

Kingston upon Thames

New Malden

Surbiton

Tolworth



# ROYAL BOROUGH OF KINGSTON RETAIL STUDY

January 2003

Roger Tym  
& PARTNERS

Royal Borough of Kingston

## RETAIL STUDY

Final Report

January 2003

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## 1 INTRODUCTION

- 1.1 In March 2002 the Royal Borough of Kingston Council (RBK) commissioned Roger Tym & Partners to undertake a Borough-wide retail study. The aim of the study is to provide up-to-date information on shopping facilities and shopping patterns within the Borough, which will assist the Council with its review of UDP shopping and town centre policies, and also with the development of strategies to improve Kingston town centre and the district centres.

### The Brief

- 1.2 The Council's brief set out the study aims, which were to:
- establish through surveys the existing shopping patterns within Kingston town centre's catchment area,
  - establish through surveys the shopping habits and attitudes of residents, shoppers and retailers in the Borough's centres and at the new Sainsbury store on Richmond Road;
  - review the current retail rental profile in the Borough's centres and changes over time;
  - make a qualitative assessment of the retail floorspace in the Borough;
  - identify trends in retailing; and finally to
  - provide guidance on the future direction of retail strategies in the Borough.
- 1.3 To meet the aims of the brief the study needed to be largely survey based. A total of four separate surveys were prepared and undertaken and this report presents the findings, identifies the key messages and how these translate into planning policy issues, and recommends forward planning options that will help to sustain and enhance all of the Borough's shopping centres.

### Context

- 1.4 Before we commence with the survey reviews we firstly provide a contextual overview of the four main centres in the Borough that the study addresses.

#### *Kingston town centre*

- 1.5 The shopping hierarchy in the Royal Borough is dominated by Kingston town centre, which is one of the largest and most successful shopping centres in Greater London outside the West End. Kingston town centre has three times as much retail floorspace as the three other district centres in the Borough combined and serves as the principal shopping centre for a catchment area that extends across much of south-west London and North-east Surrey.
- 1.6 Kingston town centre currently supports 230,000 sqm gross<sup>1</sup> of retail floorspace in categories (A1 to A3) and is anchored principally by John Lewis and Bentalls department stores and the Bentalls Shopping Centre. However, since the Bentall Centre opened in 1992 there have been no significant additions to the retail floorspace in Kingston town centre, while centres with which Kingston competes have developed and continue to plan significant additions to retail floorspace and public realm improvements.
- 1.7 The recently completed Charter Quay and Rotunda developments have made a significant improvement to Kingston's previously limited range of A3 and leisure outlets through the introduction of good quality restaurants and bars, leisure activity such as the bowling, cinema and the theatre (which is currently under-construction). The Travel Lodge hotel development on Old London Road and other town centre housing, including approximately 700 dwellings in north Kingston, will help to further diversify the core town centre economy.

<sup>1</sup> ODPM 'Producing Boundaries and Statistics for Town Centres', July 2002

- 1.8 The very nature of Kingston town centre's success as a retailing centre contributes to the main problems confronting the town at the present time, which are principally poor accessibility, traffic congestion and a shopping environment that is in parts poor and unwelcoming. The ring road has brought benefits for the shopping streets within the retail core by ensuring that these are predominantly free of traffic (except for those streets served by bus and taxi), but the road has contributed to the severance of the public transport access points from the town centre. The radial roads into Kingston (London Road, Villiers Road, Portsmouth Road, Richmond Road and Kingston Bridge) are severely congested at peak shopping periods. This is partly because of the poor access to some of the key car parks (especially the John Lewis and Bentalls car parks) and the relatively unattractive public transport access. Bus routes, despite bus priority lanes, suffer from general levels of congestion and none of the public transport arrival points link well with the retail core or are welcoming to the visitor. Additionally, the ring road and the other major physical barrier, the river Thames, constrain the area available for town centre activities and restrict opportunities for expansion.

#### *The District Centres*

- 1.9 In comparison to Kingston town centre the district centres of New Malden, Surbiton and Tolworth function as much more localised shopping and leisure destinations.
- 1.10 New Malden is a traditional linear centre that provides 32,000 sqm of gross retail floorspace<sup>1</sup> and has maintained its vitality and viability despite the extensive amount of retail warehouse development nearby in Cambridge Road/Burlington Road. The centre is anchored by Waitrose and Sainsbury foodstores at either end of the High Street with a good range of major multiples such as W H Smith, Boots, Woolworths and Iceland in between. There is also a good range of clothing outlets for a district centre and independent operators and specialist stores selling furniture and beds. New Malden does not have an excessive proportion of charity shops or fast food outlets, although the types of restaurants/cafés trading in New Malden are relatively down market.
- 1.11 New Malden High Street is also a busy arterial route and this detracts from the environment of the centre and restricts convenient pedestrian linkage to both sides of the key retail frontage. The linear centre lacks significant depth. There are few obvious opportunities for development in New Malden.
- 1.12 Surbiton supports 22,000 sqm of gross retail floorspace<sup>1</sup> and has become a strong district centre for convenience shopping. The continued presence of Sainsbury (confirmed once the company lost its appeal on the waterworks site) together with Somerfield has been supplemented by Waitrose on the former B&Q site and, more recently, a small scale food only Marks and Spencer store in Victoria Road.
- 1.13 There is a limited range of clothing outlets in Surbiton, although there has been a recent letting to Motto and a normal amount of independent specialists such as the Bed Post and charity shops. The big change in Surbiton over the past decade has been the marked reduction in the vacancy rate since the influx of a significant number of themed pubs, cafes and restaurants. Brighton Road, traditionally the weaker part of the centre, has been revitalised, and the recent opening of Fish! will assist in assuring that Surbiton does not simply become a down market fast food enclave.
- 1.14 Surbiton also suffers from traffic congestion on Brighton Road and Victoria Road. There is the potential to improve the pedestrian environment and there are one or two small-scale opportunities for redevelopment/refurbishment such as the Post Office site.
- 1.15 Tolworth provides 17,000 sqm of gross retail floorspace<sup>1</sup> and is the least prosperous centre of the four. Its largest store is the food-only Marks and Spencer store on the ground floor of Tolworth Tower. The other main multiples are Budgens, Iceland and Boots. There are a large number of independents and fast food outlets in Tolworth. Vacancy rates are not high, however, and some of the units currently vacant appear to be re-opening slowly. This indicates a reasonable level of operator demand.

- 1.16 Whilst Tolworth appears to be reasonably successful in serving its catchment area major improvement to its profile or performance is unlikely. In large measure this is due to the fact that Broadway is such a major physical barrier to shopper movement between the east and west sides of the district centre, and detracts from the vitality of the centre as a whole. The centre is also poorly linked to the railway station, which is located on the southern side of the A3.

### **Structure of the Report**

- 1.17 The report is structured as follows:
- Section 2 outlines current household shopping patterns within the Study Area;
  - Section 3 provides a review of current habits and attitudes of shopper's frequenting the Borough's shopping centres;
  - Section 4 provides a review of current shopper habits and attitudes at the new Sainsbury store on Richmond Road;
  - Section 5 summarises the views of retailers operating within the Borough's centres and those currently not represented;
  - Section 6 sets out the findings of our property market assessment;
  - Section 7 draws together the key policy issues from the survey work; and
  - Section 8 presents our recommendations for the Borough's review of retail and town centre policies and development of retail planning strategies.
- 1.18 The text of the report is accompanied by a number of Appendices that set out the tabulated responses to the survey work and also maps illustrating the Study Area and the retail property rental profile within each of the centres.

## 2 CURRENT HOUSEHOLD SHOPPING PATTERNS

- 2.1 In order to understand existing shopping patterns within Kingston town centre's catchment area we undertook a telephone based household survey using a structured questionnaire. The area selected for the survey (the Study Area) was based on data from the Hillier Parker National Survey of Local Shopping Patterns. The Study Area (illustrated at **Map 1, Appendix 1**) extends from Weybridge in the west to Sutton in the east and from Leatherhead in the south to beyond Hounslow in the north and is the area from which, according to the Hillier Parker data, Kingston town centre derives a comparison goods shopping penetration rate of greater than 10%.
- 2.2 For purposes of analysis it is necessary to divide the Study Area into zones. On the basis of the final survey results for non-bulky comparison goods (*clothing & footwear*) shopping we have delineated nine zones, according to the penetration rates of the various centres. This zone configuration is as follows:
1. **Kingston**, the inner core of the survey area, composed of 39 wards where the penetration rate of Kingston town centre is greater than 50%.
  2. **Richmond**, nine wards grouped around Richmond.
  3. **Wimbledon**, 12 wards grouped around Wimbledon.
  4. **Hounslow**, 22 wards grouped around Hounslow.
  5. A **West** zone, of 10 wards that look towards Staines and Ashford, both of which are outside the survey area.
  6. **Epsom**, 16 wards grouped around Epsom.
  7. A **Southwest** zone, of 13 wards that look towards Guildford, Walton and other centres in this sector.
  8. A **Northeast** zone, of 18 wards that look towards Central London.
  9. **Sutton**, 18 wards grouped around Sutton.
- 2.3 **Map 2** presented at **Appendix 1** illustrates this zoning plan.
- 2.4 The survey used a systematic random sample drawn directly from the residential telephone subscriber listings to sample 1,500 households resident in the Study Area. The survey was questionnaire based and the fieldwork was carried out between May and June 2002. The methodology, the questionnaire and the full results of the survey are set out in **Appendix 2** to this report.
- 2.5 The survey principally sought to establish current shopping patterns and centre/store market shares in respect of the following:
- clothes and shoes (non-bulky comparison goods);
  - food and groceries (convenience goods – split between supermarket and day-to-day top up);
  - furniture, carpets, and white electrical goods (bulky comparison goods); and
  - DIY goods.
- 2.6 Below, we analyse the market share results for the four main categories of retail goods as specified above (the results are presented in Tables 2.1 – 2.11).
- 2.7 The survey also addressed transportation issues, shopper attitudes and the prevalence of special forms of trading (SFT) as a method of shopping. We consider responses to the mode of transport and transportation issues in Tables 2.12 -2.17, and responses to questions relating to shopper attitudes in Tables 2.18- 2.27, before finally addressing the use of SFT within the Study Area (Tables 2.27- 2.30).

## Market Shares

### *Non-bulky Comparison Goods*

- 2.8 Respondents were asked to identify their main and most frequently used alternative location for non-bulky comparison goods shopping. The results, setting out the data for the principal centres and weighted according to the procedure detailed in the Household Survey Methodology, are presented in **Tables 2.1 and 2.2**. This data is then combined in **Table 2.3** to provide the overall market share for each centre, again using the weighting procedure described in the Methodology.
- 2.9 Over the entire survey area (the 'All Zones' figure) the market share of Kingston town centre is likely to be approximately 37% for non-bulky comparison goods<sup>2</sup>, which is far higher than any of the other centres in the Study Area including Central London (11%), Wimbledon (6%), Hounslow (7%), Sutton (8%) or Richmond (6%), and is all the more significant as the market shares for the latter centres includes the market share accruing to adjacent minor centres (as referenced in the location descriptions for the centres).
- 2.10 In Zone 1, Kingston's central zone, Kingston town centre derives a market share of 70%, with no other centre reaching a market share above 5%. In the other zones, Kingston centre still retains substantial market shares, but its influence is usually equalled or surpassed by another centre: Central London in Zone 8 to the northeast, Guildford in Zone 7 to the southwest, Staines/Ashford in Zone 5 to the west and Epsom, Sutton, Wimbledon, Richmond and Hounslow in the zones grouped around these centres.
- 2.11 With the exception of New Malden district centre, which derives a market share of 2.4% from Zone 1, none of the Kingston district centres derive significant market shares for non-bulky comparison goods.
- 2.12 The weakness of Central London's influence in the Study Area is one of the most interesting findings of the survey. The Study Area lies on the doorstep of Central London, which can lay claim to be one of the world's leading comparison-shopping centres in terms of the scale, range, prices and quality of the goods that it offers. Yet, despite this, Central London takes relatively little trade from the Study Area: only 11% in total and not much more than 30% in Zone 8 the zone in closest proximity and most of which lies in Inner London.
- 2.13 The non-bulky comparison goods market share evidence underlines Kingston's role as the major shopping destination in London's South-west quadrant and North-east Surrey.

### *Convenience Goods – Supermarkets*

- 2.14 Respondents were asked to indicate their main store and the most frequently used alternative store for supermarket shopping. The results for each principal store and each centre are presented in **Tables 2.4 and 2.5** and are one again weighted in accordance with the procedure set out in the Methodology. The combined market share data for supermarket shopping is set out in **Table 2.6**.
- 2.15 Table 2.6 demonstrates that supermarket shopping (and indeed day-to-day top up shopping) patterns are much more localised than non-bulky comparison goods shopping patterns. Shoppers travel much shorter distances for supermarket shopping than for clothes/footwear shopping. Market shares are therefore much more fragmented than for non-bulky comparison goods shopping. In particular, the trade of Zone 1, the central Kingston zone, is much more evenly spread over a number of locations, with Kingston town centre, at 11%, being out performed by several other locations including Surbiton. There are a number of large stores located within Zone 1, but beyond RB Kingston that draw significant market shares from the zone such as the Sainsbury store in Hampton and Tesco on Beverley Way.

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<sup>2</sup> The market share data for each of the zones is based on numbers of households rather than on the total expenditure (total expenditure being the conventional way to calculate market share), because retail capacity calculations are beyond the scope of this study.

Some of the outer zones do have dominant locations such as Zone 5 where the Tesco store at Sunbury has a dominant market share and Zone 6 where the Sainsbury store in Epsom similarly has a dominant market share.

- 2.16 Table 2.6 demonstrates that overall supermarkets in RB Kingston derive a market share of 37% from Zone 1. The main supermarkets in RB Kingston are the Waitrose and Sainsbury stores in Surbiton and Kingston centres. Most of the other stores in the Borough derive market shares of less than 1.5%, with the exception of the Waitrose store in New Malden. We expect that the market share figure for the new (at the time of the survey) Sainsbury store on Richmond Road reflects the 'settling down' period, and will adjust, most likely upwards, in time.

#### *Convenience Goods – Day-to-day top up Shopping*

- 2.17 Respondents were asked to indicate their main store / location for day-to-day top up shopping. The results, grouped by location are presented in **Table 2.7**. The data indicates that Kingston centres retain a market share of 13% across the whole Study Area, and 44% from the 'home' Kingston zone, Zone 1, which we consider to be credible given that Zone 1 covers a wide geographical area. Surbiton and Kingston centres once again dominate this sector, but all other locations 'pitch in' with significant market shares.

