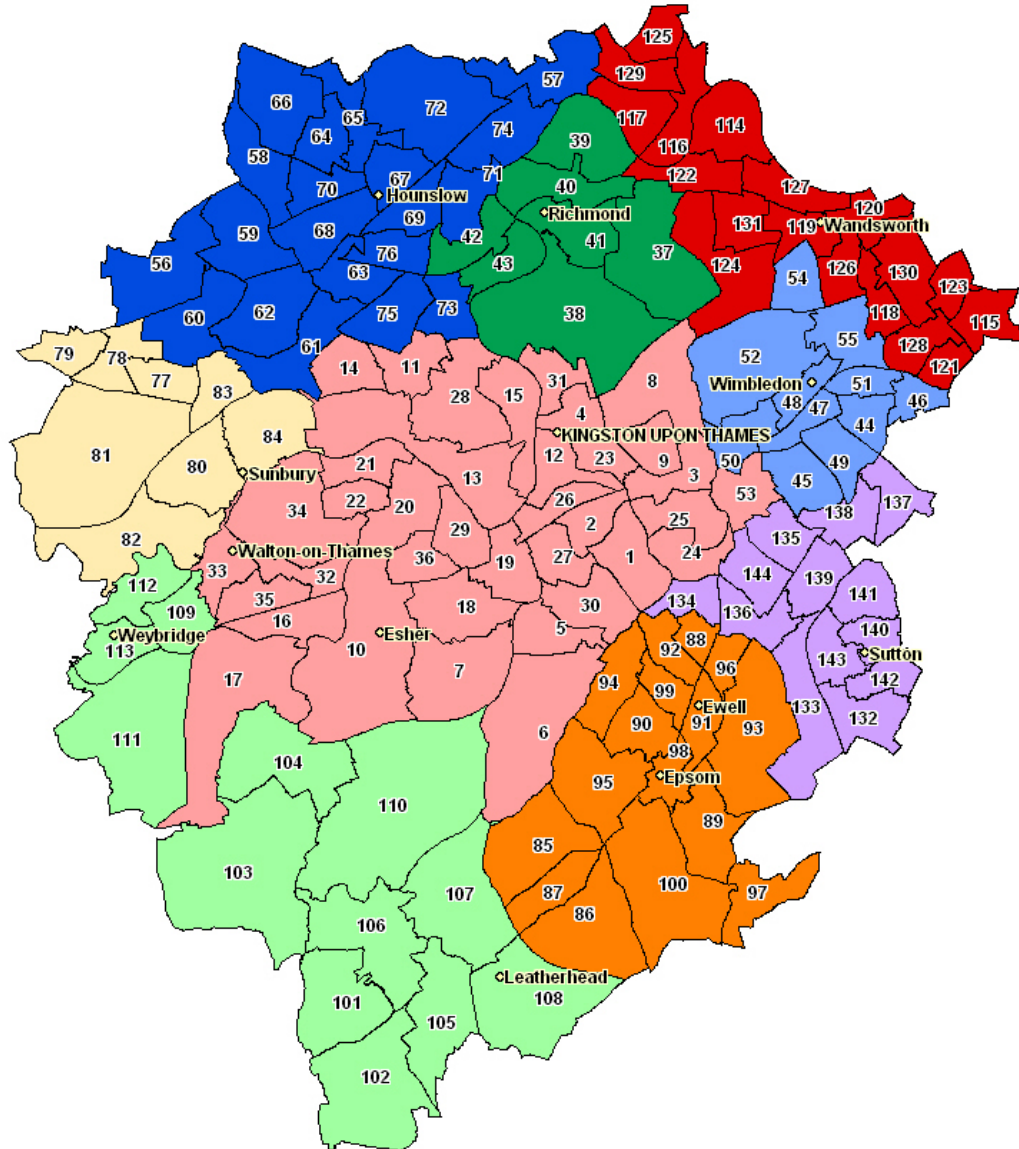
## APPENDIX 1

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### Comparison Goods Study Area - Map & Schedule of Wards



## Comparison Goods Study Area



**Comparison Goods Study Area**

- Zone 1 Kingston
- Zone 2 Richmond
- Zone 3 Wimbledon
- Zone 4 Hounslow
- Zone 5 West
- Zone 6 Epsom
- Zone 7 South West
- Zone 8 North East
- Zone 9 Sutton

## Schedule of Wards within the Zones

Zone Number	Zone Name	Ward	Number
Zone 1	Kingston	Alexandra	1
		Berrylands	2
		Beverley	3
		Canbury	4
		Chessington North and Hook	5
		Chessington South	6
		Claygate	7
		Coombe Hill	8
		Coombe Vale	9
		Esher	10
		Fulwell and Hampton Hill	11
		Grove	12
		Hampton	13
		Hampton North	14
		Hampton Wick	15
		Hersham North	16
		Hersham South	17
		Hinchley Wood	18
		Long Ditton	19
		Molesey East	20
		Molesey North	21
		Molesey South	22
		Norbiton	23
		Old Malden	24
		St James	25
		St Mark's	26
		Surbiton Hill	27
		Teddington	28
		Thames Ditton	29
		Tolworth and Hook Rise	30
		Tudor	31
		Walton Ambleside	32
		Walton Central	33
		Walton North	34
		Walton South	35
		Weston Green	36
Zone 2	Richmond	East Sheen	37
		Ham, Petersham and Richmond Riverside	38
		Kew	39
		North Richmond	40
		South Richmond	41
		St Margarets and North Twickenham	42
		Twickenham Riverside	43
Zone 3	Wimbledon	Abbey	44
		Cannon Hill	45
		Colliers Wood	46

