urban shape
PLANNING CONSULTANTS

Retail and Leisure Needs Assessment

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Royal Borough of Kingston upon Thames

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Contents

Section 1 | Introduction | **02**

Section 2 | Policy Framework | **04**

Section 3 | National Trends | **14**

Section 4 | Sub-Regional Context | **23**

Section 5 | Kingston | **28**

Section 6 | New Malden | **39**

Section 7 | Surbiton | **47**

Section 8 | Tolworth | **54**

Section 9 | Local Centres | **62**

Section 10 | Quantitative Need | **86**

Section 11 | Leisure Assessment | **97**

Section 12 |Conclusions | **113**

Section 13 |Recommendations | **121**

Appendix 1 | Baseline Convenience Goods Need Assessment

Appendix 2 | Baseline Comparison Goods Need Assessment

Appendix 3 | Zone 1-10 Survey Area Plan

Appendix 4 | Local Centre Plans

Appendix 5 | Article 4 Direction, Town Centre Plans

1. Introduction

1.1 Urban Shape have been instructed by the Royal Borough of Kingston upon Thames Council ('the Council') to undertake a Retail and Leisure Needs Assessment (RLNA). The previous evidence base is now out-of-date in the context of planning reform, continued economic fluctuations, and the fast-paced evolution of the high street. It is timely to revisit and refresh the borough's retail and town centre strategy, and this up-to-date assessment forms a key part of the evidence base in support of the new Local Plan.

1.2 This study comes at a pivotal time for the high street, with the retail and leisure sector undergoing a period of unprecedented change. Since the publication of the previous Town Centre Study (2013), town centres have had to evolve to become more than simply a place to shop, presenting themselves as multi-purpose 'destinations'. For many this is work in progress. Key contributory factors to this evolution have included the continued rise of online shopping and home delivery dining and economic uncertainty triggered by Brexit, the Covid-19 global health pandemic, and wider world events. There is much optimism for the future of our high streets, but the need for a robust town centre strategy is more crucial now than ever.

1.3 This study provides the Council with an up-to-date and comprehensive understanding of the current health and performance of the retail and leisure offer within the existing network of town centres, sets out current and future needs for additional floorspace to the period 2041, and details robust strategic and detailed planning policy recommendations. The study meets the policy requirements of the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG) in the preparation of the Council's development plan.

1.4 Our terms of reference are to:

- Establish the extent to which the current retail and leisure provision in the borough satisfies the level and nature of consumer demand within the catchment – both qualitatively and quantitatively;
- Identify the scale and nature of additional convenience and comparison retail provision that may be appropriate across the borough to the period 2041, taking into consideration changes to population and forecast retail expenditure;
- Assess the scope for new retail and leisure development and the potential to accommodate this within the borough through a recommended town centre strategy for growth and/or change;
- Assess the appropriateness of the existing development plan policy approach for retail and leisure uses across the borough in order to inform emerging policies for the new Local Plan.

1.5 This report is informed by a new and up-to-date Household Telephone Survey covering 1,000 households across 10 survey zones (Appendix 3). Urban Shape designed the survey questionnaire in consultation with the Council and NEMS Market Research who undertook the interviewing and data processing in February 2024. Survey Zones have been consolidated from 15 Zones to 10, but the boundaries remain consistent with that used to inform the previous Town Centre Study undertaken in 2013, enabling direct comparisons to be made and trends identified.

1.6 In addition to on-site and desk-based research and the Household Telephone Survey, a further four in-centre shopper surveys were undertaken to inform the research. In March 2024, 200 interviews were undertaken across Kingston Town Centre and in April 150 interviews were undertaken across Tolworth, Surbiton and New Malden District Centres – 50 in each. The surveys sought to obtain more information in respect of shopper behaviour, dwell time, mode of travel, car parking, and broader views around likes and dislikes. The in-depth outputs have informed the town centre health checks and wider recommendations.

Report Structure

1.7 The RLNA is structured as follows:

- **Section 2** summarises the national and local planning policies relevant to retail and town centres across the borough and discusses legislative changes to the planning system which have a direct impact on the findings and recommendations of this study.
- **Section 3** considers the national context in terms of economic and sectoral trends.
- **Section 4** considers the wider sub-regional context, analysing shopping patterns and market share across the borough and the wider sub-region, and providing comparisons with the previous evidence base study in order to identify trends.
- **Section 5-8** provides detailed town centre health checks of Kingston Town Centre and the three District Centres including New Malden, Surbiton and Tolworth.
- **Section 9** considers the network of existing local centres across the borough, including a broad overview of mix and composition, geographic spread and environmental quality and parking/accessibility.
- **Section 10** sets out the quantitative 'need' for additional convenience and comparison goods retail floorspace to the period 2041.
- **Section 11** provides a detailed review of commercial leisure floorspace and sets out forecast growth in leisure expenditure across the borough.
- **Section 12** sets out the key conclusions from the preceding analysis.
- **Section 13** sets out our recommendations in respect of the opportunities for further growth and/or change, and the robustness of retail and town centre policies.