#### *Bulky Comparison Goods*

- 2.18 Respondents were asked to indicate their main store and the most frequently used alternative store for bulky comparison goods shopping (furniture, carpets and electrical). The results for the principal centres, weighted in accordance with the procedure set out in the Methodology, are presented in **Tables 2.8 and 2.9**. The combined market share data for bulky comparison goods shopping is set out in **Table 2.10**.

- 2.19 **Table 2.10** demonstrates that market shares for bulky comparison goods exhibit a similar pattern to those for non-bulky comparison goods, except that the larger centres are somewhat less prominent. Kingston town centre, for example, has a Study Area market share of 37% for non-bulky comparison goods, but 30% for bulky comparison goods. The other main centres such as Central London, Epsom and Guildford exhibit similar patterns. The most common store named for this type of shopping is John Lewis/Peter Jones, which took more than a quarter of the total Study Area trade. Retail warehouse operators such as Currys, Comet and Argos are much less significant.

#### *DIY Goods*

- 2.20 Respondents were asked to indicate their main store / location for DIY goods shopping. The results, for the principal centres are presented in **Table 2.11**. The DIY market share pattern is substantially different from that for bulky comparison goods. More than half the respondents said their households did not regularly purchase DIY items, and these have been excluded from the analysis. Of those who did give locations, few used any of the named central areas, such as Kingston, Surbiton, New Malden or Central London. DIY purchases in the Study Area are mainly from retail warehouse operators such as Homebase, which derives a market share of 45%, B&Q (37%) and Wicks (5%) and are prominent in locations such as New Malden (Shannon Corner/Burlington Road) and Croydon (Purley Way). Traditional operators like Travis Perkins received few mentions and hardly any high-street retailers were identified (John Lewis accounted for only 0.1%). It is clear that in the Kingston Study Area DIY shopping has very different geographical characteristics compared with bulky comparison goods.

## **Transport**

- 2.21 Before turning to questions of transport used for shopping, we look at the level of car ownership in the Study Area. **Table 2.12** sets out car availability, rather than car ownership; company cars and other employers' vehicles are included, provided they are available to the household outside working hours. Over the entire Study Area, 80% of households had the use of one or more cars. The proportion is

significantly higher in Zones 5, 6 and 7 and significantly lower in the northeast zone, Zone 8, much of which lies in Inner London.

#### *Mode of Access*

- 2.22 Tables 2.13 to 2.17 give the means of transport normally used for different kinds of shopping trip. In cases where the respondent gave more than one mode - such as walk plus bus - we recorded the most important in terms of distance.
- 2.23 Tables 2.13 and 2.14 assess the mode of transport to the shopping centre used for non-bulky comparison goods shopping. **Table 2.13** demonstrates that the car remains the most popular mode of transport (accounting for 57% of all shopping trips in the Study Area), but that public transport plays an important role in providing the means of access for a third of non-bulky goods shopping trips across the Study Area.
- 2.24 **Table 2.14** is a cross-tabulation that assesses the mode of transport used by shoppers to access the main centres for non-bulky comparison goods shopping. In the case of Kingston town centre two-thirds of the trips are made by car, and a third by public transport/foot/cycle. The ratio in other main centres such as Croydon and Hounslow is different, in these centres many more shopping trips using public transport (59% of households access Croydon town centre by non-car borne means and the percentage for Hounslow town centre is 53%). Moving closer to Central London, as would be expected, the proportion of car-based journeys reduces, while public transport gains, until with Central London itself only 22% are car-based with 76% by public transport. Conversely, journeys to centres further out than Kingston - like Guildford, Staines and Ashford and places outside the M25 - are much more likely to be car-based.
- 2.25 Trips to supermarkets are overwhelmingly car-borne (**Table 2.15**). More than 70% of the Study Area households use a car for this purpose. Car borne trips in the Kingston zone account for 78% of all main food shopping trips, rising to well over 80% in Zones 6 (Epsom) and 7 (the Southwest), where car ownership is highest, but falling to just over half in the Zone 8, much of which lies in Inner London..
- 2.26 Day-to-day food shopping (**Table 2.16**) is mainly undertaken on foot or by bicycle. More than half (55%) of the Study Area households use these modes, while in individual zones the proportion varies between 39% and 67%.
- 2.27 Trips to purchase bulky comparison goods (**Table 2.17**) are car borne to a similar extent to journeys to supermarkets, though the remainder mainly involve public transport, rather than foot or cycle, as with convenience goods.

#### **Shopper attitudes**

- 2.28 In respect of shopper attitudes we firstly asked respondents a series of qualitative questions to determine why they use the centres where they shop and then we asked a set of questions to determine the level of satisfaction with those centres. The results are set out in Tables 2.18 to 2.27.

#### *Reasons for Choosing Shopping Location*

- 2.29 **Table 2.18** sets out the reasons why shoppers choose to shop in particular centres. Most of the responses can be grouped into three broad categories:
- those connected with proximity or ease of access (close to home/work; easy car parking; convenient bus service etc);
  - those connected with the quality, range or other characteristics of the centre's shopping offer (good selection/quality; good prices; specific shop etc); and

- those connected with the general environment (pleasant place to shop, everything under one roof etc).
- 2.30 With non-bulky comparison shopping such as for clothing & footwear the trade-off between these three categories normally favours the second (quality and range), with much lower emphasis on the first (environmental quality). It will be seen that Kingston town centre and Central London conform closest to this classic model, while the other centres gain more from ease of access than from their shopping offer. This finding underlines the message that Kingston town centre attracts shoppers from a wide catchment area principally for the quality of the current shopping offer and implies that the centres in the Study Area zones are failing to compete. Importantly Kingston is also considered to be a pleasant place to shop compared with the other locations listed (only Richmond out-scores Kingston). It is clear from Table 2.11 that many households use Central London for comparison shopping because they have members who work there. This reinforces the earlier conclusion that in normal circumstances the influence of Central London is surprisingly weak.
- 2.31 Respondents who shop in Kingston town centre were also asked whether, on their last visit, they had visited John Lewis, the Bentalls department store or the Bentalls Shopping Centre, and the results are set out in **Table 2.19**. Of the three, John Lewis is the most frequently visited shopping destination for Study Area shoppers, 48% of whom usually visit the store in the course of a shopping trip. The Bentalls Shopping Centre is a close second with a frequency of 40%, while the Bentalls Department Store trails in third place attracting a frequency of only 12%. However, we point out that little should be read into these proportions because a high proportion of shoppers regularly visit two or even all three stores/centres on shopping trips.

#### *Frequency*

- 2.32 The majority of households use the identified centres infrequently (once a month or less often) (**Table 2.20**). Many of those who gave other replies, indicating a higher frequency, probably made visits for convenience shopping purposes. Approximately two-thirds of shoppers visiting Kingston town centre do so on a monthly or more regular basis, which is a higher proportion than all other centres included in Table 2.20.

#### *Leisure Activity*

- 2.33 Many retail analysts maintain that the modern shopping experience is frequently combined with various forms of leisure activity. In previous studies we have found little evidence to support this hypothesis and this study is no exception (**Table 2.21**). This finding is borne out by a recent LGA report<sup>3</sup>, which found that the growth in leisure activity in town and city centres provided little linkage or benefit for retailing. The majority of those who used Kingston town centre said they rarely or never made such a combination, and for those who did, the other activity is no more than eating or drinking in a restaurant, pub or café (**Table 2.22**). It is only in Central London that visits to cinemas or theatres assumed major importance, but even there such visits are only made by a minority of shoppers.
- 2.34 In general, respondents seem satisfied with the leisure facilities offered (**Table 2.23**). For each category the majority said the relevant centre or store met their needs "very well" while no more than a few percent said "poorly". The recently opened cinema, bowling and other leisure provision at the Rotunda, together with the new theatre will make a significant further improvement to the leisure offer in Kingston town centre that will ensure residents and visitors have a leisure provision unparalleled outside the West End.

<sup>3</sup> LGA All Day and All of the Night, January 2002

### *Meeting the Needs of Shoppers*

- 2.35 **Table 2.24** compares the performance of the main centres for non-bulky comparison goods. Kingston centre performed well above the average for this category, with 86% of those who used it saying it met their needs very well. Croydon, Guildford, Central London and the various places outside the M25 also received above-average evaluations, but most of Kingston's closer competitors such as Epsom, Hounslow and Wimbledon performed less favourably.
- 2.36 Destinations for supermarket shopping (**Table 2.25**) and day-to-day food shopping (**Table 2.26**) demonstrate that the current provision in Kingston's 'home' zone, Zone 1, meets resident's needs very well. **Table 2.27** indicates a similar pattern to supermarket shopping of high satisfaction, for the provision of bulky comparison goods shopping.

### **Special Forms of Trading**

- 2.37 Respondents are asked whether they used "special forms of trading" for any of the three main shopping categories. This included ordering through the internet as well as by phone or mail. The proportions are largest with non-bulky comparison goods (**Table 2.28**), where there is a long tradition of mail order. But, even in this category more than four-fifths said they never used these media, and most of the remainder only "sometimes". Nevertheless, it is interesting that with each category, including convenience goods (**Table 2.29**) and bulky comparison goods (**Table 2.30**), there is a small proportion that said they used these special forms of trading "always" or "more often than not". With internet trading still in a barely-usable form this may be an indication of things to come.

### **Key Messages**

- 2.38 Below we draw out the key messages in respect of Kingston town centre highlighted in the household shopping survey.
- Kingston town centre's catchment area for non-bulky comparison goods is much more extensive than anticipated. The town centre retains a 70% market share from Zone 1 (the Kingston zone) and draws heavily from the eight outer zones (30% or more from most of the zones).
  - With expenditure growth on comparison goods currently increasing at 2.4%/annum<sup>4</sup>. Over time there will be considerable growth in available expenditure in both Kingston's home zone (Zone 1), and also in the surrounding zones. To retain Kingston town centre's current market share retailers will need to increase sales densities (£/sqm) and/or additional floorspace will need to be provided to meet the demand. A failure to meet the demand challenge will result in a loss of market share to competing centres elsewhere in London and beyond.
  - Two-thirds of households in the Study Area access Kingston town centre by car, approximately a quarter use public transport and 7% arrive on foot/cycle. This is a significantly higher proportion of car-borne trips compared with households visiting Croydon, Sutton or Hounslow (the three closest Metropolitan centres), where public transport or other non car-borne means are much more likely to be used. Although the proportion of car-borne trips to Kingston town centre reflects to some extent the more rural nature of the southern part of Kingston's catchment area stretching as it does into North-east Surrey, it never-the-less indicates that there is scope for public transport improvements.
  - The quality of the shopping provision in Kingston town centre is of over-riding importance in attracting shoppers to the town. Shoppers are less concerned with aspects such as proximity and ease of access, suggesting that distance and traffic congestion are not discouraging shoppers from visiting Kingston town centre.

<sup>4</sup> Data Consultancy expenditure projections based on ONS data

- Kingston town centre is considered to meet resident's shopping needs very well, whilst the main competing centres (such as Epsom, Hounslow and Wimbledon) are performing less favourably.
- The proportion of households that make a linked shopping/ leisure trip to Kingston town centre and indeed all other centres, except Central London, is much lower than anticipated by some commentators.
- Kingston town centre is considered to be a pleasant place to shop.

### 3 SHOPPER HABITS AND ATTITUDES

- 3.1 We assessed the habits and attitudes of shoppers using the Borough's main shopping centres through a series of street-side shoppers' surveys that were undertaken on 15<sup>th</sup> and 16<sup>th</sup> March 2002 for Surbiton, New Malden and Tolworth and throughout the week of 4<sup>th</sup> to 10<sup>th</sup> March in respect of Kingston town centre.
- 3.2 The surveys sampled a representative number of shoppers in each of the centres (605 in Kingston, 306 in Surbiton, 171 in New Malden and 102 in Tolworth) throughout the shopping day and at a number of different locations, thus avoiding any locational or time related bias.
- 3.3 The survey was based on the questionnaire that is reproduced at **Appendix 3** of this report, and which is accompanied by the survey results set out in 30 tables.

#### Characteristics of Respondents

##### *Socio-demographics*

- 3.4 Tables 3.1 to 3.4 set out the socio-demographic and residence characteristics of the people interviewed.
- 3.5 **Table 3.1** demonstrates that more than two-thirds of the respondents in each of the centres were female, except in Tolworth where the gender proportions were more balanced. The majority of respondents were aged between 20 and 59 years, though people aged 60 or over are more prominent in New Malden (36%) and Tolworth (25%) (**Table 3.2**). In all four centres two-thirds or more of the respondents' households have cars (**Table 3.3**).
- 3.6 **Table 3.4** gives the place of residence of the respondents, coded by postcode district. We have identified the catchment area for each centre by selecting those postcode districts that contain around 85% of the respondents for that centre. These postcode districts are shown in **bold** typeface on the table. With each catchment, the postal districts are contiguous, but it will be seen that there is some overlap. In respect of the three smaller centres, KT1 and KT5 are common to Surbiton and New Malden. KT3, KT4 and KT5 are common to New Malden and Tolworth. All of them overlap with the Kingston catchment area, which we illustrate on **Map 2, Appendix 2**.
- 3.7 It is evident that Surbiton, New Malden and Tolworth all have compact catchment areas. For each of these centres it is only necessary to select around 6 postal districts to achieve the target of around 85% coverage. But for Kingston it is necessary to select just about every Postal District on the list. The resulting geographical coverage almost exactly replicates the Study Area of the household survey (described in the preceding section) and reinforces the view that Kingston town centre draws from a wide catchment area. It should be noted that on-site surveys have a tendency to understate the size of a catchment area. People from the fringes of a catchment tend to visit the centre less frequently than those who live well inside and therefore have a lower chance of being captured by a survey of this type. This effect is rarely outweighed by the fact that such people do tend to spend longer in the centre on each visit.

#### Trip Characteristics

##### *Purpose of visit*

- 3.8 For most respondents, the main purpose of the visit is some form of shopping. The proportion varied from 77% in Kingston down to 53% in Tolworth (**Table 3.5**). In the latter centre many respondents are visiting banks, building societies or the post office, while others are visiting simply because they worked there, or happened to live there. In Kingston, the main type of shopping that draws in the visitors is the

non-bulky comparison goods and the miscellaneous "other" non-food category, which together account for two-thirds of all trips (food trips account for 12%). In the other towns, the main reason for the trip was for food. In New Malden for example 57% of trips are primarily for supermarket shopping or shopping for smaller food and grocery goods.

#### *Frequency of visit*

- 3.9 The frequency of visits (**Table 3.6**) to Kingston town centre are rather lower than the frequency to the other Kingston centres, with less than half visiting more than once a week, against two-thirds or more in the other centres. This is presumably because of Kingston's emphasis on non-food shopping, and the fact that a lower proportion of respondents work or live there compared to the other centres. However, 62% do visit Kingston town centre once a week or more often, which emphasises the centre's role as a local centre in addition to its Metropolitan function.