<b>Zone Number</b>	<b>Zone Name</b>	<b>Ward</b>	<b>Number</b>
		Dundonald	47
		Hillside	48
		Merton Park	49
		Raynes Park	50
		Trinity	51
		Village	52
		West Barnes	53
		West Hill	54
		Wimbledon Park	55
Zone 4	Hounslow	Bedfont	56
		Brentford	57
		Cranford	58
		Feltham North	59
		Feltham West	60
		Hanworth	61
		Hanworth Park	62
		Heathfield	63
		Heston Central	64
		Heston East	65
		Heston West	66
		Hounslow Central	67
		Hounslow Heath	68
		Hounslow South	69
		Hounslow West	70
		Isleworth	71
		Osterley and Spring Grove	72
		South Twickenham	73
		Syon	74
		West Twickenham	75
		Whitton	76
Zone 5	West	Ashford Common	77
		Ashford East	78
		Ashford Town	79
		Halliford and Sunbury West	80
		Laleham and Shepperton Green	81
		Shepperton Town	82
		Sunbury Common	83
		Sunbury East	84
Zone 6	Epsom	Ashted Common	85
		Ashted Park	86
		Ashted Village	87
		Auriol	88
		College	89
		Court	90
		Ewell	91
		Ewell Court	92
		Nonsuch	93
		Ruxley	94
		Stamford	95

<b>Zone Number</b>	<b>Zone Name</b>	<b>Ward</b>	<b>Number</b>
		Stoneleigh	96
		Tattenhams	97
		Town	98
		West Ewell	99
		Woodcote	100
Zone 7	South West	Bookham North	101
		Bookham South	102
		Cobham and Downside	103
		Cobham Fairmile	104
		Fetcham East	105
		Fetcham West	106
		Leatherhead North	107
		Leatherhead South	108
		Oatlands Park	109
		Oxshott and Stoke D'Abernon	110
		St George's Hill	111
		Weybridge North	112
		Weybridge South	113
Zone 8	North East	Barnes	114
		Bedford	115
		Chiswick Homefields	116
		Chiswick Riverside	117
		Earlsfield	118
		East Putney	119
		Fairfield	120
		Graveney	121
		Mortlake and Barnes Common	122
		Nightingale	123
		Roehampton	124
		Southfield	125
		Southfields	126
		Thamesfield	127
		Tooting	128
		Turnham Green	129
		Wandsworth Common	130
		West Putney	131
Zone 9	Sutton	Belmont	132
		Cheam	133
		Cuddington	134
		Lower Morden	135
		Nonsuch	136
		Ravensbury	137
		St Helier	138
		Stonecot	139
		Sutton Central	140
		Sutton North	141
		Sutton South	142
		Sutton West	143
		Worcester Park	144

## APPENDIX 2

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### Retail Capacity Calculation Tables - Comparison Goods



**Table 1: Comparison Goods - Base Year Position (2002)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All Zones Total
Population <sup>[1]</sup>	283,529	69,323	119,553	221,880	54,451	82,337	65,479	229,686	121,964	1,248,203
Per capita expenditure (£) <sup>[2]</sup>	3,489	4,240	3,961	2,895	2,940	3,136	3,627	4,029	2,991	
Total Comparison Goods Expenditure (£m) <sup>[3]</sup>	989.2	293.9	473.6	642.4	160.1	258.2	237.5	925.4	364.8	4,345.1
Comparison Goods Expenditure Available for Town Centre Retailing (£m) <sup>[4]</sup>	791.3	235.2	378.8	513.9	128.0	206.6	190.0	740.3	291.9	3,476.1
Market Share for Kingston Town Centre (%) <sup>[5]</sup>	70.0%	36.1%	29.7%	33.1%	34.9%	31.2%	29.9%	18.2%	19.5%	
Turnover Derived from Study Area (£m) <sup>[6]</sup>	553.9	84.9	112.5	170.1	44.7	64.5	56.8	134.7	56.9	1,279.1
Inflow from outside Study Area (%) <sup>[7]</sup>										10%
Total Turnover (£m) <sup>[8]</sup>										1,421.2
Sales Area (sqm net) <sup>[9]</sup>										164,739
Current Sales Density (£/sqm) <sup>[10]</sup>										8,626.8

**NOTES:**

- [1] Population is taken from the GLA 2005 Interim Ward Projections for 2002 (London) and the 2001 Census population (Surrey) which has been projected forward to 2002 using population growth rates by borough provided by Surrey County Council.
- [2] Source: All data derived from MapInfo 2003 per capita annual comparison goods expenditure estimates in 2003 prices. The 2003 estimates are converted to 2000 prices and projected backward to base year using MapInfo actual observed growth rate of 8.7% from 2002 to 2003 (MapInfo Information Brief 05/2). A deduction is made for expenditure via special forms of trading (SFT) such as mail order and internet shopping. For 2002 a deduction of 6% is made.
- [3] The total expenditure is the product of the population and per capita comparison goods expenditure. The figures are in millions of pounds (£m).
- [4] The available expenditure for town centre retail incorporates a deduction of 20% to represent the amount of expenditure currently spent in out-of-centre retail warehousing.
- [5] The comparison goods market share for Kingston town centre are derived from the RBK Retail Study Household Survey.
- [6] The turnover figures are the product of rows 4 and 5.
- [7] RTP estimate of proportion of turnover derived from outside the Study Area.
- [8] The total turnover for Kingston town centre.
- [9] Source: RBK 2001 Shop Survey data, and applying a 70:30 ratio for net:gross.
- [10] The product of total turnover divided by the sales area.
- All monetary values are held constant at 2000 prices.