2. Policy Framework and Legislative Change

2.1 In this section, we summarise the points of relevance from national and local planning policy, which provide the context and framework for the remainder of this study. There have been sweeping amendments to planning legislation since 2020, which have direct and significant implications for emerging development plans and detailed development management policies. This section sets out the planning policy framework and outlines the relevant key changes to the Use Classes Order and Permitted Development Rights.

National Planning Policy Framework (2023)

2.2 The Government published the new version of the National Planning Policy Framework (NPPF) in December 2023, confirming in a statement that the intention is to 'place greater emphasis on beauty, place-making, the environment, sustainable development and underlines the importance of local design codes'. There is no change to retail and town centre policy guidance, which continues to ensure the vitality of town centres, placing them at the heart of their communities, and encouraging a positive approach to their growth, management and adaptation.

2.3 In order to be considered 'sound', Local Plans should be positively prepared, justified, deliverable and consistent with national policy. The NPPF is a material consideration in planning decisions.

2.4 Paragraph 53 and 54 of the NPPF provide guidance on the use of Article 4 Directions in the context of recently introduced Permitted Development rights. Changes to planning legislation, and the reasoning behind these new NPPF paragraphs, is discussed in more detail later in this section, but we quote paragraph 53 and 54 of the NPPF as follows:

> "53. The use of Article 4 directions to remove national permitted development rights should:
>
> - where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre).
> - in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities).
> - in all cases, be based on robust evidence, and apply to the smallest geographical area possible.
>
> 54. Similarly, planning conditions should not be used to restrict national permitted development rights unless there is clear justification to do so."

2.5 Section 7 of the NPPF seeks to ensure the vitality of town centres, emphasising that planning policies and decisions should support the role that town centres play at the heart of local communities, with a positive approach taken to their growth, management and adaptation.

2.6 Section 7 emphasises that planning policies are encouraged to seek a series of outcomes relating to the long-term vitality and viability of the hierarchy of town centres, the extent of primary shopping areas and the location of sufficient development opportunity sites. Local authorities are encouraged to define a network and hierarchy of town centres and to promote their long-term vitality and viability, facilitating them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries and reflecting their distinctive characters. The NPPF states that planning policies should also recognise the benefits of residential development and town centre living in ensuring the vitality of centres.

2.7 In respect of Development Management, paragraphs 91-95 of the NPPF 2023 clearly sets out policy requirements in respect of the sequential impact tests, concluding that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused.

2.8 Section 5, 7 and 8 of the NPPF 2023 sets clear guidance as to how planning policy can and should positively support neighbourhoods across the borough. Priorities include promoting social interaction, including opportunities for meetings between people who might not otherwise come into contact with each other; enabling and supporting healthy lifestyles; and providing social, recreational and cultural facilities and services the community needs (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship) and other local services. Paragraph 74 of the NPPF 2023 states that new residential developments should be supported by the necessary infrastructure and facilities.

Planning Practice Guidance (PPG)

2.9 In March 2014 the Department for Communities and Local Government (DCLG) launched online Planning Practice Guidance (PPG). Town centres and retail guidance was last updated in September 2020.

2.10 Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource also provides guidance on how to assess and plan to meet the needs of main town centre uses in full through the production of a positive vision or strategy for town centres.

2.11 The guidance provides additional detail on applying the sequential and impact test, and whilst the NPPF has removed reference to shopping ‘frontages’, the PPG confirms that authorities may, where appropriate, wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres. These frontage allocations would be in addition to Primary Shopping Areas.

2.12 The PPG confirms that the impact test only applies to proposals exceeding 2,500 square metres gross of floorspace, unless a different locally appropriate threshold is set by the local planning authority.

Development Plan

London Plan (March 2021)

2.13 In March 2021, the Mayor adopted the London Plan. It is a strategic spatial planning document setting the London wide context within which individual London Borough’s must set their local planning policies. The London Plan forms part of the Development Plan for the purposes of development control and planning decisions, and local policy frameworks must be 'in general conformity'.

i) Good Growth and Opportunity Areas

2.14 The concept of 'Good Growth' – growth that is socially and economically inclusive and environmentally sustainable – underpins the Plan and ensures a focus on sustainable development. In 'Planning for Good Growth', paragraph 1.0.10 confirms that planning for mixed-use developments in all parts of London will spread the success of London's economy and create stronger communities where everyone feels welcome.