#### *Duration of visit*

- 3.10 The length of the shopping trip is set out in **Table 3.7**, which indicates that shoppers unsurprisingly tend to stay longest in Kingston compared to the Borough's other centres. The great majority of shoppers are there for one hour or more, while in the other places a half or more are there for less than one hour. In part this is because the Kingston visitors are not just making short trips for food and groceries. Interestingly all the centres (except Tolworth, which is higher still) exhibit similar proportions for the longest frequency, over four hours. This is likely to be explained by significant numbers of shoppers in the three smaller centres combining a shopping trip with work.

## Transport

#### *Mode of Access to the Centre*

- 3.11 The next set of tables (tables 3.8 to 3.21) deal with the means of access, trip length and related qualitative issues. Almost half (46%) of trips to Kingston are by car, while the corresponding figure for Surbiton is 42%, and for New Malden and Tolworth the figure is roughly a third (**Table 3.8**). In Kingston another third used public transport; elsewhere public transport accounts for much smaller proportions, though the proportions that walk is higher, which emphasises the important role these centres play in providing for local needs. It should be borne in mind that for the reasons given above at paragraph 3.7 the shopper survey does not fully reflect the mode of access to Kingston and the other centres and that the household survey presents a more accurate account in this respect.
- 3.12 **Table 3.9** demonstrates that average journey times to Kingston are longer than elsewhere: most take longer than 10 minutes and 36% take more than 20 minutes. With the other centres, where a high proportion walk-in, journeys are generally quicker with less than 10 minutes being the most common journey length.
- 3.13 **Table 3.10** is a cross-tabulation of journey length by mode of access to Kingston town centre. The table shows that the vast majority of walking journeys to Kingston centre took less than 20 minutes, with 42% taking less than 10 minutes. Trips by cycle are also relatively short. Some car-based journeys are also short, but a substantial proportion exceeded 20 minutes. Only 6% of journeys take longer than 45 minutes and these are all motorised.
- 3.14 **Table 3.11** is again confined to the Kingston sample and shows how mode of transport varies by place of residence. We have grouped respondents' home addresses into just two zones, (1) the "core" zone is identical to the central zone used in the household survey (covering the postcode districts KT1 to KT3; KT5 to KT10; KT12; TW11 and TW12), and (2) the remainder of the Study Area outside the core.
- 3.15 Not surprisingly, people living outside the core make few journeys by foot or cycle. It is likely that most of those recorded are not home-based, but consist of short trips from workplaces and the like. Car

journeys are roughly evenly distributed, between those living in the core and those living outside. Bus journeys are also evenly distributed, but all of the train journeys are made from outside the core. Perhaps this latter fact reflects the limitations of the Kingston rail 'loop' in terms of frequency of service, cost relative to journey length and convenience of access either end of the train journey.

- 3.16 In all four of the Borough's shopping centres more than 90% of respondents have no problem with their journey (**Table 3.12**). With those who had, traffic congestion is the main complaint.
- 3.17 The destination car park for car-borne shoppers is set out in **Table 3.13**. The table demonstrates that in Kingston almost half of all shoppers use the Bentalls or JLP car parks and a further fifth use the Eden Walk car park. Interestingly no shopper used the Brook Street car park. In Surbiton the Sainsbury and Waitrose car parks account for nearly two-thirds of all parking, while a sizeable proportion (17%) park on-street. In both New Malden and Tolworth almost 40% of car parking is on-street although Waitrose and Blagdon Road account for a further 40% and in Tolworth the Marks and Spencer car park accounts for 36% of all parking.
- 3.18 The following set of tables (**Tables 3.14 to 3.19**) give the bus service used, together with users' evaluation of frequency, reliability and the convenience of the location of bus stops. Comments on the bus services are generally favourable, with only a small minority dissatisfied with the frequency, reliability or location of stops. There does seem to be a concentration of complaints on certain bus routes, but the sample numbers are too small for statistical significance.
- 3.19 **Tables 3.20 and 3.21** present the survey findings in respect of frequency and reliability of rail services. There may appear to be rather more complaints about train service, but the sample numbers are too small to be statistically significant.

## Shopper Attitudes

### *Choice of shopping destination*

- 3.20 The next series of tables (tables 3.22 to 3.29) deal with identifying the main centres visited by shoppers, which other centres are visited as an alternative, and how these alternative centres compare in terms of a qualitative rating.
- 3.21 **Table 3.22** assesses whether the centre that the shopper was interviewed in is in fact the main centre for comparison goods shopping. Most of the Kingston respondents (71%) said that this is their main centre for clothing & footwear, which is no surprise; given that Kingston is the major comparison centre for the Study Area. By contrast the proportions in the Borough's other centres are much lower, which is unsurprising given that they specialise to a large extent in food shopping.
- 3.22 **Table 3.23** compares the responses to the 'which is the main centre for comparison goods' question varied by place of residence. About two-thirds of those answering "yes" live inside the Kingston core zone. At the same time, an appreciable number of those living inside the core said that Kingston is not their main centre for clothes & shoes. This closely matches the finding of the household survey, which indicated that Kingston town centre has a market share of 69% from the Kingston zone.
- 3.23 **Table 3.24** sets out the most frequently visited 'other' shopping centre. Kingston is the main alternative centre for comparison goods shopping for the other three Kingston centres. The alternatives are numerous, but principally Central London and Richmond. A number of Kingston shoppers gave "Kingston" as the next most important shopping place. These are not mistakes: the respondents appear to be referring to places in Kingston outside the main centre.
- 3.24 Tables 3.25 and 3.26 set out shoppers' views on the relative attraction of the various centres. **Table 3.25** compares how people rate the shopping experience in the current centre (i.e. the centre where they were interviewed) compared with the centre mentioned in the previous question (as set out on

Table 3.24). Kingston town centre scored well with only 11% considering Kingston to be worse than the alternative centre, but the Borough's district centres scored poorly. This is not surprising given that these centres are compared predominantly to Kingston town centre.

- 3.25 **Table 3.26** is a cross-tabulation that is confined to Kingston respondents, so the answers compare Kingston with the other centre identified in Table 3.24. The comparison is favourable. No centre is considered to be better than Kingston. In all centres more than half of the respondents considered that Kingston is "better" or "much better" than the alternative centre, except when compared with Central London. But even with Central London the proportion considering Kingston to be better is higher than those who think it worse.

*Likes in respect of the Borough's town centres*

- 3.26 **Table 3.27** assesses the reasons why shoppers use the Borough's centres. Of all the reasons why, "Close to home" is most regularly mentioned in all four centres, but was much more prevalent in the three smaller centres, clearly because of the characteristics mentioned above. With Kingston, the range and quality of shopping is the other main consideration. The response rate to this question in Tolworth was extremely low and no statistical significance should be placed on the results.

*Dislikes in respect of the Borough's town centres*

- 3.27 The 'dislikes' about the centres are set out in **Table 3.28**. In Kingston town centre the availability and cost of parking and traffic congestion were identified as the principal dislikes. Additionally, significant proportions consider Kingston town centre to have an unpleasant shopping environment, a poor standard of cleanliness and to be unsafe/threatening. It is also interesting to note that in Kingston town centre no respondents cited a 'pleasant shopping environment' as a reason why they use the centre (Table 3.27).
- 3.28 The proportion of shoppers giving 'no dislikes' is also significant. This is generally high, but is much lower in Tolworth, the main complaints in Tolworth concern the range and quality of the shopping, the dirty streets, poor shopping environment and safety/security.

*Non-shopping Uses*

- 3.29 **Table 3.29** assesses the propensity of shoppers to link their shopping trip with specifically identified non-shopping facilities. The table demonstrates that the majority did not mention any non-shopping facility. None-the-less the riverside area at Kingston is popular, as are the libraries at Surbiton and Tolworth. But the majority of those who do make use of such facilities gave a wide range of miscellaneous facilities such as banks and the Post Office.

*Improvements*

- 3.30 **Table 3.30** assesses the need and opportunity for improving the centres. Once again Tolworth was identified by respondents as providing the greatest room for improvement. The main suggestions for Tolworth relate to the range and quality of shopping, street cleaning and the pedestrian environment. The range of shops is also an issue in New Malden and Surbiton, but not in Kingston town centre.
- 3.31 In Kingston town centre less than 40% of shoppers put forward any suggestions at all, indicating a general level of satisfaction with the town centre. However, of those that did the need for improvements in respect of parking and street cleaning are seen as being key.

**Key Messages**

- 3.32 We draw out the following key messages from the shoppers' survey:

- The vast majority of shoppers visit Kingston town centre for comparison goods shopping reasons. The main reason for visiting the district centres is for food shopping purposes.
- The survey highlights the importance of specific car parks in each of the centres in accommodating large proportions of car borne shoppers. Two-thirds of car borne shoppers in Kingston for example use just three car parks (Bentalls, John Lewis and Eden Walk).
- In terms of the attraction of the centres Kingston compares very favourably with competing town centres beyond the Borough. Indeed no other centre is considered to provide a better shopping experience than Kingston town centre.
- There is relatively little trip linkage between shopping in Kingston town centre and leisure pursuits.
- The common areas of dissatisfaction across all the town centres are the availability and cost of car parking facilities (Tolworth excepted), to which traffic congestion should be added for Kingston town centre. Additionally the poor quality of the shopping environment and the standard of street cleanliness are also key issues in all the centres. The feeling of threats to personal safety is also a factor in Kingston town centre and Tolworth.

## 4 SHOPPER HABITS AND ATTITUDES: SAINSBURY, RICHMOND ROAD, KINGSTON

- 4.1 In accordance with the Study brief we undertook an exit survey of the shoppers using the new Sainsbury store on Richmond Road, Kingston to establish shopping patterns as they have developed in the first few months since the store commenced trading in November 2001. The survey was carried out on a weekday and a Saturday in March 2002 using a questionnaire that is replicated at **Appendix 4** and involved a total of 201 interviews.
- 4.2 The tabulated responses (Tables 4.1 to 4.27) to the questions are also presented at **Appendix 4**. Each table is subdivided by the mode of transport used to reach the store. Respondents are grouped into car-borne ('car riders') and non-car borne ('other'). We make this division due to the significant proportion (40%) of non-car borne shoppers using the Sainsbury store to ascertain if there are significant differences between the two groups in terms of shopping habits and attitudes.

### Characteristics of Respondents

#### *Socio-demographics*

- 4.3 **Tables 4.1 to 4.4** set out the characteristics of the survey sample. Almost nine-tenths of the respondents are women and virtually all are aged between 20 and 60 years old. Some 87% of households have access to a car.
- 4.4 **Table 4.4** indicates that the majority (61%) of the respondents live in the KT2 postal district. Most of the remainder are scattered around 13 other districts, all grouped around Kingston centre. As might be expected, 'car riders' are rather more widely dispersed: 55% of them live in KT2 compared with 71% of the 'others'.

### Trip Characteristics

#### *Purpose of visit*

- 4.5 **Table 4.5** sets out the reasons why shoppers choose to shop at Sainsbury, Richmond Road. The main reason is the close proximity to the respondents' home, friends, work or children's school. Smaller numbers mentioned the store's shopping offer, such as good prices, good quality and a pleasant shopping environment.

#### *Frequency of visit*

- 4.6 Some 70% of respondents shop at the store once a week or more often (**Table 4.6**). Non-'car riders' are more frequent shoppers: more than half said they used the store more than once a week against 25% of car-riders.
- 4.7 When asked whether the store is their main foodstore (**Table 4.7**), rather more than half said "yes". It seems, however, that there is some reconsideration when we probed into this issue, for more than half subsequently named another store as their main choice (**Table 4.8**). The most frequently mentioned alternatives are Asda at Norbiton, Tesco, New Malden, M&S in Kingston; and Sainsbury, Richmond.
- 4.8 More than 80% said they shopped at the above stores at least once a week (**Table 4.9**). Since the proportion is 70% at Sainsbury, Richmond Road, Kingston (see paragraph 4.6 above) it is clear that a large part of the sample are making fairly extensive use of more than one supermarket at the present time which reflects the settling down period that occurs when new facilities open and shoppers experiment with the new store while also shopping at another location.

- 4.9 We asked respondents where they undertook their main food shop prior to the opening of Sainsbury. The most frequently mentioned stores are the Asda in Norbiton and the Tesco store at New Malden together with the two principle Kingston town centre foodstores (Sainsbury, Eden Walk and Waitrose) (Table 4.10).

## Transport

### *Means of Access*

- 4.10 Table 4.11 shows that 59% of shoppers arrive at Sainsbury by car, either their own vehicle or one belonging to a friend or other person. Rather more than a third walk or cycle, but very few use public transport.
- 4.11 Approximately two-thirds of shoppers take less than 10 minutes to get to Sainsbury's (Table 4.12), which accords with the type of catchment area we would expect for a convenience store in such a location. There is no significant difference between the time taken by car owners and the 'others' to travel to Sainsbury. Unsurprisingly from the analysis of residence (Table 4.4) 'car riders' are shown to travel greater distances compared to 'other'.

### *Parking Charges*

- 4.12 Tables 4.13 and 4.14 deal with the issue of parking charges at the Sainsbury car park. The survey asked whether respondents considered the charges to be reasonable and whether their mode of transport to the store had been influenced by these charges. Most shoppers, regardless of the mode of travel, think that the parking charges are unreasonable (Table 4.13). Unsurprisingly the highest proportion of shoppers that consider the charge unreasonable are the 'car riders' (bottom two rows of Table 4.13). The majority of non- 'car riders' had views on this issue, and around a third said it had influenced them (presumably in the direction of leaving their cars at home) (Table 4.14). Certainly the level of car usage by shoppers at the store (60%) is significantly lower than what is normally found in surveys of large out-of-centre convenience goods stores. We would expect the store, were it not to have parking charges, to attract 75-80% of shoppers by car. The clear message is that the charging policy at the time was deterring people from making car-based trips to the supermarket; the charging policy was subsequently modified.

### *Trip Linkages*

- 4.13 We asked respondents whether they had, or intended to, visit Kingston town centre as part of the current shopping trip (Table 4.15). Only a quarter replied in the affirmative - car drivers much less frequently than the 'others'. Of those visiting the centre, most are doing some other form of shopping (Table 4.16).
- 4.14 Of the small number of 'car riders' making a linked trip visit to Kingston town centre all make the trip between the superstore and the town centre by car, whilst 'others' tend to make the journey on foot (Table 4.17).
- 4.15 The main reasons for making the linked shopping trip relate to proximity and ease of access ("close to home, work or the bank, easy to get to"), while a smaller number gave shopping reasons, principally the good range and quality of shops (Table 4.18).
- 4.16 Table 4.19 disaggregates the reasons for using Kingston town centre by respondent place of residence, divided into the postal district KT2 (the postcode district where the store is located) and all other districts. Table 4.19 indicates that those living outside KT2 had unsurprisingly a slightly lower tendency to mention proximity and ease of access and a greater tendency to stress the range and quality of shopping in the centre as reasons for combining their food shop with a trip to Kingston town centre.