**Table 2: Population Forecasts in the Projection Years**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All Zones Total
<b>Population 2002</b>	283,529	69,323	119,553	221,880	54,451	82,337	65,479	229,686	121,964	1,248,203
<b>Population 2006</b>	290,192	69,219	119,734	228,341	54,028	84,093	67,324	233,221	123,119	1,269,273
<b>Population 2011</b>	298,219	70,687	121,287	231,730	54,210	86,750	69,533	236,225	125,295	1,293,936
<b>Population 2016</b>	305,650	70,977	121,463	234,733	54,635	89,594	71,824	237,355	126,231	1,312,461
<b>Change in Population 2002 to 2006</b>										
Numeric change	6,664	-104	181	6,461	-423	1,756	1,845	3,535	1,155	21,070
Percentage change	2.4%	-0.2%	0.2%	2.9%	-0.8%	2.1%	2.8%	1.5%	0.9%	1.7%
<b>Change in Population 2006 to 2011</b>										
Numeric change	8,027	1,467	1,553	3,389	182	2,657	2,209	3,004	2,175	24,663
Percentage change	2.8%	2.1%	1.3%	1.5%	0.3%	3.2%	3.3%	1.3%	1.8%	1.9%
<b>Change in Population 2011 to 2016</b>										
Numeric change	7,431	290	176	3,002	425	2,844	2,291	1,130	937	18,525
Percentage change	2.5%	0.4%	0.1%	1.3%	0.8%	3.3%	3.3%	0.5%	0.7%	1.4%
<b>Change in Population 2002 to 2016</b>										
Numeric change	22,121	1,654	1,909	12,852	184	7,257	6,345	7,669	4,267	64,258
Percentage change	7.8%	2.4%	1.6%	5.8%	0.3%	8.8%	9.7%	3.3%	3.5%	5.1%

**NOTES:**

Population is taken from the GLA 2005 Interim Ward Projections for 2002, 2006, 2011 and 2016 (London) and the 2001 Census population (Surrey) which has been projected forward to 2002, 2006, 2011 and 2016 using population growth rates by borough provided by Surrey County Council.

**Table 3: Comparison Goods Expenditure in the Projection Years (per capita)**

	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Zone 9</b>
	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)
2002	3,489	4,240	3,961	2,895	2,940	3,136	3,627	4,029	2,991
2006	4,427	5,381	5,027	3,674	3,730	3,980	4,602	5,113	3,796
2011	5,396	6,559	6,127	4,478	4,547	4,851	5,609	6,232	4,627
2016	6,691	8,133	7,597	5,553	5,638	6,015	6,956	7,727	5,737

**NOTES:**

All data derived from MapInfo 2003 per capita annual comparison goods expenditure estimates in 2003 prices. The 2003 estimates are converted to 2000 prices and projected forwards using growth rates of 9.3% from 2003-04, 3.8% from 2004-06, 4.1% from 2004-11 and 4.3% from 2004-16 (MapInfo Information Brief 05/2).

A deduction is made for expenditure via special forms of trading (SFT) such as mail order and internet shopping. In 2002 a deduction of 7.6% is made, rising to 8.4% in 2006, 9.2% in 2011 and 10.0% in 2016.

**Table 4: Total Comparison Goods Expenditure and Expenditure Growth in the Projection Years**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All Zones Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2002	989.2	293.9	473.6	642.4	160.1	258.2	237.5	925.4	364.8	4,345.1
2006	1,284.8	372.5	601.9	838.9	201.5	334.7	309.8	1,192.5	467.3	5,603.9
2002	1,609.3	463.6	743.1	1,037.7	246.5	420.8	390.0	1,472.1	579.7	6,962.9
2002	2,045.2	577.2	922.8	1,303.4	308.0	538.9	499.6	1,834.2	724.2	8,753.4
Growth in Expenditure 2002 to 2006 (£m)	295.6	78.5	128.3	196.5	41.5	76.5	72.4	267.0	102.5	1,258.9
Growth in Expenditure 2006 to 2011 (£m)	324.5	91.1	141.2	198.8	44.9	86.1	80.2	279.7	112.3	1,358.9
Growth in Expenditure 2011 to 2016 (£m)	435.9	113.6	179.7	265.7	61.5	118.1	109.5	362.0	144.5	1,790.5
Growth in Expenditure 2002 to 2016 (£m)	1,056.0	283.3	449.2	661.0	148.0	280.7	262.1	908.7	359.4	4,408.3

**NOTES:**

The figures in the above table are the products of the data presented in Tables 2 (population) and 3 (per capita comparison goods expenditure) and are in millions of pounds (£m).

All monetary values are held constant at 2000 prices.