2.16 Policy GG1 seeks to build strong and inclusive communities, stating that development must provide access to good quality services and amenities that accommodate, encourage and strengthen communities, increasing active participation and social integration, and addressing social isolation. The policy adds that development must also promote the crucial role of town centres, and plan for places that provide important opportunities for face-to-face contact and social interaction during the daytime, evening and night-time.

2.17 Policy GG2 of the London Plan states that in order to create successful, mixed-use places that make the best use of land, priorities for development should be Opportunity Areas, brownfield land, surplus public sector land, sites which are well-connected by existing or planned Tube and rail stations, sites within and on the edge of town centres, and small sites.

2.18 The London Plan identifies a total of 48 'Ongoing Opportunity Areas' (OA's) across Greater London (London Plan Policy SD1), including Kingston Opportunity Area as part of the wider Crossrail 2 South area. The London Plan states that the Opportunity Areas are identified as significant locations with development capacity to accommodate new housing, commercial development and infrastructure (of all types), linked to existing or potential improvements in public transport connectivity and capacity.

2.19 The Kingston OA has an indicative capacity for 9,000 new homes and 5,000 new jobs, albeit this is dependent on the implementation of Crossrail 2, a new proposed railway serving London and the wider South-East. Paragraph 2.1.25 of the London Plan states that the borough will benefit from more Crossrail 2 stations than any other and the arrival of the new, higher frequency, higher capacity service will enable significant additional growth opportunities in these areas, including additional commercial growth in Kingston Town Centre. Kingston, New Malden and Tolworth are listed as having scope for significant change.

2.20 Originally anticipated to be operational in the 2030's, work on the design and delivery of Crossrail 2 was suspended in 2020 as part of the Transport for London (TFL) Funding Agreement. TfL has, however, continued to safeguard land to enable construction, and has recently updated and reinforced safeguarded land boundaries (May 2024). There is substantial uncertainty around the London Plan aspiration for the Kingston OA, and delivery is unlikely during the forthcoming Local Plan period through to 2041.

ii) The role of town centres

2.21 Policy SD6 of the London Plan sets out the Mayor's approach to promoting and enhancing the vitality and viability of London's varied town centres. The policy emphasises that town centres will continue to be promoted and enhanced as 'strong, resilient, accessible, inclusive hubs with a diverse range of uses including main town centre uses, night-time economy, civic, community, social and residential uses'. Town centres are identified as suitable locations for mixed-use and housing led intensification, and primary locations for commercial activity beyond the Central Activities Zone (CAZ). Policy SD6 encourages the strengthening of the role of town centres, creating a sense of place and local identity in the capital.

2.22 Policy SD6 acknowledges that the adaptation and diversification of town centres should be supported in response to the challenges and opportunities presented by multi-channel shopping and changes in technology and consumer behaviour. Policy SD6 also places particular emphasis on promoting town and edge of centre sites for mixed-use or residential development, managing vibrant daytime, evening and night-time activities in town centres, and directing tourist infrastructure, attractions and hotels to town centre locations.

iii) Development principles

2.23 The London Plan takes a strong town centres first approach, confirmed under Policy SD7, which reflects the approach of the NPPF in requiring applications for development not within a defined centre to demonstrate compliance with the sequential and impact tests.

2.24 Policy SD7, 'Town Centres', states that when considering development proposals, boroughs should take a town centres first approach. Boroughs are directed to apply the sequential test to applications for main town centre uses, requiring them to be located in town centres. If no suitable town centre sites are available or expected to become available within a reasonable period, consideration should be given to sites on the edge of centres that are, or can be, well integrated with the existing centre, local walking and cycle networks, and public transport. Applications that fail the sequential test should be refused.

2.25 Policy SD7 requires an impact assessment on proposals for new, or extensions to existing, edge or out-of-centre development for retail, leisure and – going beyond advice set out in the NPPF – office uses that are not in accordance with the Development Plan. Applications that are likely to have a significant adverse impact should be refused.

2.26 Policy SD7 adds that boroughs should:

- realise the full potential of existing out-of-centre retail and leisure parks to deliver housing intensification through redevelopment;
- assess the need for main town centre uses, forecasting future need;
- allocate sites to meet need arising;
- review and define town centre boundaries and shopping frontages;
- identify centres that have scope to accommodate new commercial development and higher density housing as per growth potential indicators (Annex 1);
- identify sites suitable for intensification, which may include supermarket sites, surface car parks or edge of centre retail/leisure parks, town centre shopping frontages which are surplus to demand, and redevelopment of low-density town centre buildings which are not of heritage value; and
- support flexibility for temporary or 'meanwhile' uses of vacant properties.