The differences are not large, which is plausible, as most of those living outside KT2 still occupy the inner part of Kingston's catchment area for comparison shopping.

## Shopper Attitudes

### *Choice of shopping destination*

- 4.17 All respondents were asked whether Kingston is their main centre for clothes shopping (Table 4.20). Almost 90% confirmed that it is, there being little difference between car-riders and the 'others'.
- 4.18 Respondents were asked what other places they used for (any kind of) shopping (Table 4.21). The main replies are for Richmond (54%) and Central London (13%).
- 4.19 Respondents were then asked how they rated Kingston in comparison with the centre most regularly visited (i.e. the centres identified at Table 4.21). Approximately 60% considered Kingston to be "better" or "much better" and only 12% considered it to be worse (Table 4.22). These figures are almost identical to the results from the Kingston town centre survey.
- 4.20 Table 4.23 compares the respondents rating of Kingston against the two centres (Richmond and Central London) that are mentioned in more than meagre numbers (although Central London had only 18 mentions). Kingston performs well against Richmond, but with Central London the balance appears more even. Again this is a very similar response to the same question in the Kingston town centre shoppers' survey.

### *Dislikes in respect of Kingston town centre*

- 4.21 Table 4.24 sets out the responses in respect of those shoppers that do make linked shopping trips to Kingston town centre, and what they dislike about the town centre. Almost half the respondents said there is nothing that they particularly dislike. This response again reinforces the view that taken overall Kingston town centre currently provides a more than adequate shopping destination. Those dislikes that were registered related to car parking, unclean streets and the quality of the physical shopping environment. Once again paralleling responses to the town centre survey.
- 4.22 Table 4.25 disaggregates reasons for disliking the Kingston centre by place of residence. There is a plausible tendency for people living outside KT2, and therefore having a higher propensity to drive to the centre, to complain about car parking in terms of both provision and cost.

### *Non-shopping Uses*

- 4.23 All respondents were asked what non-shopping facilities they had used (or planned to use) on the current trip (Table 4.26). It must be borne in mind that most respondents appeared to make a dedicated supermarket trip (as we have seen only a quarter are going to Kingston centre). So, it is not surprising that 90% are not using any kind of non-shopping facility. On this point, there is little difference between car-riders and the 'others'.

### *Improvements*

- 4.24 In keeping with the general lack of complaints about Kingston town centre, about 40% of respondents had no suggestions for how the town centre could be improved (Table 4.27). Those suggestions that are made, once again related to a perceived need for more and cheaper parking and for improvements in street cleaning.

## Key Messages

- 4.25 Below we draw out the key messages in respect of the Sainsbury shoppers' survey.

- Car parking charges at the Sainsbury store at the time of the survey were widely regarded as unreasonable and appeared to be deterring shoppers from making car-borne trips.
- The Sainsbury store caters for a local catchment area. The principle reason why shoppers use the store is convenience in terms of access and two-thirds of shoppers using the store have a journey time of 10 minutes or less.
- Shoppers have been diverted to the new Sainsbury store from a wide range of other stores. Impact has fallen principally on Asda at Norbiton and Tesco, New Malden. However, stores in Kingston town centre have experienced diversion, but at levels unlikely to be seriously detrimental. The other main element of the customer diversion has been from other Sainsbury stores in the locality as shoppers retain retailer loyalty, but switch to a bigger and/or more conveniently located store.
- There is some, but limited shopping trip linkages between the store and Kingston town centre. A quarter of those who shop at the store also shop in the centre on the same trip. The vast majority of shoppers making a linked trip are non-car borne, and make that trip on foot.
- Respondents' views about Kingston town centre confirm the findings of the general shoppers' survey and the household survey - that Kingston is highly rated as a shopping centre, which performs a very satisfactory role in providing quality shopping in a generally conducive shopping environment. However, the availability and cost of parking and the up-keep of the street environment in terms of cleanliness and general pleasantness are issues of concern to a significant proportion of shoppers.

## 5 RETAILER/BUSINESS SURVEY

- 5.1 In accordance with the study brief we have conducted a retailer/business attitudinal survey. The survey was conducted through a postal questionnaire and sampled retailers/businesses currently trading in the Borough's four town centres and also retailers currently not represented in the Borough.
- 5.2 The survey of those retailer/businesses currently trading was carried out using a random sample of 500 organisations across the four town centres using a mailing list supplied by the Chamber of Commerce. The questionnaires were mailed out in March/April and three weeks were allowed for responses. The survey yielded a total of 115 responses. Response rates varied across the four centres as follows:
- Kingston – 67 responses (23%)
  - New Malden – 17 responses (24%)
  - Surbiton – 22 responses (17%)
  - Tolworth – 9 responses (39%)
- 5.3 A copy of the questionnaire is replicated at **Appendix 5**. The questions broadly divide into four topic categories, these being:
- the characteristics of the respondent businesses;
  - the general trends in the performance of the business over the past 12 months;
  - the strengths and weaknesses, general performance and changes in the town centres; and
  - the mode of transport used by employees to get to work and the means and frequency of deliveries to the businesses.
- 5.4 **Tables 5.1 to 5.13, at Appendix 5**, set out the responses from the traders in each centre.
- 5.5 A second element of the work involved a survey of retailers not currently represented in any of the Borough's town centres, but who are known to have an interest in gaining representation in Kingston town centre<sup>5</sup>. From a sample of 100 retailers mailed we received 14 responses, which is a low response rate, but reflects the fact that retailers with no current links with the town are less likely to respond than retailers with a current interest.
- 5.6 The questionnaire (a copy of which is attached at **Appendix 5**) focused on the following issues:
- type of business;
  - desire to gain representation in Kingston town centre;
  - length of time seeking representation;
  - strengths and weaknesses of Kingston town centre; and
  - constraints on the search for premises in Kingston town centre.
- 5.7 **Tables 5.14 to 5.19, at Appendix 5**, set out the responses of the non-represented traders to the questions asked.
- 5.8 Below we analyse the findings of both surveys, starting with Kingston, followed by the review of retailers not currently represented in Kingston town centre, then moving on to consider the views of traders in the three district centres. In the final section we draw out the key messages.

### Kingston Town Centre

- 5.9 In this section we consider the responses of the traders in Kingston town centre to the survey questionnaire.

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<sup>5</sup> Information on retailers with a known requirement for representation in Kingston town centre was obtained from the Property Intelligence's Focus database.

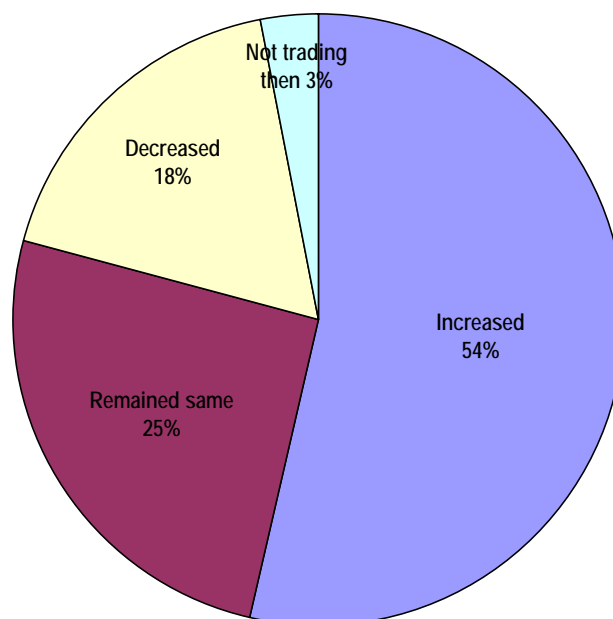
### *Characteristics of Respondents*

- 5.10 The characteristics of the Kingston sample are set out in **Tables 5.1 to 5.3**. The results indicate that over half of the businesses that responded to the survey are national multiples, with independents comprising about a third. Only a small proportion of the businesses surveyed are local/regional multiples.
- 5.11 Over half the respondents employ less than 10 members of staff. About one-fifth of the sample includes businesses that employ over 50 staff.
- 5.12 Nearly two-thirds of respondents have been trading in Kingston town centre for over 10 years and three-quarters for over 5 years. The sample includes only a small proportion of businesses that have become established in the town in the past 2 years.
- 5.13 We consider that the sample is representative of the overall type and distribution of retailers/businesses in Kingston town centre.

### *Trading Performance*

- 5.14 Respondents were asked whether their business had experienced changes in trade over the past 12 months, the results are set out in **Table 5.4** and illustrated in **Figure 5.1** below.

**Figure 5.1: Change in turnover in the last 12 months**



- 5.15 Of the businesses surveyed over half consider that turnover has increased in the last 12 months. A quarter consider that turnover had remained stable, while approximately a fifth have experienced deterioration in trading conditions over the period.
- 5.16 Respondents were also asked what, if any, local external factors had contributed to the change in performance. Reasons why turnover had increased were cited and included the opening of the Charter Quay development and the closure of Littlewoods and C&A, which presumably benefited some clothing traders in the town centre.

- 5.17 Respondents also cited reasons why they considered turnover had decreased over the period. The reasons included the high cost of car parking and other businesses being forced to relocate due to the high rents in the town centre.
- 5.18 We have also assessed turnover performance against the type of town centre location, using the UDP definition of primary and secondary retail frontages. The results are presented in **Table 5.5**. Of the businesses surveyed in the primary shopping area (PSA), nearly two-thirds considered that their turnover had increased over the last 12 months. Furthermore, approximately half of respondents in the secondary and tertiary shopping areas (SSA and TSA) have also seen growth over this period.
- 5.19 This pattern of trading performance is not unexpected, as the PSA is by definition the most vibrant and vital shopping location. However, the fact that a significant proportion of businesses in secondary and tertiary locations are also experiencing improved trading conditions is encouraging and suggests that these areas are performing reasonably well.
- 5.20 Whilst trading conditions may be good at the present time for many of the retailers in Kingston town centre the survey indicates that the trading conditions are less rosy for the main anchor stores.–We have seen trading figures and other baseline data that demonstrates that some of the key anchor stores in the town have experienced static trading conditions over the past 18 months to two years. For reasons of confidentiality we cannot identify individual traders, but we can report that the levelling off of turnover in the main anchor stores is not just confined to one store and should be viewed against the background of the much better trading conditions at other stores within each retailer's trading group. Maintaining growth in turnover and profitability is essential for all retailers so that investment can take place and the business can keep pace with ever increasing overheads. One issue that helps to illustrate this point is staff wages. Kingston's location and proximity to Central London means that wages have to be very competitive to recruit and retain suitably qualified and experienced staff. Whilst similar problems are experienced by traders in other centres in similar proximity to Central London it is particularly an issue in Kingston where house prices/rents are higher than equivalents in centres such as Croydon or Bromley.
- 5.21 The main anchor retailers consider that the primary issues that are contributing to the difficult trading conditions relate to infrastructure considerations principally the poor accessibility to the town centre and a shortfall in the availability of car parking. There is a consensus viewpoint amongst the anchor stores that dealing with these issues is fundamental to the long-term future of Kingston town centre.

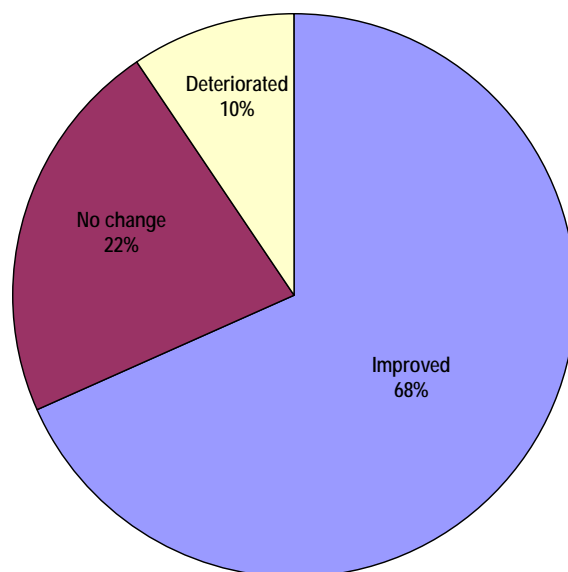
### *Town Centre Performance*

- 5.22 Respondents were asked to rank the three most important strengths/weaknesses of Kingston town centre. In order to analyse the results we have applied a weighting system, whereby respondents' first choices are weighted highest (allotted a score of 3), the second choices are weighted second (score 2) and third choice receive a weighting score of 1. The weighted scores are set out in **Tables 5.6 and 5.7**.
- 5.23 The analysis of **Table 5.6** indicates that the key strengths of Kingston town centre are:
- the range of shops (receiving much the highest weighted response (108));
  - ease of access to the centre for shoppers (second highest response (61));
  - public transport links (a close third highest at 57); and almost matched by
  - quality of shops (56).
- 5.24 The responses confirm that the range of shops in Kingston town centre is the over-riding strength, and traders consider that accessibility to Kingston to be reasonably good. We consider that the traders' view that accessibility is reasonably good does not contradict the views of the main anchor stores that accessibility is a major problem. Access to Kingston town centre is, in our view, reasonable by both private and public transport, but the routes into the centre by car do experience considerable congestion especially at peak shopping times. We have been shown evidence that visitor numbers to Kingston town centre have risen steadily over a number of years, but that over the past 18 months to

two years visitor numbers in Kingston town centre have plateaued. We consider that a major determining factor in the levelling off of visitor numbers is that road congestion has reached the point where visitors are no longer prepared to queue and are diverting to other centres. Beyond the four aspects mentioned above no other significant strengths were identified.

- 5.25 **Table 5.7** identifies the key weaknesses of Kingston town centre. These are:
- the cost and availability of car parking (both factors score over 90, which is much higher than the next highest factor);
  - ease of access to the centre for shoppers (scores 58); and
  - the public transport links (scores 29).
- 5.26 The over-riding weakness as perceived by existing traders is the cost and availability of car parking. As mentioned above, ease of access to the centre for shoppers, which is identified in **Table 5.6** as a strength of the town centre, is also identified as a weakness. This indicates that although some modes and routes of access to the town centre may be satisfactory, others are less so. The parking/accessibility issues (notably on the question of a permanent park and ride facility) are being considered by current and proposed studies.
- 5.27 Respondents were asked how the trading performance of Kingston town centre had, in their view, changed over the last five years and the results are set out in **Table 5.8**, and are also illustrated in **Figure 5.2** below.