**Table 5: Comparison Goods Expenditure Growth Available for Town Centre and Non-Town Centre Locations**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All Zones Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
<b>Town Centre</b>										
2002 to 2006	266.1	70.7	115.5	176.9	37.3	68.8	65.1	240.3	92.3	1,133.0
2006 to 2011	292.0	82.0	127.1	178.9	40.4	77.5	72.2	251.7	101.1	1,223.1
2011 to 2016	392.3	102.3	161.7	239.1	55.4	106.3	98.6	325.8	130.0	1,611.5
2002 to 2016	950.4	254.9	404.3	594.9	133.2	252.6	235.9	817.9	323.4	3,967.5
<b>Non Town Centre</b>										
2002 to 2006	29.6	7.9	12.8	19.7	4.1	7.6	7.2	26.7	10.3	125.9
2006 to 2011	32.4	9.1	14.1	19.9	4.5	8.6	8.0	28.0	11.2	135.9
2011 to 2016	43.6	11.4	18.0	26.6	6.2	11.8	11.0	36.2	14.4	179.1
2002 to 2016	105.6	28.3	44.9	66.1	14.8	28.1	26.2	90.9	35.9	440.8

**NOTES:**

The figures in the above table are derived from the growth figures in Table 4. 90% of the total amount of comparison goods expenditure is forecast to be available for town centre retailing and 10% for retailing that cannot be accommodated within town centres.  
All monetary values are held constant at 2000 prices.

**Table 6: Kingston Town Centre Comparison Goods Floorspace Growth Potential - 2006**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All Zones Total
<b>Total Growth in Expenditure 2002-2006 (£m) <sup>[1]</sup></b>	266.1	70.7	115.5	176.9	37.3	68.8	65.1	240.3	92.3	1,133.0
<b>Market Share</b>	70.0%	30.0%	20.0%	20.0%	25.0%	25.0%	20.0%	10.0%	10.0%	
<b>Available Expenditure (£m)</b>	186.2	21.2	23.1	35.4	9.3	17.2	13.0	24.0	9.2	338.7
<b>Inflow from outside the Study Area (£m) <sup>[2]</sup></b>										16.9
<b>Total Available Expenditure (£m)</b>										355.7
<b>Deduction for Improved Efficiency of Existing Floorspace (£m) <sup>[3]</sup></b>										178.4
<b>Residual Expenditure (£m) <sup>[4]</sup></b>										177.3
<b>Assumed Sales Density (£/sqm) <sup>[5]</sup></b>										8,000
<b>Floorspace Growth Potential (sqm net) <sup>[6]</sup></b>										22,162

**NOTES:**

[1] The total growth in expenditure is derived from Table 5.

[2] RTP estimate of 5% of turnover derived from outside the Study Area.

[3] We build-in a floorspace efficiency of 3.0% per annum throughout the whole period in line with GLA, 'London Town Centre Assessment - Stage 1 Comparison Goods Floorspace Need', 2004.

[4] The residual expenditure is that which is available for new floorspace.

[5] RTP estimate of sales density of new floorspace.

[6] The residual expenditure divided by the sales density.

All figures in the table are in millions of pounds (£m). All monetary values are held constant at 2000 prices.

**Table 7: Kingston Town Centre Comparison Goods Floorspace Growth Potential - 2011**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All Zones Total
<b>Total Growth in Expenditure 2006-2011 (£m) <sup>[1]</sup></b>	292.0	82.0	127.1	178.9	40.4	77.5	72.2	251.7	101.1	1,223.1
<b>Market Share</b>	70.0%	30.0%	20.0%	20.0%	25.0%	25.0%	20.0%	10.0%	10.0%	
<b>Available Expenditure (£m)</b>	204.4	24.6	25.4	35.8	10.1	19.4	14.4	25.2	10.1	369.5
<b>Inflow from outside the Study Area (£m) <sup>[2]</sup></b>										18.5
<b>Total Available Expenditure (£m)</b>										387.9
<b>Deduction for Improved Efficiency of Existing Floorspace (£m) <sup>[3]</sup></b>										254.8
<b>Residual Expenditure (£m) <sup>[4]</sup></b>										133.2
<b>Assumed Sales Density (£/sqm) <sup>[5]</sup></b>										8,000
<b>Floorspace Growth Potential (sqm net) <sup>[6]</sup></b>										16,645

**NOTES:**

[1] The total growth in expenditure is derived from Table 5.

[2] RTP estimate of 5% of turnover derived from outside the Study Area.

[3] We build-in a floorspace efficiency of 3.0% per annum throughout the whole period in line with GLA, 'London Town Centre Assessment - Stage 1 Comparison Goods Floorspace Need', 2004.

[4] The residual expenditure is that which is available for new floorspace.

[5] RTP estimate of sales density of new floorspace.

[6] The residual expenditure divided by the sales density.

All figures in the table are in millions of pounds (£m). All monetary values are held constant at 2000 prices.