2.27 Policy HC6 aims to support the night time economy by promoting, improving and diversifying the night-time economy. The policy also recognises adverse consequences and recommends local authorities address the cumulative impact of high concentrations of licensed premises on anti-social behaviour, noise pollution, health and wellbeing and other issues for residents and nearby uses and seek ways to diversify and manage these areas. The policy recommends an integrated management approach.

iv) Town centre network

2.28 Policy SD8 of the London Plan sets out the approach to the management of the town centre network across Greater London, and is supported by a classification of each centre in the town centre hierarchy at Annex 1. The London hierarchy of centres is headed by two 'International' centres (West End, Knightsbridge) and 14 Metropolitan Centres, followed by 'Major' and 'District' Centres, and locations which fall within CAZ Retail Frontage. The London Plan highlights that the classification of International, Metropolitan and Major Town Centres can only be changed through the London Plan.

2.29 Policy SD8 states that International, Metropolitan and Major Centres should be the focus for higher-order comparison goods retailing; and District Centres should focus on the 'consolidation of a viable range of functions', particularly convenience goods retailing, leisure, local employment and workspace. District Centres should also 'address the challenges of new forms of retailing and securing opportunities to realise their potential for higher density mixed-use residential development and improvements to their environment'.

2.30 The following centres in the borough are identified in the London Plan centre hierarchy (Annex 1):

- 'Metropolitan' Centre – Kingston;
- 'District' Centres – New Malden, Surbiton, Tolworth.

Kingston Core Strategy 2012

2.31 The Kingston Core Strategy was adopted in April 2012, setting out how the development needs of the borough will be met up to 2027, and including both strategic and Development Management policy guidance as one document. It forms part of the Statutory Development Plan for the borough. The town centre specific policies and strategies are set out in this report within each respective town centre section, and here we summarise the generic town centre policies relevant to this evidence base.

2.32 Section 6 sets out policies in respect of retail and town centres, confirming that the borough's retail hierarchy comprises Kingston Town Centre, three District Centres (New Malden, Surbiton and Tolworth) and 25 Local Centres. Policy CS12 states that the Council will maintain and enhance the attractive and distinctive character of Kingston Town Centre and its role as a sustainable Metropolitan Centre; and will seek to enhance the vitality and viability of New Malden, Surbiton and Tolworth District Centres so that they complement the role of Kingston Town Centre.

2.33 Policy DM18 seeks to protect existing retail uses, stating that the Council will retain shopping frontages in the District Centres predominantly for retail use, so that they continue to provide locally accessibly goods and services and employment opportunities of a suitable scale for the size of centre. The policy supports local shops and the predominance of A1 (retail) uses.

2.34 Policy DM20 addresses new retail development, stating that the Council will consider applications for new retail development in designated centres favourably, in order to meet identified future needs; support the co-location of retail and community facilities; ensure that any applications for new retail development are of an appropriate scale; and ensure that any applications for new retail development demonstrate the application of the sequential approach and provide an impact assessment as outlined in national policy. Paragraph 6.129 emphasises that Kingston Town Centre remains strong, competitive and retains its metropolitan status, adding the importance of delivering and implementing the Kingston Town Centre Area Action Plan (K+20) (see below).

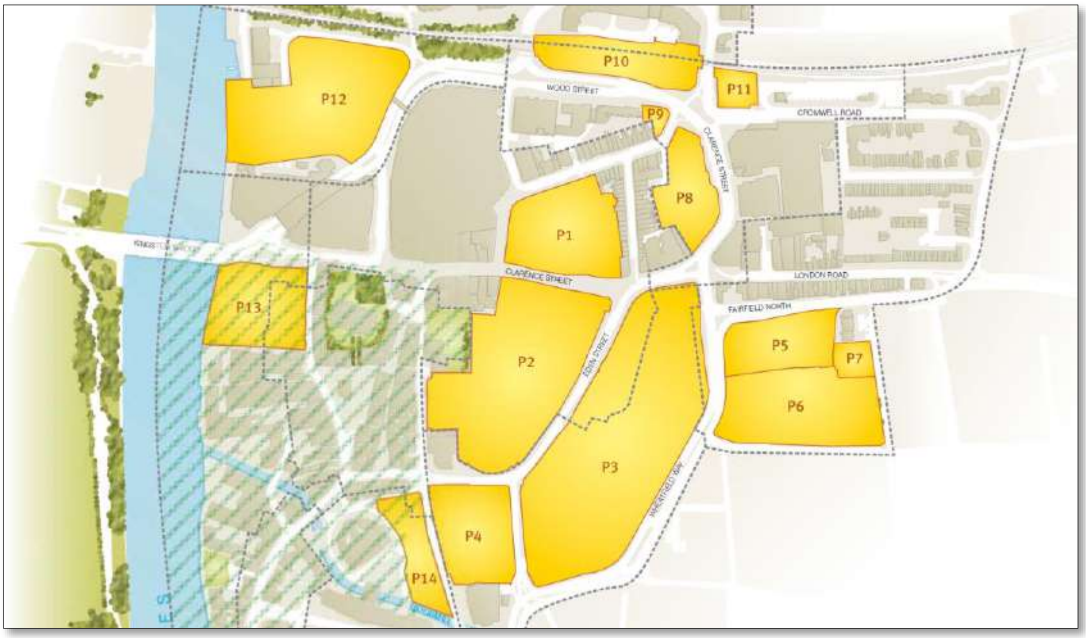
Kingston Town Centre Area Action Plan 2008