**Figure 5.2: Trading performance of Kingston town centre over the last five years**



- 5.28 Over two-thirds of the respondents considered that trading in Kingston town centre had improved over the period, although nearly a quarter considered that the centre had neither improved nor deteriorated. Only a small proportion (10%) thought that the town centre had deteriorated.
- 5.29 We have also compared the perceived performance of Kingston town centre as a whole against the location of the businesses in terms of UDP frontage definitions and set out the results in **Table 5.9**. The results indicate that the perceptions of the trading strengths of the town centre as a whole vary little

between the different retail frontages. Indeed marginally more traders in the secondary and tertiary locations than in the primary locations considered trading in the town centre to have improved. This reinforces the view that the success of Kingston town centre is not just confined to the PSA; and the SSA and TSAs have also improved over the last five years.

5.30 Respondents were asked what factors, if any, would in their view improve the town centre and the results are shown in **Table 5.10**. The key factors identified are:

- the provision of more parking (receiving 47 mentions);
- improved access to the town centre (31);
- improvement in the cleanliness of the streets (23);
- provision of a better range of shops (14);
- improving the pedestrian environment (14);
- the provision of leisure facilities (principally a swimming pool (a swimming pool is already available approximately 400 metres from the shopping core at the Kingfisher Leisure Centre) and ice skating (11); and
- the pedestrianisation of particular streets (principally the Market Place).

5.31 Improvements in parking and access are identified as the key factors that would benefit the town centre. The quality of the shopping environment is also identified as a factor in need of improvement.

### *Transport*

5.32 Respondents were asked to identify the most common mode of transport used by their employees to get to work. The results are presented in **Table 5.11**. Car or bus are the main forms of transport used by employees to get to work for 85% of businesses. The results indicate that public transport (bus or train) is the main mode of transport used by employees to get to work for over half of all businesses in Kingston town centre, which we consider to be a healthy proportion. However, the train is the dominant mode of transport for relatively few businesses, and the proportion of businesses where walking is the dominant mode (5%) is disappointingly low, but in our view is unlikely to be very different from the proportions of town centre workers getting to work on foot in other comparable towns.

5.33 Respondents were asked about the mode of transport and frequency by which deliveries are received. The results are presented in **Tables 5.12 and 5.13**. The dominant modes of delivery are the smaller vehicles (vans and smaller lorries), although large lorries are the means of delivery for one in five town centre businesses. Only a small proportion (8%) of businesses received delivery by car.

5.34 In terms of frequency, deliveries by all modes are most commonly received either weekly or more regularly. No business receives deliveries on less than a weekly basis, and only a small proportion (9%) of businesses receiving deliveries by van do so on a daily basis.

### **Retailers Not Currently Represented in Kingston Town Centre**

5.35 We now turn to consider the views of retailers not currently represented in Kingston town centre.

### *Business type*

5.36 The businesses types of the respondent retailers are set out in **Table 5.14**. The proportions of respondent retailers are evenly divided between independents and national multiples, and it is assumed that this composition reflects the broader market demand for representation in Kingston town centre.

*Desire for representation*

- 5.37 **Table 5.15** sets out the responses in respect of the desire to gain representation in the town. The emphasis of the responses is very much at the very/extremely keen end of the spectrum, with almost 90% expressing such an interest, while no respondents expressed moderate interest and only two (13%) are no longer interested.

*Duration of search*

- 5.38 The length of time that retailers have been seeking representation in Kingston town centre is set out in **Table 5.16**. Over half of all traders have been looking for premises for more than a year, suggesting that there are supply-side problems with the provision of suitable retail premises. It is relevant to note that the latest available shop vacancy rates in Kingston town centre are just 3% within the PSA, 5% in the SSA and 5% overall<sup>6</sup>. These very low rates are well below the current benchmark vacancy rates for centres in the South-east, which stands at 9%<sup>7</sup>.
- 5.39 Our discussions with local/national commercial property agents (a review of which is presented in the retail property market section of this report) bears out the survey findings and demonstrates that there is a singular lack of available shop premises in Kingston town centre. Comparatively little property, especially in the prime shopping frontages, is available on the open market at any one time, and property that does become available tends to be highly sought after by prospective tenants. There is a supply-side shortage of premises in all size bands right across the town centre, but especially of units between 370 sqm – 560 sqm (4,000 - 6,000 sqft), which is the preferred size for the main fashionwear multiples such as Gap and Monsoon and the new breed of fashionwear retailers such as Zara.
- 5.40 The situation is similar, but not so intense, in other nearby centres such as Wimbledon and Croydon, and indeed the national picture is of retailers seeking larger unit sizes and being prepared to sacrifice pitch to satisfy their space requirements<sup>8</sup>. The indications are that gaining representation in Kingston town centre requires retailers to both outbid the competition in terms rentals and also to be more patient than they are required to be elsewhere.

*Strengths and weaknesses*

- 5.41 Respondents were asked to rank the three strengths/weaknesses of Kingston town centre they considered to be most important. In order to analyse the results we have used the same weighting system as applied in the other retailer surveys. The aggregated scores for all the strengths and weaknesses are set out in **Tables 5.17 and 5.18**.
- 5.42 Respondents perceive Kingston town centre to be a good shopping location where they are likely to benefit from the wide attraction of the centre as a comparison shopping destination, and they also view Kingston as a centre that is easy for shoppers to access. The general atmosphere of the shopping environment and the centre's image are also seen as positive aspects of Kingston town centre.
- 5.43 The key weakness identified is the perceived lack of availability of car parking, which scored double the next highest scoring weaknesses, which are the pricing of car parking, the lack of provision of leisure facilities, the standard of street cleanliness and the ease of access to the centre. Other weaknesses mentioned, but much less frequently, include both the range and quality of the shops and shop servicing arrangements.

<sup>6</sup> source: RBK 2001 shop survey

<sup>7</sup> source: Experian Goad (outlet count 2002)

<sup>8</sup> Colliers CRE Midsummer Retail Report July 2002

*Constraints on the search for premises*

- 5.44 The final question, the results of which are presented in **Table 5.19**, asked if any particular constraints had been encountered by traders searching for premises. The main constraint encountered is the lack of appropriately sized property, a close second, was high rents and thirdly (and referred to much less frequently) the lack of property in the right location.
- 5.45 The survey indicates that the over-riding constraint to traders seeking representation in the town is therefore the lack of appropriately sized premises combined with the issue of high rents, rather than the lack of property in the right location, which is retailers' traditional prime consideration. This infers that retailers view most pitches in Kingston town centre as being acceptable and capable of generating sufficient footfall to produce a good trading environment. This suggests that if premises of the right size and at an affordable rent were available within the town centre there would be demand from retailers regardless of the specific location.

**The District Centres**

- 5.46 In this section we compare the results of the retailer/business (traders) survey responses for the three district centres (New Malden, Surbiton and Tolworth) with each other and also, where appropriate, contrast with the results from Kingston town centre.

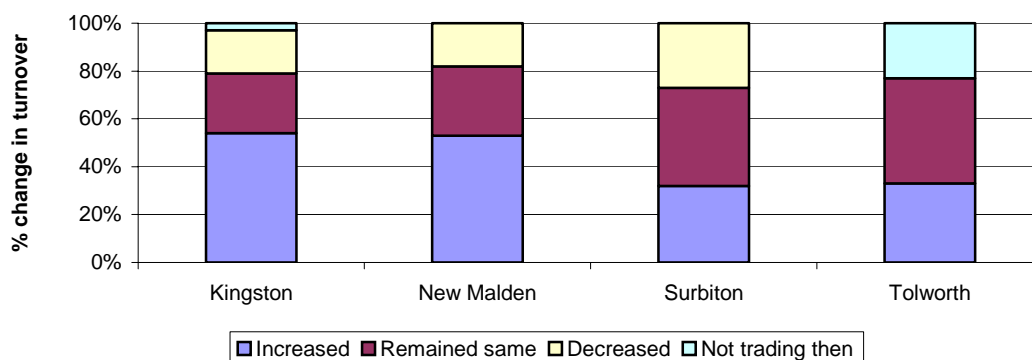
*Characteristics of Respondents*

- 5.47 **Tables 5.1 to 5.3** set out the characteristics of the respondent traders within the three centres. All three centres share very similar characteristics in terms of the types of traders, number of employees and the length of time traders have been in business in the centres. In all three centres over two-thirds of respondent traders are independents (in Surbiton 100% of the respondents were independents). This contrasts with Kingston where approximately only one-third of respondents are independents.
- 5.48 In each centre over three-quarters of the respondents have less than 9 employees, and with the exception of one respondent in Surbiton, none has any large (50+ employees) businesses.
- 5.49 The vast majority of traders in New Malden and Surbiton (94% and 86% respectively) have been in business for over 10 years, which is significantly higher than the Kingston figure of 61%. The proportion is much lower in Tolworth, where only 56% of traders have been in business for more than 10 years. Tolworth has a significantly higher proportion of traders who have traded for a relatively short time period, indicating perhaps that traders are less able/inclined to remain trading in Tolworth for the longer term.

*Trading Performance*

- 5.50 Respondents were asked whether their turnover had changed over the last 12 months and the results are shown in **Table 5.4** and illustrated in **Figure 5.3** below.

Figure 5.3: Change in turnover in the last 12 months

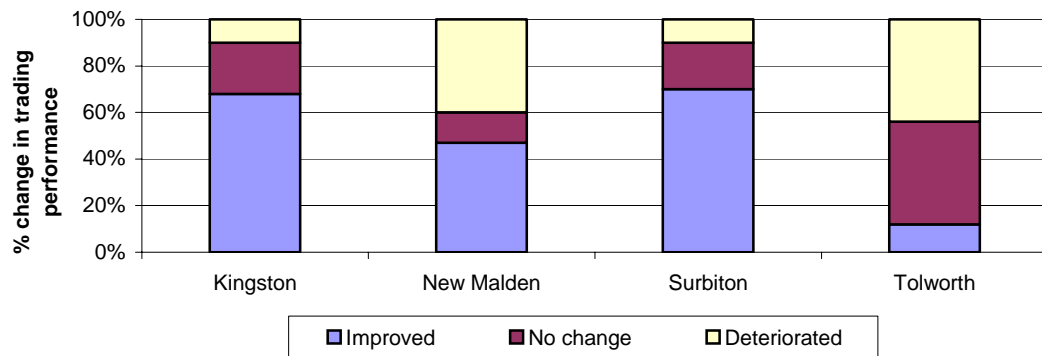


- 5.51 New Malden has the largest proportion (approximately 50%) of traders that consider turnover to have improved over the past twelve months. This proportion is on a par with traders in Kingston town centre. Only a third of traders in Surbiton and Tolworth have experienced improved trading conditions. In terms of decreasing trade, New Malden again is on a par with Kingston town centre with only 18% of businesses experiencing a decrease. Surbiton has the largest proportion of traders (just over a quarter) that have experienced a decrease in trade.

#### *Town Centre Performance*

- 5.52 Respondents were asked to rank the three key strengths and the three key weaknesses of each centre. As for the analysis of Kingston town centre, in order to analyse the results we have applied a weighting system, whereby respondents first choices are weighted highest (allotted a score of 3), the second choices are weighted second (score 2) and third choice receive a weighting score of 1. The weighted scores are set out in Tables 5.6 and 5.7.
- 5.53 **Table 5.6** highlights the importance of ease of access and the public transport links to each of the centres. These strengths are especially important in Surbiton (accounting for half of all strengths) where the rail connection and quality of the bus services in proximity to the shopping streets is a major plus point. New Malden and Surbiton also score well in terms of the range of shops, and in both centres it is to be expected that the range and quality of the convenience provision in particular will have contributed to the relatively high scores. The principal strength in Tolworth is considered to be the public transport links, after which the availability of car parking and parking pricing (all car parks are free for short-term parking in Tolworth) score well and considerably higher than all the other centres.
- 5.54 **Table 5.7** identifies the lack of car parking in New Malden and Surbiton as the key weaknesses, in addition to which the cost of parking is a further weakness. The overall quality of the shopping in New Malden and Surbiton is also identified as a weakness. Surbiton is identified as being particularly weak in terms of the range of shops, which contradicts the responses to the previous question, but is likely to reflect the short-fall of comparison goods stores and the high proportion of charity, second-hand and discount shops in the town centre that dilute the quality of the comparison goods offer. In Tolworth the key weaknesses are perceived to be the range and quality of the shopping coupled with the availability of car parking (which was also identified as a strength).
- 5.55 The respondents were asked how the trading performance of the centres had, in their view, changed over the last five years and the results are set out in **Table 5.8** and are illustrated in **Figure 5.4** below.

Figure 5.4: Trading performance of the three centres over the last five years



- 5.56 There are considerable differences between the perceptions of the three sets of traders on the performance of each of the town centres over the past five years. The proportion of traders in New Malden that consider trading conditions to have improved over the last five years is matched by those that consider trading to have deteriorated. Surbiton traders are much more bullish, with over two-thirds considering conditions to have improved. The situation in Tolworth is the least favourable with 90% of traders considering trading conditions to have deteriorated, or at best remained unchanged.
- 5.57 The businesses surveyed were asked what factors, if any, would improve the town centres in which they trade, and the results are shown in **Table 5.10**. Across the centres there are three factors that were much the commonest response. These were:
- the provision of more parking;
  - the provision of a better range of shops; and
  - an improvement in the cleanliness of the streets.
- 5.58 The provision of more parking is the key issue in both New Malden and Surbiton although the other two issues mentioned above also scored particularly well. In Surbiton it is likely that the close proximity to Kingston town centre has contributed to the preponderance of charity, second-hand and discount stores, which together with the high proportion of restaurants are the key limiting factors to the provision of a good range of shops. In Tolworth the provision of a better range of shops and improvements in street cleanliness were the over-riding factors, but the provision of more car parking also scored highly. By way of comparison Kingston traders also majored on the need for more parking and for improved street cleanliness, but as would be expected, unlike traders in the three district centres, Kingston traders do not consider improvement in the range of shops to be important.
- 5.59 Other factors of note are that in Surbiton a significant proportion consider that the pedestrian environment needs improving and a number of New Malden traders consider that pedestrianising the High Street would improve the town centre. Whilst the latter suggestion may offer little prospect given the strategic importance of the High Street in the local road network, it does indicate the importance traders place on developing a conducive shopping environment.

### *Transport*

- 5.60 Respondents were asked to identify the most common mode of transport used by their employees to get to work. The results are presented in **Table 11**. In each centre the car was by far the most common mode, accounting for around three quarters of businesses in Surbiton and Tolworth and almost 90% of New Malden businesses. Approximately a quarter of all Tolworth businesses indicate that the bus is the most common mode for employees to travel to work, and in Surbiton a similar proportion walk to work. However, the proportions using the car in all the district centres are very high.

The figures are approximately twice those of businesses in Kingston town centre where, in common with the district centres, the availability of parking spaces is at a premium, but there is one important difference, the car parking pricing policies in Kingston town centre discourage long-term non-shopper parking.