**Table 8: Kingston Town Centre Comparison Goods Floorspace Growth Potential - 2016**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All Zones Total
<b>Total Growth in Expenditure 2006-2011 (£m) <sup>[1]</sup></b>	392.3	102.3	161.7	239.1	55.4	106.3	98.6	325.8	130.0	1,611.5
<b>Market Share</b>	70.0%	36.1%	29.7%	33.1%	34.9%	31.2%	29.9%	18.2%	19.5%	
<b>Available Expenditure (£m)</b>	274.6	36.9	48.0	79.1	19.3	33.2	29.5	59.3	25.4	605.3
<b>Inflow from outside the Study Area (£m) <sup>[2]</sup></b>										60.5
<b>Total Available Expenditure (£m)</b>										665.9
<b>Deduction for Improved Efficiency of Existing Floorspace (£m) <sup>[3]</sup></b>										295.3
<b>Residual Expenditure (£m) <sup>[4]</sup></b>										370.5
<b>Assumed Sales Density (£/sqm) <sup>[5]</sup></b>										8,500
<b>Floorspace Growth Potential (sqm net) <sup>[6]</sup></b>										43,591

**NOTES:**

[1] The total growth in expenditure is derived from Table 5.

[2] RTP estimate of 10% of turnover derived from outside the Study Area.

[3] We build-in a floorspace efficiency of 3.0% per annum throughout the whole period in line with GLA, 'London Town Centre Assessment - Stage 1 Comparison Goods Floorspace Need', 2004.

[4] The residual expenditure is that which is available for new floorspace.

[5] RTP estimate of sales density of new floorspace.

[6] The residual expenditure divided by the sales density.

All figures in the table are in millions of pounds (£m). All monetary values are held constant at 2000 prices.

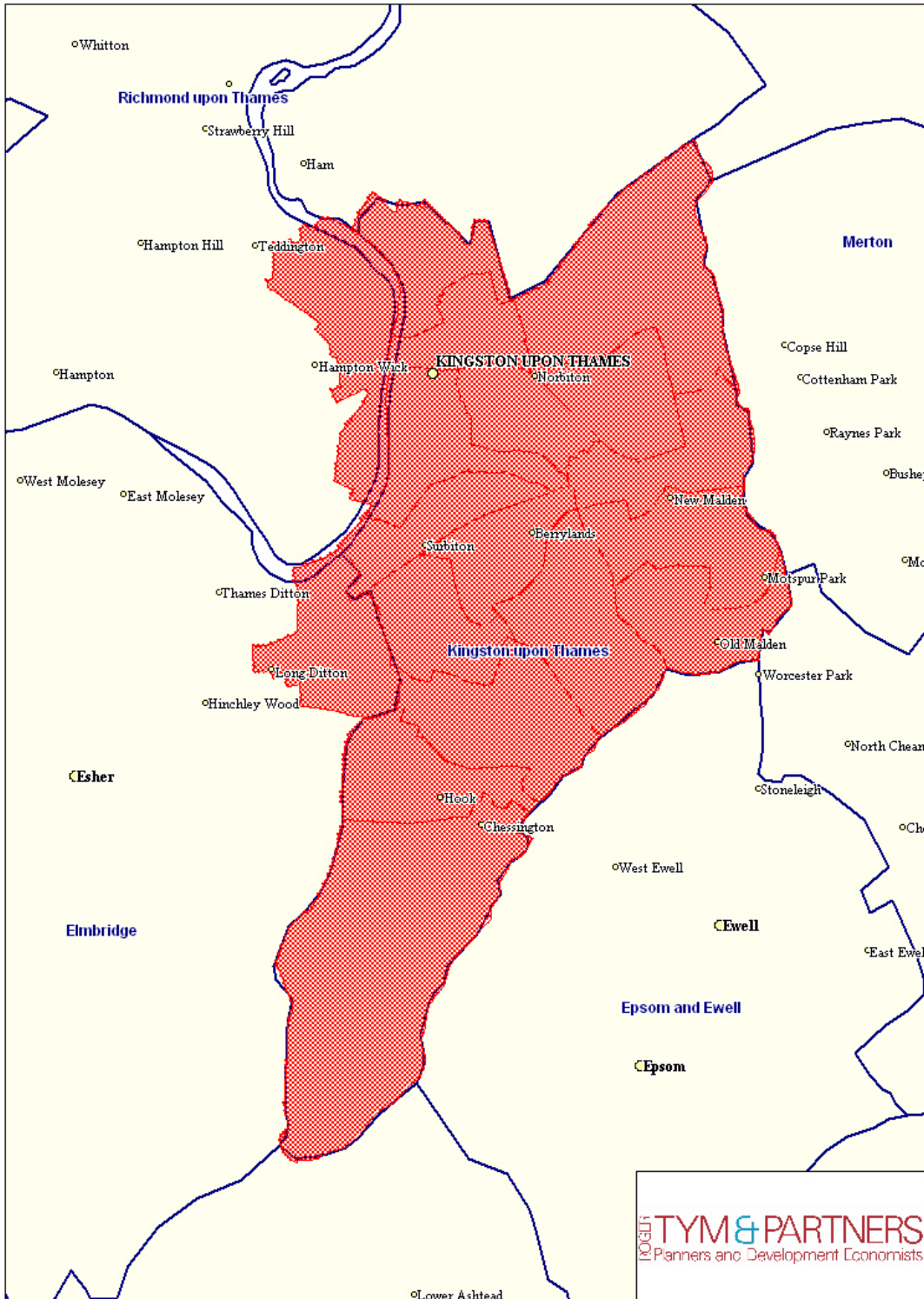
## APPENDIX 4

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### Convenience Goods Study Area Map



# Convenience Goods Study Area





## APPENDIX 5

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### Retail Capacity Calculation Tables - Convenience Goods