2.35 The Area Action Plan (AAP) for Kingston Town Centre forms part of the Council's statutory development plan, setting out planning policy for Kingston Town Centre over the period to 2020. At the time there were concerns about the town's attractiveness and vitality, following a loss of daytime visitors and increasingly vibrant night-time economy. Several large development schemes were nearing completion and there was pressure – at that time – for further development. Published in 2008 the Plan is now considerably out-of-date, but when preparing new recommendations, it is useful to understand the previous planning strategy and policy framework.

2.36 Policy K1 outlines the Council's support for new and enhanced shopping facilities, stating that the Council will work with private sector land and property owners to provide 50,000 sq m gross additional retail floorspace for comparison goods by 2016. The policy confirms that this will be achieved through new retail development on Proposal Sites P1, P2 and P3 to enhance and extend the Primary Shopping Area (albeit, development has only taken place on part of P3):

- P1: Clarence Street North
- P2: Eden Quarter – South of Clarence Street
- P3: Eden Quarter – East of Eden Street and Ashdown Road

Figure 2.1: Proposal Sites Including P1, P2 and P3



2.37 Policy K1 also seeks to maintain the existing level of convenience goods floorspace and retain a mix of shop sizes within the Primary Shopping Area. Retail floorspace need was presented in the 2003 and 2006 Retail Studies, published prior to the 2008 economic crash and subsequent turbulent markets.

2.38 Policy K2 is now out-of-date in light of planning reform (set out below). The policy seeks to control Use Classes A1, A2, A3, A4 and A5 throughout the ground floor of Primary and Secondary Frontages, and to bring back into active use upper floors for residential, offices or community uses. Policy K3 reinforces the enhancement of the market in Kingston Town Centre focusing on licensing, scale and design; and Policy K4 promotes the town centre as an office and business centre, improving the quality and range of offices.

2.39 Policy K6 states that the Council will grant planning permission for proposals which enhance or diversify the range of arts, culture, entertainment, leisure and recreational facilities, and refuse planning permission for proposals involving the loss of such uses, unless replacement facilities are provided. Proposal Sites P12 or P17 are identified for a hotel with conference and banqueting facilities (Fig.2.1 above).

Legislative Change: Use Classes Order

2.40 In October 2018, the Government published a consultation into a series of proposed planning reforms designed to speed up and simplify the planning system; the focus of which was on supporting the high street and increasing the delivery of new homes. The consultation recognised the changing and evolving nature of high streets and town centres across the country, and invited responses on a variety of development management methods which Councils could use to promote greater flexibility.

2.41 Part 1 of the consultation included proposals in respect of new and amended Permitted Development (PD) rights and changes to use classes, including to support the regeneration of the high street and to extend existing buildings upwards to create new homes. The Government proposed new PD rights to allow existing premises in typical high street uses to change to a wider range of uses, allowing more leisure and community uses such as gyms, libraries, health care and office use as well as homes.

2.42 With the rise of internet shopping, and the change in how people use the high street, the consultation highlighted that it was timely to consider how the operation of the Use Classes Order can support greater flexibility. It noted the need to support the modernisation of the high street and enable businesses to adapt to changes in consumer demands.

2.43 The Government published their response to the consultation in May 2019, which confirmed the intention to move away from a suggested single use class which would merge A1, A2 and A3. The government response paper stated that 'more than half of the 276 responses agreed that changes to the A use classes would support the high street [and] there was considerable support to simplify the A1 use class to accommodate new and emerging retail models'. There was, however, concern that:

> *"…merging the A1, A2 and A3 use classes would enable change to restaurant use without any local consideration of the potential impacts from longer opening hours and increased noise and odours. It could lead to a proliferation and increased concentration of restaurants, including fast food restaurants, in an area with an impact on the health of local residents and local amenity. There was also a concern*

that it would limit the ability of local communities to shape their high streets as set out in local or neighbourhood plans."

2.44 Rather than the far-reaching amendments proposed as part of the consultation paper, and in response to the consultation, the Government announced that it would only amend the A1 (shops) use class to ensure it captured current and future retail models and include clarification on the ability of (A) use classes to diversify and incorporate ancillary uses.