- 5.61 The perception of a lack of sufficient car parking for shoppers is a common factor in all the centres, as referred to at paragraph 5.57 above. It is likely that the occupancy of town centre parking spaces in all three district centres by employees for the full working day substantially reduces the amount of short-term parking spaces available for shoppers. Better management of the existing spaces coupled with the promotion of the public transport linkages would help provide more short-term shopper car parking.
- 5.62 Respondents were asked to identify the mode of transport used and the frequency of deliveries. The results are presented in **Tables 5.12 and 5.13**. In all three centres the vast majority of deliveries are made by van or small lorry, which is similar to the situation in Kingston town centre. Unsurprisingly the businesses in the district centres tend to be smaller than in Kingston town centre (see **Table 5.2**), the proportion of large lorries used for deliveries is much lower compared to Kingston.
- 5.63 Again, with the frequency of deliveries, there are marked similarities between the three district centres. The vast majority of deliveries take place weekly or more regularly. The number of daily deliveries is almost zero and there are relatively few deliveries at less than a weekly frequency.

### Key Messages

- 5.64 Below we draw out the key messages highlighted through the surveys for each of the centres.

#### *Kingston*

- Traders/businesses are generally performing well (in as much as trade has improved over the past 12 months) and this is not simply confined to businesses trading in the primary frontages. However, the main anchor stores have experienced static turnover and profit growth over the past 18 months/two years. These stores are fundamental to the success of Kingston town centre as they are the key attractors, and it follows that difficult trading conditions in these stores will eventually feed through to the town centre as a whole.
- The range and quality of the shops and the public transport links are the key strengths of Kingston town centre.
- The accessibility problems, the cost and lack of sufficient car parking in Kingston are the main weaknesses. Dealing with the problems of poor accessibility and the availability of car parking are fundamental to the continued success of Kingston town centre.
- The majority of the traders/businesses consider that Kingston town centre has improved over the past five years.
- In approximately 50% of businesses public transport is the main mode used by staff to get to work.
- There is strong retailer demand for representation in Kingston town centre. Retailers not currently represented in Kingston town centre are keen (and a high proportion are extremely keen) to gain representation.
- Over half of all businesses searching for premises have been looking for more than a year. The main constraint prospective traders in Kingston encounter is the lack of appropriately sized property. Insufficient units of the right size coupled with the high rents are much more important limitations to the search for premises than locational issues.

### *New Malden*

- Traders/businesses in New Malden are overall performing better than in Surbiton or Tolworth and are on a par with Kingston (as measured by change in turnover performance over the past 12 months).
- The quality of the public transport links, the ease of access to the centre for shoppers and the range of shops are seen as the key strengths.
- The lack of sufficient car parking, the cost of parking and the quality of the shopping are perceived to be the key weaknesses.
- New Malden is perceived by equal proportions of traders to have improved/deteriorated over the past five years.
- The principle factor that would improve the town centre is perceived to be an increase in the provision of shopper car parking.
- The car is by far the principal mode of transport used to get to work.

### *Surbiton*

- Trading conditions in Surbiton are not as positive as conditions in Kingston or New Malden. Only a third of respondents have experienced growth in turnover over the past 12 months, while over a quarter have experienced a deterioration.
- The key strengths are the quality of the public transport links, the ease of access to the centre and the range of shops (specifically the convenience provision).
- The key weaknesses are the range of shops (specifically the comparison offer), the lack of sufficient car parking, the pricing of the parking and the quality of shops (we note the high proportion of charity, second-hand and discount shops).
- The key changes that would improve Surbiton town centre are the provision of more car parking, improved street cleanliness and the provision of a better range of shops.
- Although the quality of the public transport links to Surbiton town centre are acknowledged to be good, for the majority of businesses the car is the most common mode of transport used to get to work.

### *Tolworth*

- Although no traders report a decrease in trade over the past 12 months, only a third report an improvement compared to over half in New Malden and Kingston.
- The key strengths of Tolworth are the quality of the public transport links and the freely available car parking.
- The key weaknesses are perceived to be the limited range of shops, the availability car parking (balanced by the identification of this factor as a strength) and the poor quality of the shopping.
- The vast majority of traders consider that the performance of Tolworth town centre has deteriorated, or at best experienced no change, over the last five years.
- In common with the other two district centres, although the quality of the public transport links are acknowledged to be good, the car is the most frequently used mode of transport used to get to work.

## 6 RETAIL PROPERTY MARKET ASSESSMENT

- 6.1 In addition to the survey work referred to in the earlier sections of this report, the study has also addressed the two key retail property market issues - rental values and the availability of floorspace.
- 6.2 In respect of both rents and floorspace we have employed a two-fold assessment. Firstly, we review the macro position by comparing the Borough's centres with centres elsewhere using published data followed by the micro level through the assessment of patterns within each centre.
- 6.3 We have used published rental data from Colliers CRE<sup>9</sup> (published data is only available for Kingston and Surbiton) to establish the macro-position. The Colliers CRE data records prime Zone A rents for town centre retail property and is gathered on a consistent basis and is available over a time series dating back over 10 years. Thus it is possible to plot and assess change in rental profile over time and to compare relative performance.
- 6.4 We have assessed the micro-level situation (the pattern of rental profile change within each of the Borough centres), through discussion with a number of local commercial property agents. There is a high degree of consensus between the agents in respect of the rental values achieved in the various pitches in each of the Borough's centres, and the consensus views are illustrated on the maps at **Appendix 6** to this report.
- 6.5 We have assessed the quantum of retail floorspace within each of the Borough's centres compared with other Greater London centres considered to be similar in rank and scale to establish the degree of comparability and to draw out any noteworthy variations. We have used floorspace data from a recent Office of the Deputy Prime Minister's (ODPM) report<sup>10</sup>. Although there are short-comings with some of the town centre data included in the report, the floorspace data appears to be realistic and does allow for aggregate comparisons between centres.
- 6.6 For the micro level review of retail floorspace we have made an assessment of the floorspace supply factors, focusing on Kingston town centre only as this is the over-whelming focus for market demand.

### Rental Profile - Kingston Town Centre

#### *The macro position*

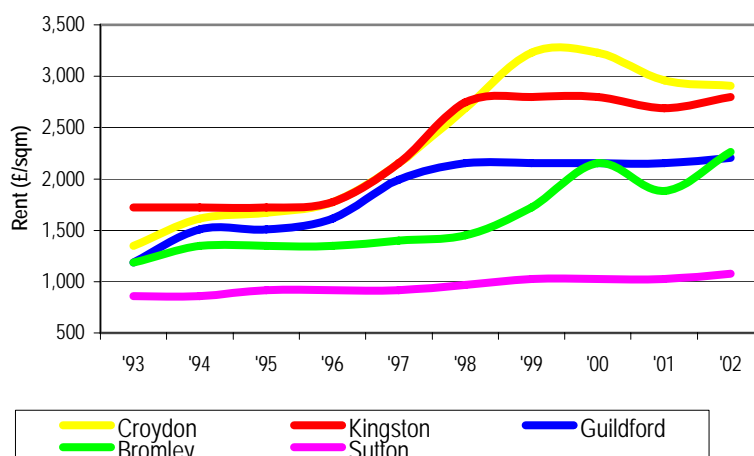
- 6.7 Figure 6.1 below compares prime rental values over the past decade in Kingston town centre with rents in the other south London Metropolitan centres Bromley, Croydon and Sutton and with the main centre in Surrey - Guildford.

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<sup>9</sup> Colliers CRE 'In Town Rental Report' 2002

<sup>10</sup> ODPM 'Producing Boundaries and Statistics for Town Centres', July 2002

Figure 6.1: Prime Zone A Retail Property Rentals (1993 – 2002)



Source: Colliers CRE In Town Rental Report, 2002

6.8 Figure 6.1 demonstrates:

- Rental growth over the period in Croydon and Kingston exhibits close parallels. After the static growth of the early 1990s both centres have experienced significant rental growth since the mid-1990s. This is likely to reflect a number of factors, but principally the improving macro-economic situation and the tightening of Government guidance in support of town centres through the issuing of revised planning guidance on town centres and retail development (PPG6) in 1996.
- Rents in Croydon continued to rise in the late 1990s compared to Kingston where rents have stabilized in the period since 1999, and rents in Croydon are currently marginally higher than prime Zone As in Kingston. Rental growth in Croydon is likely to reflect the improvements that have been made to shopping attractions and the much improved accessibility in recent years, these improvements include the refurbishments of the Whitgift Centre and the introduction of the Tramlink, which commentators believe has extended Croydon town centre's catchment area.
- Guildford has experienced steady if not spectacular rental growth over the last decade broadly in line with growth elsewhere.
- Bromley experienced accelerated growth in the late 1990s, while Sutton, much the weakest of all the centres, has experienced virtually no growth in rental values over the entire period.

#### *The micro position*

- 6.9 The rental profile map for Kingston town centre shows a wide variation in rental pitches, ranging from £2,700/sqm for prime property in the Bentall Centre and on Clarence Street to pitches achieving between £210/319/sqm in the weakest pitches in the centre, on London Road and on the High Street. This is a very broad range of rents within what is a concentrated and vibrant retail centre, and is a major contributory factor to explain how Kingston maintains such a diverse range of retail activity.
- 6.10 Beyond the prime pitch our analysis identifies a circuit of shopping streets (referred to as the shopping circuit) that all return very healthy rents (between £1,100/sqm and £2,149/sqm). The shopping circuit takes in Church Street (known as Kingston's Bond Street for reason that it is home to a concentration of ladies fashionwear outlets), the Eden Walk Shopping Centre and Eden Street that links back to the eastern end of Clarence Street to complete the shopping circuit. Beyond the streets on the shopping circuit rents are much lower especially in the streets in the direction of the railway station, in areas adjacent to, or beyond, the ring road (such as Richmond Road and London Road) and the areas to the

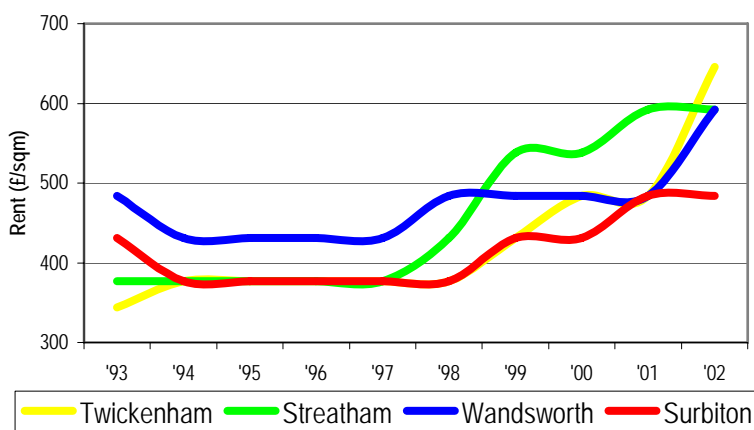
south and south-east of the main shopping circuit, which are furthest away from the main shopping attractions.

### Rental Profile - District Centres

#### *The macro position*

- 6.11 Figure 6.2 below compares prime rental values for Surbiton, the only one of the three district centres for which time series data is available, over the past decade with rents in other south-west London district centres.

Figure 6.2: Prime Zone A Retail Property Rentals (1993 –2002)



Source: Colliers CRE In-Town Rental Report, 2002

- 6.12 Figure 6.2 demonstrates:
- Rental growth in Surbiton and the other centres was static through the mid-1990s, but have risen in the more recent period. The improvements in Surbiton and the other centres are also likely to principally reflect improving macro-economic conditions and the tightening of Government guidance in support of town centres.
  - Rental growth in Surbiton has been much steadier than the other centres in the last three or four years. Some centres, notably Twickenham have experienced surging rental growth, whereas Surbiton's growth has been far less dramatic. Never-the-less there has been rental growth in Surbiton suggesting that the centre remains a centre attractive to retailers. This may principally be retailers that benefit from the quality of the convenience goods provision in the centre.

#### *The micro position*

- 6.13 The rental profile patterns in the district centres are unsurprisingly much less complex and have a much narrower range of values and a traditional linear form in comparison with Kingston town centre. Prime property in Surbiton achieves a maximum of £539/sqm, in New Malden the figure is £420/sqm and in Tolworth £319/sqm. Property in the weakest retail pitches in all the district centres currently returns rents of between £160 - 209/sqm.
- 6.14 In Surbiton prime rents (£539/sqm) are achieved on Victoria Road with the pitch between the railway station and St Andrews Road achieving the highest rents. The opening of the Waitrose store, in the former B&Q unit off Claremont Road, has been the catalyst for marginal improvements in rents on Claremont Road/St Marks Hill.

- 6.15 A similar pattern to Surbiton is found in New Malden, where top rents (£420/sqm) are achieved on the High Street in the area between Waitrose and Woolworths. Rents are a little weaker beyond this pitch and are weaker still beyond the railway station and Kingston Road.
- 6.16 Top rents in Tolworth (£319/sqm) are achieved on the western side of the Broadway in the section anchored by Iceland. Rents are a little weaker beyond this narrow pitch, and at a similar level on the one remaining retail parade on the eastern side of the Broadway.

## Retail Floorspace – Kingston town centre

### *The macro position*

- 6.17 Below, we tabulate the quantum of retail floorspace (A1, A2 and A3) in Kingston town centre compared to other Metropolitan centres considered to be of a broadly similar rank and scale.

**Figure 6.3: Retail Floorspace (sqm gross) by Use Class Category (Kingston and selected Metropolitan centres)**

Centre	A1		A2		A3		Total Retail	
	sqm	%	sqm	%	sqm	%	sqm	%
Croydon	258,414	89	15,186	5	16,877	6	290,477	100
Kingston	208,726	91	9,820	4	10,551	5	229,097	100
Bromley	164,424	90	10,161	6	8,789	5	183,374	100
Sutton	134,127	92	6,604	5	4,544	3	145,275	100

Source: ODPM, 'Producing Boundaries and Statistics for Town Centres' July 2002

- 6.18 **Figure 6.3** demonstrates:
- There is little variation between the four Metropolitan centres in terms of the proportions of floorspace in the various retail use classes. On average 90% of the retail floorspace in Metropolitan centres is occupied by shops (A1).
  - Kingston currently has 20% (some 50,000sqm) less shop (A1) floorspace than Croydon and approximately a third less A2 and A3 floorspace.
- 6.19 Of the centres identified in the above table Croydon is the only centre that is under-going and planning a major expansion of its retail floorspace. A major extension of 39,500 sqm gross floorspace to the Drummond Centre, which will be renamed Centrale, is currently nearing completion. Centrale will be anchored by a new 15,000 sqm gross House of Frazer department store and the scheme will result in an increase in retail floorspace in Croydon of 25,000 sqm gross.
- 6.20 There are also rival plans currently at the planning stage for further retail floorspace expansion in Croydon town centre. The Council has resolved to grant planning permission for developer Minerva's 93,000sqm gross Park Place scheme on the site of the existing Alders department store in the town centre. Approximately half the Park Place scheme would be replacement floorspace. The rival scheme, promoted by the owners of the Whitgift Centre, Aberdeen Property Investors, seeks permission for a 46,500 sqm gross extension to the Whitgift Centre. The two schemes cover overlapping sites and are currently being considered by Government Office for London.
- 6.21 Together Centrale and either the Park Place or Whitgift extension will add approximately 70,000 sqm gross of new retail floorspace to Croydon town centre taking the total A1 figure to approximately 330,000 sqm gross, a 25% increase on current levels. In the longer-term further retail expansion could be provided at the Croydon Gateway site.