**Table 9: Total Population and Population Growth in the Convenience Goods Study Area**

<b>Year</b>	<b>2002</b>	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>Change</b>
Total Population <sup>[1]</sup>	165,039	168,035	172,017	175,515	
<b>Change in Population 2002 to 2006</b>					
Numeric change					2,996
Percentage change					1.8%
<b>Change in Population 2006 to 2011</b>					
Numeric change					3,982
Percentage change					2.4%
<b>Change in Population 2011 to 2016</b>					
Numeric change					3,499
Percentage change					2.0%
<b>Change in Population 2002 to 2016</b>					
Numeric change					10,476
Percentage change					6.3%

NOTES: Population is taken from the GLA 2005 Interim Ward Projections for 2002, 2006, 2011 and 2016 (London) and the 2001 Census population (Surrey) which has been projected forward to 2002, 2006, 2011 and 2016 using population growth rates by borough provided by Surrey County Council.

**Table 10: Convenience Goods Expenditure and Expenditure Growth**

<b>Year</b>	<b>2002</b>	<b>2006</b>	<b>2011</b>	<b>2016</b>	<b>Change</b>
Expenditure (per capita) (£) <sup>[1]</sup>	1,690	1755	1826	1923	
Expenditure net of SFT (per capita) (£) <sup>[2]</sup>	1,675	1739	1810	1906	
Total Study Area Expenditure (£m) <sup>[3]</sup>	276.4	292.3	311.4	334.6	
Growth in Expenditure 2002 - 2006 (£m)					15.9
Growth in Expenditure 2006 - 2011 (£m)					19.1
Growth in Expenditure 2011 - 2016 (£m)					23.2
Growth in Expenditure 2002 - 2016 (£m)					58.1

**NOTES:**

(1) All data derived from MapInfo 2003 per capita annual comparison goods expenditure estimates in 2003 prices. The 2003 estimates are converted to 2000 prices and projected forwards using growth rates of 0.8% from 2004-11 and 0.9% from 2004-16 (MapInfo Information Brief 05/2).

(2) Deduction made to account for forecast expenditure on special forms of trading (SFT) at 0.9%.

(3) Total Study Area Expenditure is the product of the per capita figure (net of SFT) and the total population figures from row one of Table 10.

All monetary values are held constant at 2000 prices.

**Table 11: Convenience Goods Expenditure Available for Local Convenience Stores and Supermarkets**

<b>Year</b>	<b>2002 to 2006</b>	<b>2006 to 2011</b>	<b>2011 to 2016</b>
Local Convenience Store Expenditure (£m) <sup>[1]</sup>	4.8	5.7	7.0
Supermarket Expenditure (£m) <sup>[2]</sup>	11.1	13.4	16.2

**NOTES:**

(1) The amount of expenditure growth that is available for non-supermarket retailing, based on 30% of the total convenience expenditure.

(2) The amount of expenditure growth that is available for supermarkets, based on 70% of the total convenience expenditure.

All monetary values are held constant at 2000 prices.

**Table 12: Supermarket Convenience Goods Floorspace Capacity**

<b>Year</b>	<b>2002 to 2006</b>	<b>2006 to 2011</b>	<b>2011 to 2016</b>
Residual Expenditure (£m) <sup>[1]</sup>	11.1	13.4	16.2
Sales Density - small supermarket (£/sqm) <sup>[2]</sup>	5,000	5,190	5,388
Sales Density - large supermarket (£/sqm) <sup>[3]</sup>	10,000	10,381	10,776
Floorspace Capacity - small supermarket / discounter (sqm net)	2,220	2,574	3,014
Floorspace Capacity - large supermarket (sqm net)	1,110	1,287	1,507

**NOTES:**

(1) Expenditure available for supermarkets from Table 11.

(2) Source : RTP estimate of sales density for new small supermarket / discounter floorspace.

(3) Source : RTP estimate of sales density for new larger supermarket.

All monetary values are held constant at 2000 prices.