2.45 Shortly afterwards however, as a consequence of the Covid-19 pandemic, the Government decided to go further and introduce more wide-reaching reforms to the Use Classes – without further public consultation. This was a specific and swift response to the economic impact of Coronavirus on high streets and those premises in A1 and A3 in particular. In force from 1st September 2020, new planning regulations revoked parts A, B and D of the existing use classes order and introduced a new 'commercial, business and service' Use Class E, and a new 'Local Community and Learning' Use Class F. In relation to retail and main town centre uses, the changes are as follows:

- New Class E includes:
  - Shops (former A1)
  - Provision of financial and professional services (former A2)
  - Sale of food and drink consumption on premises, 'cafes and restaurants' (former A3)
  - Indoor sport, recreation, fitness (gyms) (former D2)
  - Provision of medical or health services (former D1)
  - Creche, day nursery or day centre (former D1)
  - Offices, research and development, light industrial (former B1a, b and c)
- Former A4 (drinking establishments, public houses/wine bars) and A5 (hot food takeaway) uses to become defined as Sui Generis.
- Former D2 cinemas, concert halls/live music venues, bingo halls and dance halls to become defined as Sui Generis.
- New Use Class F includes education, display of works of art, museums, public libraries, public halls or exhibition halls, public worship, law courts, halls and meeting places, outdoor sport and recreation, and indoor and outdoor swimming pools.

2.46 A series of more protected community uses have been moved into a new Class F, including isolated small shops in rural locations, public halls, the provision of education and libraries.

Legislative Change: Permitted Development

2.47 Following consultation in December 2020, the Government confirmed on 31 March 2021 that a new permitted development (PD) right to allow the change of use from any use, or mix of uses, from the Commercial, Business and Service use class (Class E) to residential use (Class C3) would be introduced under Class MA of the Town and Country Planning (General Permitted Development etc.) (England) Order 2021.

2.48 The Government considered that the announced package of measures would help support the creation of much-needed homes while also giving high streets a new lease of life, enabling them to adapt and thrive – 'transforming unused buildings and making the most of brownfield land'.

2.49 The new PD rights, which commenced on 1 August 2021, allow unused commercial buildings – or parts of buildings – to be granted permission for residential use via a fast-track prior approval process. Councils are only able to assess prior approval applications on a narrow range of specific considerations including: flooding, noise from commercial premises, adequate light to habitable rooms and impact on a conservation area, for example. The PD rights were updated again in March 2024, streamlining further, and now includes only one restriction, as follows:

- the building must have been in a commercial, business, or service use for at least two continuous years previously.

Article 4 Directions

2.50 An Article 4 direction is made by the local planning authority. It restricts the scope of permitted development rights either in relation to a particular area or site, or a particular type of development anywhere in the authority's area. Where an Article 4 direction is in effect, a planning application may be required for development that would otherwise have been permitted development.

2.51 It is possible to introduce an Article 4 Direction to prevent permitted change of use from Use Class E to residential use. In a Written Ministerial Statement in July 2021, it was highlighted that "in very specific circumstances, local authorities can make Article 4 directions to suspend individual permitted development rights, when justified by robust evidence, [but added that it must be] used in a highly targeted way to protect the thriving core of historic high street areas, but does not unnecessarily restrict the ability to deliver much needed housing through national permitted development rights".

2.52 The Written Ministerial Statement confirmed the introduction of the new paragraphs 53 and 54 of the NPPF, and encourages Councils to 'recognise the value to housing supply and increasing resident town centre footfall from supporting 'flats above shops'; for example'. The Government considered this to be important to support mixed and flexible high streets, to deliver additional homes more easily, and to support jobs in the construction industry, while increasing demand for local high street services through new high street homes.

2.53 The statement encourages local authorities to carefully target any proposed Article 4 areas, focusing on the Primary Shopping Area supported by robust evidence to justify the Article 4 direction and the area it covers.

2.54 A borough-wide Article 4 Direction came into force on 31st July 2022, removing permitted development from Use Class C3 (residential) to Use Class E (commercial, business and service uses) as follows:

> *"Development consisting of the change of use of a building and any land within its curtilage to a use falling within Class C3 (dwellings) of the Schedule to the Town and Country Planning (Use Classes Order) 1995 (as amended) from a use falling within Class E (commercial business and service uses) of that Schedule being development comprised*

within Class MA of Part 3 of Schedule 2 to the GPDO and not being development comprised within any other Class."

2.55 The areas covered by the Article 4 Direction are the borough's designated main town centres, local centres and industrial areas. In June 2023 a modification notice came into force following direction from the Secretary of State, focusing the areas/boundaries to cover the most essential commercial, business and service uses. The Article 4 Direction plans for Kingston, Tolworth, Surbiton and New Malden Town Centres are attached in Appendix 5.