- 6.22 These developments will bring much needed good quality modern floorspace of the right size and configuration to the market allowing traders already represented to relocate and also permit new traders to enter the Croydon market. Croydon is one of the few major shopping destinations not to have a Gap store and traders such as Next and H&M that are represented are known to occupy units too small for their current requirements.
- 6.23 A further benefit provided by the development of substantial new retail floorspace will be the opportunities this brings to release the existing older stock in Croydon town centre for redevelopment.
- 6.24 Elsewhere centres such as Guildford and Camberley have substantial additions to the retail floorspace planned that will be capable of accommodating the large space occupiers. In Guildford the proposed refurbishment and extension to the Friary Centre will provide 70 new shop units, a new bus interchange, restaurants and bars and this combined with the quality of the existing provision will ensure that Guildford consolidates its role as the dominant shopping location in Surrey.

*The micro position*

- 6.25 The figures supplied by RBK for Kingston town centre indicate that the centre enjoys very low vacancy rates. In the prime shopping area only 3% of retail floorspace is vacant and only 5% of retail floorspace overall is vacant. These levels of vacancy compare favourably with the South-east average of 9%<sup>11</sup>.
- 6.26 A contributory factor to the low vacancy rates is that comparatively little floorspace is on the market and available at any point in time, and what available space there is generates considerable interest from retailers and tends to remain vacant for relatively short periods of time.
- 6.27 We have previously referred to the considerable retailer demand for representation in Kingston town centre. The schedule presented at **Appendix 6**<sup>12</sup> sets out the retailers that have expressed an interest in gaining representation in Kingston town centre. There are currently 70 retailers seeking representation in Kingston, which is a higher level of demand than for Croydon (55 retailers), but less than the 95 requirements for Guildford. The lower level of demand in Croydon is less a reflection of the attraction of the centre and more a reflection of the fact that many more retailers are already trading in the centre than are currently trading in Kingston, and therefore Kingston is on the store location lists of more retailers. The healthy demand for space in Guildford reflects the view held by retailers that Guildford is a very good trading location.
- 6.28 What demand there is for representation in Croydon is likely to be substantially satisfied by the developments coming on stream and those currently in the pipeline, which as referred to above will provide significant additional floorspace of the modern size requirements of retailers.
- 6.29 In respect of Kingston town centre the market view is that there is not enough retail floorspace in any unit size band, but that space is particularly under-provided for in the type of units favoured by the fashion wear traders. Traders such as Zara, Mango and Uniqlo, none of whom are currently represented in the town, require units in the region of 370 sqm – 560 sqm (4,000 – 6,000 sqft). Some of the big fashion multiples such as Gap and New Look seek units of 930 sqm – 1,900 sqm (10,000 – 20,000 sqft). Traders such as the fashion wear multiples are important attractions in retail centres and are key drivers of the retail market. A failure to cater for the space requirements of the fashion wear retailers is likely to encourage these traders and shoppers to go elsewhere. It is relevant to note that Bluewater has a significantly larger provision of fashion wear traders than are represented in Kingston town centre, including the first two of the three retailers referred to above.

<sup>11</sup> Experian Goad figure for all centres in the South-east

<sup>12</sup> Schedule generated from the Estates Gazette Interactive - Retailer Requirements database

## Retail Floorspace – The District Centres

### *The macro position*

- 6.30 Figure 6.4 below compares the quantum of retail floorspace in the three district centres with that of other similarly sized London district centres.

Figure 6.4: Retail Floorspace (sqm gross) by Use Class Category (selected centres)

Centre	A1		A2		A3		Total Retail	
	sqm	%	sqm	%	sqm	%	sqm	%
Streatham	34,822	78	5,755	13	3,946	9	44,523	100
Wandsworth	37,797	88	3,134	7	2,182	5	43,113	100
<b>New Malden</b>	<b>26,904</b>	<b>84</b>	<b>2,700</b>	<b>8</b>	<b>2,431</b>	<b>8</b>	<b>32,035</b>	<b>100</b>
Twickenham	21,392	71	4,704	16	3,894	13	29,990	100
Beckenham	21,597	80	2,811	10	2,695	10	27,103	100
Balham	20,526	79	3,571	14	1,966	8	26,063	100
<b>Surbiton</b>	<b>15,640</b>	<b>71</b>	<b>3,679</b>	<b>16</b>	<b>2,805</b>	<b>13</b>	<b>22,124</b>	<b>100</b>
Morden	15,912	79	2,183	11	2,041	10	20,136	100
Teddington	15,104	79	2,085	11	1,864	10	19,053	100
East Sheen	14,422	83	1,854	11	1,016	6	17,292	100
<b>Tolworth</b>	<b>13,934</b>	<b>82</b>	<b>1,669</b>	<b>10</b>	<b>1,339</b>	<b>8</b>	<b>16,942</b>	<b>100</b>
<b>Average</b>	<b>21,641</b>	<b>79</b>	<b>3,104</b>	<b>12</b>	<b>2,380</b>	<b>9</b>	<b>27,125</b>	<b>100</b>

Source: ODPM, 'Producing Boundaries and Statistics for Town Centres' July 2002

- 6.31 Figure 6.4 demonstrates:

- New Malden and Tolworth have marginally higher proportions of A1 floorspace than the average for all the comparable centres and consequently marginally lower than average proportions of A2 and A3 floorspace. However, on balance the proportions of retail floorspace in these centres varies little from the other centres.
- Surbiton has a significantly lower proportion of A1 floorspace than the average, which is counter-balanced by higher proportions of A2 and A3. The only other centre to exhibit a similar, indeed identical profile is Twickenham.

- 6.32 Surbiton's location within a mile of Kingston town centre, and Twickenham's location sandwiched between Kingston and Hounslow, two much larger Metropolitan shopping centres, is the major determining factor contributing to the limited proportion of A1 (shop) floorspace in Surbiton and Twickenham. In our view it is highly likely that the main area of A1 floorspace under-provision will be the proportion of comparison goods retail floorspace, rather than the proportion of convenience<sup>13</sup>. This is because comparison goods retailers will be less inclined to locate in a district centre if there is opportunity to locate within a major Metropolitan centre, even if rents prohibit anything other than a marginal location.

## Key Messages

- 6.33 Below we draw out the key messages highlighted through the rental and floorspace surveys for each of the centres.

<sup>13</sup> ODPM figures only provide the A1 figure and do not split comparison and convenience

*Kingston*

- Kingston town centre is an attractive centre for retailers who are prepared to pay high rents.
- There is a wide divergence in rental pitches in the centre ranging from £2,700/sqm to £210/sqm, which reflects the number of diverse areas within the centre and contributes to the wide range of traders in the town.
- The main shopping circuit is relatively well defined, but weakest at the southeast corner.
- Kingston has 50,000 sqm less A1 floorspace (and indeed less A2 and A3) than Croydon, but more than Bromley and Sutton.
- Croydon and centres to the southwest of Kingston (Guildford and Camberley) are expanding and refurbishing their retail floorspace.
- Vacancy in Kingston is very low, approximately half the average for southeast centres. Combined with a high retailer demand for representation the low vacancy rate indicates the popularity of the centre and a supply-side shortfall.
- The key areas of under-supply are for units of 370 – 560 sqm.

*District Centres*

- The linear built form of each of the district centres means that their rental profile is much less complex than Kingston town centre.
- New Malden and Surbiton have more prime retailing and the decline in rental values away from the prime area is less pronounced than in Tolworth.
- In Surbiton rental growth has been weaker than in similar district centres, which suggests that the demand for representation in the centre is relatively weak.
- Surbiton has less A1 floorspace than comparison with other district centres would indicate that it should have.
- New Malden and Tolworth have an above average quantum of A1 floorspace.

## 7 POLICY ISSUES

7.1 The preceding sections have reported on all the survey work that has been undertaken in the course of this study, and drawn out the key messages in respect of each. We now turn in this section to assimilate the key messages to identify the key policy issues in respect of Kingston town centre and the three district centres.

### Kingston Town Centre

7.2 The findings of the surveys of residents, shoppers and retailers demonstrate that there is a general level of satisfaction with the current performance of Kingston town centre as a shopping destination. However, the surveys underline that there is no room for complacency and that there are significant areas where improvement can be made. Our work has also identified the warning signs that after a decade of steady growth Kingston may be starting to lose market share.

7.3 To consolidate Kingston's position as South-west London's principal Metropolitan centre Kingston needs to maintain its competitiveness and retain its attraction to ensure shoppers and visitors are drawn in sufficient numbers and for extended visits to maintain profitability. Retailing is an ever changing and intensely competitive industry and town centres compete with one another for a share of the market. Maintaining market share is critical to the continued profitability of businesses and the town centre as a whole.

7.4 To ensure that Kingston town centre retains its attraction and maintains its market share there are a number of policy issues that need to be addressed. These are:

- the need to accommodate additional retail floorspace (through both new build and intensification/upgrade of the existing stock);
- the need to improve accessibility to the town centre by all modes of transport;
- the need to alleviate car parking problems;
- the need to promote linkages between shopping and leisure activity; and
- the need to improve the shopping environment.

7.5 Below, we address each of these policy issues starting with the need to accommodate additional retail floorspace.

#### *The need to accommodate additional retail floorspace*

7.6 There has been no significant new retail development in Kingston town centre since the completion of the Bentall Centre in 1992. In the ensuing decade the centres that compete with Kingston within Greater London and beyond have moved forward with new shopping developments and schemes in the pipeline that provide the size and configuration of space to accommodate modern retailing requirements.

7.7 Our surveys have identified that there is a supply-side space shortage in Kingston town centre and a clear demand for the larger store formats favoured by the fashionwear multiples, which are the key drivers in the retail sector. Bluewater, Croydon and Guildford all have new modern floorspace, or plan to introduce such to accommodate these types of trader. Retailer demand for representation in Kingston town centre remains at a high level and traders are on the whole less concerned by location, but rather by the size of the unit and the rent. Naturally, some retailers remain locationally sensitive and some locations fail to attract tenants for a variety of reasons. The units at the rear of the Bentalls Centre are in such a location that they fail to attract tenants of the calibre expected. What is needed in Kingston therefore to keep pace with demand is more retail floorspace, particularly large units of over 370sqm.

- 7.8 A failure to meet traders' requirements in Kingston town centre means that retailers and shoppers will go elsewhere, shrinking Kingston's market share and providing no growth, leading to declining turnover for the stores and the centre as a whole. There is already evidence that over the past two years turnover and visitor numbers have reached a plateau, which emphasises the need for Kingston to strengthen its retail offer to maintain its position.
- 7.9 On the basis of maintaining current market shares, and due to continued retail expenditure growth forecasts, Kingston town centre could accommodate significant growth in retail floorspace. Growth in retail floorspace would allow for modern large retail units to be accommodated, allowing those retailers already represented in the town centre, but occupying units too small for their needs, to relocate to units that meet their space requirements. New floorspace and relocations would also allow new and expanding retailers to enter the Kingston market. Permitting the traders to relocate within the town centre would in turn potentially allow for the redevelopment of the vacated space. We note that Clarence Street contains a number of shop units that do not meet modern requirements, indeed where these are grouped there may be opportunity for a more comprehensive redevelopment.
- 7.10 The constrained nature of the town centre means that within the ring road there are very few sites capable of accommodating significant new retail development. There are sites that could be redeveloped, such as the two urban blocks to the north of Clarence Street and separated by Castle Street and the block south of Clarence Street containing Eden Walk. Additionally Crown Arcade could be made to work better. However, none of these sites would lead to a sufficient net increase in retail floorspace to fully address the challenge. However, the scope for intensification and more efficient floorspace development should be investigated.
- 7.11 The one undeveloped site that offers the potential to accommodate a significant net increase in retail floorspace, and could also provide the opportunity for a mix of other uses, is the Ashdown Road site (Site PS22). Retail-led development on this site would provide a major shopping attraction at the weakest point in the existing shopping circuit, thereby reinforcing the circuit and providing for the needs of both retailers and shoppers.
- 7.12 We consider that a retail-led scheme for some 25,000 sqm gross retail floorspace could be accommodated (most likely on two levels) on the northern-most part of the site and this would be attractive to retailers and developers. The rest of the site would potentially be suitable for leisure (A3 and D1) uses incorporating the red brick listed former Post Office and Telephone Exchange buildings and there would also be opportunity to provide much needed public open space for shoppers, workers and other visitors to meet and relax. By satisfying the space requirements of the fashionwear traders, along with providing leisure uses and public open space the development would be complementary to the existing provision in the town centre.
- 7.13 Such a scheme would help maintain a level of attraction commensurate with the centres with which Kingston competes and in our view would be unlikely to generate significant numbers of additional shopper trips to Kingston. Rather it would reinforce the existing town centre by improving the offer to the existing shoppers, encouraging them to stay longer and spend more. A development of the scale envisaged would not affect the Borough's district centres or indeed district centres elsewhere, because as we have shown in the earlier sections of this report the latter perform a quite different shopping function and serve a much more localised catchment principally for convenience goods needs.
- 7.14 There would be a number of difficulties in terms of integrating the Ashdown Road site into Kingston's shopping circuit, such as the orientation of Eden Walk, which presents a blank façade to the site (particularly the BhS unit), and also implications for car parking availability within the town centre as the site currently provides 161 car parking spaces. Eden Street is also the main bus route into the town centre and shoppers accessing Ashdown Road would need to cross Eden Street. These matters are not insurmountable, however.

*The need to improve accessibility*

- 7.15 The congestion problems associated with accessing Kingston town centre were clearly highlighted by the surveys. Access into Kingston town centre is problematic by both public and private transport modes.
- 7.16 The routes in to Kingston town centre by car are often severely congested at peak times and there is clear evidence that the levels of congestion are capping visitor numbers. There is certainly a need for action and the introduction of park and ride would undoubtedly help to improve the situation. Park and ride may not be attractive to all shoppers (especially shoppers making short-trips), but it may be an option that is attractive to long stay visitors and, importantly, the town centre workforce.
- 7.17 Whilst the bus services into Kingston town centre are well used (the vast majority of the 27% of all households that use public transport use buses) the arrival points and linkages into the shopping areas are poor. Trains are used much less frequently for shopping trips, due in our view to the network routing, but we consider that the quality of the public realm at the station and the linkages with the shopping core to be poor. The need for improvement of the linkages between the public transport facilities and the retail core in the shopping environment is considered in more detail in the section that deals with shopping environment improvements below.
- 7.18 A specific area that the study brief required the consultants to assess was the accessibility of the town centre from the new Sainsbury store on Richmond Road. The clear message from the survey is that trip linkages between the town centre and the Sainsbury store are much more prevalent by non-car borne shoppers than they are by car-borne. At the time of the survey (March 2002) the parking tariff was seen to be effective at discouraging the car-borne shopper, with a high proportion of non-car borne shoppers (40%) using the store (we would have expected 20-25% of shoppers to have been non-car borne). Shortly after the survey the parking charge tariffs were changed.