## APPENDIX 5

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### Retailer Requirements



## Retailer Requirements for Kingston upon Thames

Company Name	Type	Use Class	Min (sq.ft)	Max (Sq.ft)
4 FEET	SHOE SHOPS	A1	600	1,500
AGAIN	CHARITY SHOPS	A1	2,250	2,750
AND SO TO BED LTD	FURNITURE	A1	4,000	4,000
APPLE COMPUTER UK LTD	COMPUTERS & SOFTWARE	A1	4,000	4,000
ART	PICTURE FRAMING	A1	600	1,200
BASE MENSWEAR	MEN'S WEAR	A1	2,500	3,000
BEAVERBROOKS THE JEWELLERS LTD	JEWELLERS/WATCH SELLERS	A1	1,000	1,300
BETWEEN THE LINES LTD	NEWSAGENT/CARDS/STATIONER	A1	900	1,400
BLUE INC	CLOTHING	A1	1,500	3,000
BON MARCHE LTD	WOMEN'S WEAR	A1	2,500	3,000
BOYS BASE	CLOTHING	A1	2,500	3,000
BRITISH HEART FOUNDATION	CHARITY SHOPS	A1	600	1,200
BULLFROG	CLOTHING	A1	1,000	4,500
COTSWOLD OUTDOOR LTD	CLOTHING/CAMPING EQUIPMENT	A1	7,500	15,000
COUNTRY CASUALS LTD	WOMEN'S WEAR	A1	800	1,400
DAVID & GOLIATH RETAIL LTD	CLOTHING	A1	1,000	1,000
DEBENHAMS RETAIL PLC	DEPARTMENT STORES	A1	12,000	20,000
DR CHINA	DENTAL/MEDICAL	A1	350	1,400
FEET INC	SHOE SHOPS	A1	1,000	1,500
FIRETRAP	CLOTHING	A1	1,800	2,200
FOPP RECORDS LTD	RECORDS/TAPES/CDS/VIDEOS	A1	3,000	5,000
FRANCHETTI BOND LTD	SHOE SHOPS	A1	800	1,100
GAMESTATION LTD	COMPUTERS & SOFTWARE/GAMES & TOYS	A1	700	1,200
GEORGE	CLOTHING	A1	10,000	20,000
GERRY WEBER LTD	WOMEN'S WEAR	A1	3,230	5,380
GINGER GROUP (THE)	HAIRDRESSERS/BEAUTICIANS	A1	500	1,000
GODIVA	CONFECTIONERS/TOBACCONISTS	A1	350	500
HEADMASTERS	HAIRDRESSERS/BEAUTICIANS	A1	1,000	2,000
HOTEL CHOCOLAT LTD	CONFECTIONERS/TOBACCONISTS	A1	800	1,350
HPJ RETAILING LTD	JEWELLERS/WATCH SELLERS	A1	800	1,200
INDIA JANE OF SLOANE STREET	FURNITURE	A1	2,000	5,000
JAEGER CO LTD	CLOTHING	A1	2,300	3,000
JOHN R FOX JEWELLERS	JEWELLERS/WATCH SELLERS	A1	300	600
JOHNSON CLEANERS UK LTD	DRY CLEANERS	A1	600	1,400
KHAZANA TRADING LTD	LIGHTING/FURNITURE/GIFT SHOPS	A1	1,500	2,000
KRISP CLOTHING CO LTD	WOMEN'S WEAR	A1	1,250	1,500
LAKELAND LTD	HOUSEHOLD ACCESSORIES	A1	5,000	7,000
LASERCARE CLINICS (HARROGATE) LTD	COSMETICS/TOILETRIES	A1	1,500	4,000
LOMBOK	FURNITURE	A1	3,500	4,500
MAPLIN ELECTRONICS LTD	ELECTRICAL/DURABLE GOODS	A1	2,500	5,000
MASSIMO DUTTI UK LTD	CLOTHING	A1	300	500
MENKIND STORES LTD	GIFT SHOPS/FANCY GOODS	A1	1,000	1,800
MEXX LTD	MEN'S WEAR	A1	3,500	8,000
MOSTYNS LTD	HOUSEHOLD ACCESSORIES	A1	700	5,000
NEW ENGLAND LIFESTYLE LTD	FURNITURE/HOUSEHOLD ACCESSORIES	A1	600	1,200
OFFICE HOLDINGS LTD	SHOE SHOPS	A1	1,500	1,500

Company Name	Type	Use Class	Min (sq.ft)	Max (Sq.ft)
OIL & VINEGAR	GIFT SHOPS/FANCY GOODS	A1	800	2,000
OLIVER BONAS	GIFT SHOPS/FANCY GOODS	A1	250	1,500
ORIGINAL STONE CO LTD	FLOORING SERVICES	A1	750	1,200
PAPER MILL SHOP	HOBBIES/ARTISTS MATERIALS	A1	500	900
PERFUME SHOP LTD	PERFUMERY	A1	250	600
PHASE EIGHT (FASHION & DESIGNS) LTD	WOMEN'S WEAR	A1	900	1,500
POUNDLAND	VARIETY/DISCOUNT STORES	A1	2,500	7,000
PRICELESS SHOES LTD	SHOE SHOPS	A1	1,500	2,500
PROFESSIONAL COOKWARE COMPANY (THE)	KITCHENS/HOMEWARE	A1	750	1,500
REGIS	HAIRDRESSERS/BEAUTICIANS	A1	900	1,000
REPUBLIC	CLOTHING	A1	2,000	3,000
RIGHT PRICE LTD	HOUSEHOLD ACCESSORIES	A1	1,500	3,000
ROBERT DYAS LTD	IRONMONGERS/HARDWARE	A1	2,500	3,000
ROHAN DESIGNS LTD	SPORTS & LEISURE WEAR	A1	1,000	1,500
SCOPE	CHARITY SHOPS	A1	750	5,000
SHABBY & CHIC INTERIORS LTD	FURNITURE	A1	1,100	2,500
SHOEFAYRE LTD	SHOE SHOPS	A1	1,200	2,500
SILVERSCREEN LTD	GAMES & TOYS/VIDEO/HI-FI/AUDIOVISUAL	A1	1,900	3,500
SMAERD	FASHION RETAIL	A1	5,000	7,500
SPORTS WORLD INTERNATIONAL LTD	SPORTS SHOPS	A1	15,000	30,000
TILE CLEARING HOUSE LTD	DIY/HARDWARE/GRDN CENTRES	A1	4,500	8,000
TJ HUGHES PLC	DEPARTMENT STORES	A1	25,000	150,000
TK MAXX	VARIETY/DISCOUNT STORES	A1	20,000	30,000
TONI & GUY LTD	HAIRDRESSERS/BEAUTICIANS	A1	800	1,200
TONI & GUY OPTICIANS LTD	OPTICIANS	A1	750	1,000
TOY STOP	GAMES & TOYS	A1	2,500	3,000
TOYS 'R' US LTD	GAMES & TOYS	A1	15,000	33,500
TRAID LTD	CLOTHING	A1	800	1,000
USC GROUP PLC	MEN'S WEAR	A1	4,000	6,000
WAREHOUSE GROUP LTD	WOMEN'S WEAR	A1	1,500	2,500
WARREN JAMES (JEWELLERS) LTD	JEWELLERS/WATCH SELLERS	A1	600	1,000
WHITE WALL GALLERY	ART GALLERY	A1	750	2,000
WORKS PUBLISHERS OUTLET (THE)	BOOKSELLERS	A1	1,500	2,500
ZARA UK LTD	CLOTHING	A1	10,700	16,150
ZOOM THE LOOM LTD	HOUSEHOLD ACCESSORIES	A1	1,200	10,000
ALDI STORES LTD	SUPERMARKETS	A1 Con	14,600	14,600
GOURMET JOES NEW YORK PRETZEL CO	BAKERS	A1 Con	50	250
GREGGS PLC	BAKERS	A1 Con	800	1,200
JULIAN GRAVES LTD	HEALTH FOODS	A1 Con	500	2,000
MAJESTIC WINE	OFF LICENCES/LIQUOR	A1 Con	2,000	5,000
WAREHOUSES LTD	BAKERS	A1 Con	300	750
MORRIS PASTIES LTD	OFF LICENCES/LIQUOR	A1 Con	800	2,500
ODDBINS LTD	BOOKMAKERS	A2	1,000	1,000
BETFRED LTD	INSURANCE BROKERS	A2	500	1,000
ENDSLEIGH INSURANCE SERVICES LTD	TURF ACCOUNTANTS	A2	1,000	1,000
FRED DONE LTD	CAFE/RESTAURANT/BAR	A3	1,000	1,200
752PIZZA	CAFE/RESTAURANT/BAR	A3	1,150	1,150
AS GREEK AS IT GETS	CAFE/RESTAURANT/BAR	A3	2,500	6,000
BELGO	CAFE/RESTAURANT/BAR	A3	2,500	5,500
BIERODROME	CAFE/RESTAURANT/BAR	A3	2,500	5,500