Summary

- The NPPF advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The NPPF encourages councils to recognise that town centres are the heart of their communities and to pursue policies which protect their health and vitality.
- The London Plan (2021) aims to build strong and inclusive communities, and emphasises that development must also promote the crucial role of town centres as places that provide important opportunities for face-to-face contact and social interaction during the daytime, evening and night-time. The London Plan encourages the strengthening of the role of town centres, and acknowledges that the adaptation and diversification of town centres should be supported in response to changes in technology and consumer behaviour.
- The London Plan also promotes higher density mixed-use or residential development in and on the edge of town centres – where suitable. The London Plan endorses the application of the sequential and impact test, but – going beyond the NPPF – also requires an impact assessment on proposals for new, or extensions to existing, edge or out-of-centre office uses [that are not in accordance with the Development Plan] – in addition to retail and leisure uses.
- The London Plan identifies Kingston as an Opportunity Area, enabling significant additional growth opportunities, but dependent on the delivery of Crossrail 2. This major transport infrastructure project was halted in 2020, and whilst safeguards remain in place around land parcels which would enable Crossrail 2, delivery and completion is unlikely over the forthcoming plan period to 2041. This evidence base does not, therefore, test such major strategic growth and assumes that Crossrail 2 is not delivered over this plan period.
- The Core Strategy seeks to control shopping frontages using the now out-of-date Use Class A land use category, and aspires to strengthen and grow the retail offer in Kingston Town Centre. The AAP informed the Core Strategy, identifying a need for 50,000 sq m of retail floorspace to the period 2016. These forecasts were not delivered and preceded very different economic and market circumstances. This evidence base seeks to update these projections and advise on policy and strategy moving forwards.
- In force from 1st September 2020, new planning regulations revoked parts A and D of the existing Use Classes Order and introduced a new 'commercial, business and service' Use Class E, incorporating former A1, A2 and A3 retail uses. Former A4 (drinking establishments, public houses/wine bars) and A5 (hot food takeaway) uses and D2 cinemas, concert halls/live music venues, bingo halls and dance halls are now defined as Sui Generis.

3. National Retail and Leisure Trends

3.1 Consumer and economic trends in the retail and leisure sector have important implications on the formulation of planning and spatial strategies and the future vitality and viability of each individual town centre across the UK.

3.2 Trends in recent years have been well documented. They closely follow global economic fluctuations, growth in online shopping/multi-channel retailing; changes in the property and space requirements of retail operators; evolution towards multi-dimensional town centres; the growth of the commercial leisure sector; and changes in the convenience goods sector with the growth of discount retailers and more varied food shopping habits. Sectoral analysis and published evidence confirm that town centres will need to continue to evolve and adapt to remain vital and viable locations.

3.3 To inform our commentary, we note the following definitions:

- Convenience: bakers, butchers, supermarket, fishmongers, grocers, newsagent;
- Comparison: clothing, footwear, chemist, charity, cycle shop, DIY/electrical, florist, mobile phone;
- Leisure Service: café, bars, restaurants, hot food take-away, bars/wine bars;
- Financial & Business: banks, building societies, estate agents, employment and careers;
- Retail Service: dry cleaners, opticians, Post Office, health and beauty, hairdressers.

The Evolving Role of the Town Centre

3.4 Retail will continue to be an important footfall driver in town centres, and whilst high streets are evolving, the role of retail and retail operators should continue to form an important element to any town centre strategy moving forwards. Nevertheless, trends and the need to inject life into our high streets have introduced new, multi-dimensional elements to town centres which should be promoted and incorporated alongside retail into emerging town centre strategies. These can be summarised as follows:

- The development of an **'experience'** for visitors who are increasingly seeking to combine retail and leisure activities as part of a single 'going out' trip. Town centres must provide an attractive experience for visitors which the internet is unable to match. This might include specialist markets, independent cinemas, street food and seasonal events, for example.
- Town centres acting as genuine **hubs for their communities**, and the need to create a vibrant social, commercial and cultural destination. Uses might include cultural space, co-working space, space for small and medium-sized enterprises (SME's), community facilities including libraries, education space, community halls/meeting venues, and health centres.
- Larger scale **'destination' uses** including conference centres, hotels, offices, cultural and performance venues.
- Growth in **town centre living** and residential space/student accommodation – delivering footfall in the evenings and at weekends as well as during the daytime. A town centre strategy will require consideration of noise, environmental health and licensing hours in order to consider residential amenity alongside a supported evening economy.