*The need to alleviate parking problems*

- 7.19 The surveys highlighted the general dissatisfaction with the availability and cost of car parking in Kingston town centre. In our view the supply of car parking spaces (numbering some 7,000) is perfectly adequate for a centre the size of Kingston town centre (230,000 sqm of retail floorspace). There may be scope for better management of the existing spaces through improved information for drivers, and we understand that further work is being commissioned on town centre parking issues.

*The need to promote linkages between shopping and leisure activity*

- 7.20 The survey results indicated a disappointing amount of interplay between shopping and leisure activity in Kingston town centre. Whilst evidence suggests that this is part of a national trend<sup>14</sup>, it is our view that Kingston town centre is failing to make the most of the quite exceptional non-shopping facilities provided in particular by the River frontage and the Charter Quay development. Improved signage and other promotional material could help to achieve stronger linkages.
- 7.21 An important factor determining what town centre facilities are visited by the one-off, infrequent or even the regular visitor is the information and signage provided. Even in the case of the regular visitor it is important to update their knowledge of the available facilities. Such information is especially important at the arrival points where the information should be made as clear as possible. In our view the signage to the shopping facilities, the River and the other leisure facilities in the town are poor and should be improved.

*The need for improvements to the shopping environment*


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<sup>14</sup> LGA report 'All day and all of the night', January 2002

- 7.22 The need to address short-comings in the shopping environment was a clear message from the surveys. The surveys were not able to go into great detail in respect of which areas/aspects are particularly in need of improvement, but below we identify a number of areas that we consider need enhancing to bring forward significant improvements to the shopping environment in Kingston town centre. We also deal with the need for improved street cleaning, which was identified in the surveys.
- 7.23 The principal areas of the public realm requiring improvement are the public transport arrival points (bus and train stations) and the linkages between the arrival points and the shopping facilities, the Market Place and the other shopping streets more generally. Both the bus and rail stations are located on the opposite side of the ring road from the shopping facilities and have no visual linkages with the town centre - this is a key weakness, but even when the visitor has negotiated the road barrier the public realm on the inner side of the ring is far from welcoming.
- 7.24 The visitor approaching the town centre from the railway station, having negotiated the ring road is then faced first by a blank flank wall, other uninspiring buildings/shop fronts and the cluttered street scene on Fife Road that is dominated by cars and buses and is not pedestrian friendly. Improvements have been very recently made to the station forecourt in parallel with the new Rotunda leisure development, but these improvements are in the direction of the Rotunda and not towards the town centre. A long term and radical solution to improve the linkages between the railway station and the town centre would be to provide a covered pedestrian bridge link over the ring road and into a development on the southern side, in a similar format to the existing bridge linking the Bentalls car park with the shopping centre. There would be significant problems with such an undertaking not least the difference in levels and the high costs of such projects. However, the trigger for such a development could be a major upgrade of the station with associated development on land to the side and in front of the present station building.
- 7.25 Similarly visitors accessing the town centre from the Fairfield bus station are required to negotiate very uninspiring shop facades and the drab backs of other buildings.
- 7.26 All the access point / town centre linkage short-comings referred to above would be best considered in detail through a local area study focusing on the railway station /Fife Road and the links from the Fairfield bus station.
- 7.27 The Market Place is the largest public open space in Kingston town centre and the setting, provided by the attractive buildings that form the enclosure, makes for a very attractive space. However, the Market Place could work a whole lot better by day and by night, and could become a major attraction in the town encouraging shoppers and visitors to spend more time (and money) in Kingston. The principal detractor from the overall quality of the space is the roadway and the associated traffic management tools as these present major restrictions on the free flow of pedestrian movement. Some vehicular access is undoubtedly necessary to service the market stalls, the shops and to allow for services such as street cleansing, but the present arrangements in our view are far too restrictive on pedestrian movement.
- 7.28 Re-thinking the space allocated for vehicles in the Market Place would potentially allow a more pedestrian-friendly environment to be developed in which the cafe bars and restaurants could provide tables adjacent to their premises rather than in the rather unsatisfactory way the outdoor seating is arranged at the present time. The space allocation for the market traders could also be re-thought to avoid the waste of large amounts of space as we believe to be the case at the present time. If parking in the evening in the Market Place is considered to be a pre-requisite, and it is undoubtedly true that this would enliven what could otherwise be a rather empty space, this may be better organised in the middle of the Market Place rather than around the edges as presently arranged.
- 7.29 Most successful public spaces work from the edges (i.e. the buildings where activity is generated) inwards and this is an issue that needs addressing in the case of the Market Place. We recognise that there is a lot of activity to accommodate in what is a fairly confined space, but the present arrangements are in our view failing to make the most of what is a very attractive public open space. This can be

seen on the few occasions at “festivals” or bank holidays when Market Place is turned over to pedestrian only access and street entertainment.

- 7.30 Castle Street could potentially provide an attractive shopping/leisure street in a traffic free environment. We are aware of, and support, the Council’s plans to pedestrianise the street, although the street’s orientation is not the most favourable in terms of providing a sunny aspect in the afternoons. Removal of the traffic and clutter will make for a much more convivial shopping and leisure environment. Observation indicates that the short-term car parking on Fife Road and Castle Street encourages drivers to circulate in the area in the search for a parking space, in the course of which they generate many unnecessary traffic movements. Castle Street already contains a number of A3 uses that could spill out into the space vacated by vehicles and the roadway to provide a cosmopolitan atmosphere that would also help to consolidate the existing A3 uses on Fife Road.
- 7.31 The surveys highlight the need to improve the quality of the street cleaning in the town centre. Eden Street, in the vicinity of the fast-food outlets and bus stops, is a particular problem area, but litter and the street cleaner’s major curse, chewing gum, is prevalent elsewhere in the town centre. Allied to the need to improve the quality of the street cleaning is the issue of the quality of the street paving materials. In many places, even where litter collection is effective, the paving has not stood up to the ravages of time particularly well and appears grimy, stained and generally in poor condition. In some locations the paving has been insensitively repaired with materials such as tarmac that do not blend with the original paving materials and that detracts from the overall street scene. The poor quality of the paving in the town centre shopping streets is in sharp contrast with the high quality and upkeep of the paving materials inside the Bentall Shopping Centre.
- 7.32 In summary, for Kingston town centre to retain its current market share and in accordance with the centre’s role as a Metropolitan centre, there is a need to address all the key issues referred to above. Some issues can be addressed sooner than others and we refer to the timing of the developments and interventions in the final section of this report.

### **New Malden District Centre**

- 7.33 New Malden is functioning successfully. The centre benefits from having good quality town centre anchor foodstores and a good representation of multiple traders that together provide a centre able to meet most of the day-to-day requirements of the local population. The key issues from the surveys for New Malden are that although the centre is performing reasonably well, there is insufficient provision of short-stay shopper car parking and there is also room for some improvement in the shopping environment.

#### *The need for more short-stay shopper car parking*

- 7.34 The surveys indicate that significant numbers of shop workers travel by car and park all day in the centre. This pattern is likely to be replicated by other workers in the centre. The net result is insufficient car parking availability for short-stay shopper parking. Changes to the management of the existing car parking availability through limiting the amount of long-stay, and making more parking available for short-stay usage, would help improve the attraction of the shopping centre.

#### *The need for improvements to the shopping environment*

- 7.35 Overall we consider that the shopping environment in New Malden is reasonable. The pavements are wide and the soft landscaping is generally good. However, improvements could be made, particularly the linkage between the centre and the railway station. The public realm in the vicinity of the railway station is particularly unwelcoming and does not contribute positively to the visitor’s perception of New Malden and is likely to be a factor why only 2% of shoppers access New Malden centre by train.

### Surbiton District Centre

- 7.36 Surbiton is increasingly reliant, in retail attraction terms, on its convenience goods retailing provision, which is very strong and reflects Surbiton's primary role as a local convenience goods centre. The centre has developed a specialist function for providing high quality convenience goods stores and a large number of bars and restaurants. The comparison goods offer is weak and focuses on the day-to-day comparison goods provision (such as toiletries) rather than true comparison goods shopping (clothes and shoes). The weakness of the comparison goods offer is demonstrated by the high number of charity, discount or second-hand goods outlets, which indicates weak demand for representation and serves to further dilute the retail attraction. Our research indicates that retailers are more likely to take a unit in a weak pitch in Kingston town centre rather than trade in Surbiton. The large number of A3 outlets brings benefits for the evening economy, but serves to weaken the retail attraction by day.
- 7.37 The key issue for Surbiton is therefore how to limit the further loss of A1 uses.

#### *Limit further loss of A1 use*

- 7.38 It will be important to resist the further loss of A1 uses in Surbiton, especially on Victoria Road, as further loss would be likely to weaken the attraction of the centre for even the day-to-day comparison goods operators and seriously erode the ability of the centre to provide a sufficient range of shopping attractions for the local population.

### Tolworth District Centre

- 7.39 Tolworth is the weakest performing of all the district centres and has always experienced difficulties as a result of the physical barrier to the freeflow of pedestrian movement across the Broadway. Tolworth effectively operates as two centres – the more vibrant western side anchored by Budgens, Boots and Iceland and the eastern side anchored by Marks & Spencer. The key issue is how to deal with the physical separation of the retailing offer on the two sides of the Broadway, and we understand that Taskforce Tolworth<sup>15</sup> will address this issue. We consider that opportunities to improve the physical linkages across the Broadway are very limited and that the local community may be best served by building on the centre's strengths, which from a retailing perspective are the Marks and Spencer's foodhall on the eastern side, which essentially acts as a one-stop shopping location, and the car parking pull-ins off the Broadway, better physical separation from the fast moving traffic and a greater concentration of shops and services on the western side of the Broadway.

#### *Concentrate Shopping provision on western side of Broadway*

- 7.40 The introduction of a major A3 use in the parade closest to the Marks & Spencer food hall on the eastern side of the Broadway, combined with the weakness of the retail provision on that side indicates that the encouragement of other leisure uses on the eastern side would be appropriate. This would in turn help to consolidate the retail activity on the western side, creating a more vibrant and attractive centre to the benefit of the local community.
- 7.41 Opportunities to consolidate the retail focus on the western side of the Broadway should be encouraged.

<sup>15</sup> Taskforce Tolworth is a group established by the Council in August 2002 to address environmental issues.

## 8 RECOMMENDATIONS FOR PLANNING FOR THE FUTURE

8.1 The final section of the report makes recommendations in respect of planning for the future retail strategies of Kingston town centre and the district centres in both the short to medium term (now and in the next two years) and over the medium to long term (beyond two years).

### Kingston Town Centre

#### *Short to Medium Term*

8.2 Additional retail floorspace-

- Examine the opportunity for net additional retail floorspace within the town centre through the upgrade/intensification of the existing floorspace stock.
- Open dialogue with all relevant parties to test the market in respect of a retail-led scheme on the Ashdown Road site.
- Rephrase UDP shopping policies to encourage new retail development in Kingston town centre, in order to consolidate its current position in the retail hierarchy and provide the improved quality that customers require.

8.3 Accessibility

- Proposals for park and ride scheme(s) should be worked up in detail for implementation in the short to medium term or early in the medium to long term.

8.4 Linkage promotion

- The quality of the signage and town centre information should be improved in the town centre and particularly at the arrival points (bus and rail stations and car parks), to aid both the infrequent and more regular visitor. This should particularly aim to promote the links between shopping and leisure.

8.5 Shopping environment improvements

- Street cleaning should be stepped up to include a more thorough cleansing of the paved areas to remove the grime and particularly the gum.
- Plans should be worked up to pedestrianise Castle Street.
- A strategy should be developed for improving the quality of the public realm at the public transport arrival points and the pedestrian routes linking the transport nodes with the shopping and leisure facilities in the town centre. This should be commenced by a local area study focusing on the railway station /Fife Road and the links from the Fairfield bus station.
- Plans should be worked up to improve the appearance and pedestrian circulation in the Market Place. These should focus on reducing the impact of vehicles, providing opportunities for A3 uses to provide seating areas that spill out into the space and making a more rational use of the space used by the market traders.

#### *Medium to Long Term*

8.6 Additional retail floorspace proposals

- Encouragement should be given to bring forward a major retail-led development on Ashdown Road to satisfy the demand and help maintain Kingston town centre's market share.
- Opportunities to intensify retail floorspace within the existing town centre blocks should be encouraged. However, such re-development would almost certainly be predicated on the availability of alternative floorspace arrangements elsewhere for the existing traders.

## 8.7 Accessibility

- Park and ride scheme(s) should be implemented.

## 8.8 Shopping environment improvements

- Improvements to the public transport arrival points and the pedestrian routes linking the transport nodes with the shopping facilities should be implemented.
- Castle Street should be fully pedestrianised.
- Plans to improve the public realm in the Market Place should be implemented.
- The existing street paving materials that have failed to cope with the ravages of time should be replaced by much higher quality materials.

## The District Centres

### *Short to Medium Term*

## 8.9 Additional retail floorspace proposals

- Other than incremental floorspace additions we do not consider there is a need for major additions of retail floorspace in any of the district centres.

## 8.10 Accessibility

- An assessment should be made of the opportunities to reduce the provision of long-term parking in **New Malden** and the provision of increased short-term shopper parking.

## 8.11 Change of use

- To ensure that a suitable range of shopping facilities remain available to local residents policies to help avoid the further loss of A1 uses from Victoria Street, **Surbiton** should be introduced.
- To assist the consolidation of the retail function on the western side of the Broadway, **Tolworth** change of use from A1 to A3 in the remaining shopping parade on the eastern side of the Broadway should be encouraged.

## 8.12 Shopping environment improvements

- In all three district centres, but particularly Tolworth, improvements in street cleaning are recommended.
- All of the district centres would also benefit from further public realm improvements. One particular location that would benefit from a strategy for improvement is the forecourt at **New Malden** railway station. Improvements here should concentrate on strengthening the pedestrian linkage between the arrival point and the shopping facilities, which should and could be much more welcoming and attractive.

### *Medium to Long Term*

## 8.13 We consider that all the issues in the district centres can and should be dealt with in the short to medium term.