Company Name	Type	Use Class	Min (sq.ft)	Max (Sq.ft)
CAFFE ITALIA (UK) LTD	CAFE/RESTAURANT/BAR	A3	1,500	2,500
CORNISH OGGY OGGY PASTY COMPANY (THE)	CAFE/RESTAURANT/BAR	A3	500	2,000
COSTA LTD	CAFE/RESTAURANT/BAR	A3	750	2,000
CREPEAFFAIRE LTD	CAFE/RESTAURANT/BAR	A3	300	600
FINE BURGER CO	CAFE/RESTAURANT/BAR	A3	1,000	2,000
HENRY J BEAN'S GROUP PLC	CAFE/RESTAURANT/BAR	A3	3,000	5,000
KURIYA	CAFE/RESTAURANT/BAR	A3	1,000	3,500
LA TASCA RESTAURANTS LTD	CAFE/RESTAURANT/BAR	A3	3,000	3,000
LOMO	CAFE/RESTAURANT/BAR	A3	2,000	4,000
NOODLE TIME (CROYDON) LTD	CAFE/RESTAURANT/BAR	A3	1,500	3,500
OI BAGEL PLC	CAFE/RESTAURANT/BAR	A3	250	1,200
OUTBACK STEAKHOUSE (UK) LTD	CAFE/RESTAURANT/BAR	A3	4,000	6,000
PASTY PRESTO LTD	CAFE/RESTAURANT/BAR	A3	300	2,500
PRESTO	CAFE/RESTAURANT/BAR	A3	300	500
REAL BURGER WORLD	CAFE/RESTAURANT/BAR	A3	1,000	2,500
REAL CHINA LTD (THE)	CAFE/RESTAURANT/BAR	A3	750	750
RESTAURANT BAR & GRILL	CAFE/RESTAURANT/BAR	A3	3,000	8,000
ROCKET RESTAURANTS LTD	CAFE/RESTAURANT/BAR	A3	3,750	3,750
SPORTS CAFE INTERNATIONAL	CAFE/RESTAURANT/BAR	A3	10,000	15,000
SPUR RESTAURANTS LTD	CAFE/RESTAURANT/BAR	A3	1,000	1,000
YO SUSHI LTD	CAFE/RESTAURANT/BAR	A3	1,000	2,500
BEST CELLARS	PUBLIC HOUSES	A4	3,000	3,000
YATES GROUP PLC	PUBLIC HOUSES	A4	6,000	7,000
BASILICO	FAST FOOD/TAKEAWAY OUTLETS	A5	800	2,000
BOMBAY BICYCLE CLUB	FAST FOOD/TAKEAWAY OUTLETS	A5	800	1,500
KRISPY KREME DONUTS	FAST FOOD/TAKEAWAY OUTLETS	A5	2,500	4,000
MCDONALD'S RESTAURANTS LTD	FAST FOOD/TAKEAWAY OUTLETS	A5	700	2,000
ROOSTERS CHICKEN LTD	FAST FOOD/TAKEAWAY OUTLETS	A5	500	1,000

Source: Focus Database, March 2006