High Streets Report (2018)

3.5 Uncertainty around the future of our town centres and observations around how they are evolving has been taking place for some years. In December 2018, the Government published 'The High Street Report', setting out the findings of the 'High Streets Expert Panel' which was established earlier in 2018. The Panel, Chaired by Sir John Timpson, sought to identify the key issues facing high streets and town centres, and advise on the best practical measures which the Government can take to help. In introducing the report, Sir John stated:

> *"Town centres are evolving, and retail will not return to the high streets that existed 10 or 20 years ago. A combination of internet shopping, the convenience of out of town retailing and an exceptional number of well-established retail formats reaching the end of their commercial life, has led to a marked increase in empty shops and a decline in footfall.*
>
> *In completing this report, I have more hope for the future of our town centres than when we first started gathering evidence."*

3.6 He added that throughout their report, they use the term 'town centre' rather than 'high street' because their recommendations are not just about shops and shopping. The town centre of the future should attract local people to take part in a variety of activities – including dining, leisure and sport, culture and the arts, entertainment, medical services, and many more uses. They should also contain business premises, offices, and residential including affordable housing.

The Future of our Towns and City Centres Report (2019)

3.7 Instructed by 'Key Cities Group' (a diverse cross-party partnership of councils for urban cities and places), consultants 'Infusion' were asked to 'review the current state of play across our town and city centres'. The Future of our Towns and City Centres Report (2019) starts by highlighting that over the course of the last decade, the British High Street has faced some of its biggest challenges in history. From a major economic downturn, through new retail methods and in conjunction with already-ongoing shifts in consumer spending and visiting patterns, some of the country's most recognisable names have disappeared from our city centres. Many more major retailers were identified as facing huge difficulties and consequently undertaking seismic shifts in order to maintain their viability.

3.8 The report presents a strong position statement – 'with the retail sector undergoing such major change, there is a very real threat to the existing model underpinning the vibrancy and sustainability of our city centres'. It emphasises that the retail sector has historically anchored much of our central area floor space, particularly at the visible and impactful ground floor level, and generated the bulk of footfall. With the convenience of newer methods of shopping likely to outweigh the convenience of central area shopping for the foreseeable future, it concludes that city centres can no longer rely on retail to be relevant.

3.9 The report states that central areas need to be diverse in the way their space is used to maintain their vibrancy, and activity in centres cannot be confined to daytimes. Ideally, town and city centres should not only be locations people shop in, but also eat in, drink in, work in and live in. The role of retail is still relevant and important, but the report concludes that 'as well as town centres being a focal point for retail, they need to become areas in which people live, work and spend their leisure time'.

Economic Trends

3.10 Since the 2013 Town Centre Study was published, the UK's 2016 decision to leave the European Union has become an influencing factor in forecasts of economic growth. The UK economy slowed during 2019, sliding to a 7 year low by the end of the year, household spending growth slowed to an 8 year low of 1.2% in 2019, income growth was disappointing, and retail sales volumes grew by 3% - the weakest reading since 2014. The Experian 'Retail Planner Briefing Note 17' (February 2020) attributed this to the period being dominated by heightened Brexit uncertainty and a weaker global economy.

3.11 Experian subsequently noted that the outcome of the December 2019 general election removed near-term political uncertainty and the risk of a no deal Brexit, empowering the government to push forward with spending pledges and EU withdrawal plans. In February 2020, Experian recorded a pick-up in business confidence and investment intentions; whilst housing market surveys suggested activity was rebounding and consumer sentiment improving.

3.12 Nevertheless, and even before factoring in Covid-19, Experian forecast that GDP growth was set to remain on a slower growth trajectory of 1-1.5% over 2020 and 2021, well below the performance of earlier years. This is reflected in Section 10 when forecasting need for future retail floorspace across the borough, with outputs clearly demonstrating the direct consequent impacts on forecast expenditure growth rates for both convenience and comparison goods.

Online and Multi-Channel Retailing

3.13 Online spending has become a firmly established method of shopping. Evidence demonstrates the continued growth of this sector in terms of those that have internet access, those that use the internet every day, the methods and modes used to undertake such transactions, and the breadth of the population taking advantage of what is on offer, with the largest rise in the 65+ age group in recent years.

3.14 Recent data from the ONS confirms the extent to which online platforms now form part of the population's shopping habits. The most recent data available from the ONS on online usage is from August 2020, which identified that:

- In January to February 2020, 96% of households in Great Britain had internet access, up from 93% in 2019 and 57% in 2006 when comparable records began.
- Over 85% of adults use the internet every day. Daily internet usage has more than doubled since 2008.
- In January to February 2020, 76% of adults in Great Britain used internet banking, increasing from 30% in 2007 and 73% in 2019.
- 78% use mobile phones/smartphones to access the internet. In certain age groups this figure is substantially higher: in the 25-34 year old age group, the figure is 99%; for 16-24 year olds it is 98%; and for 35-44 year olds it is 96%.
- In January to February 2020, 87% of all adults shopped online within the last 12 months, up from 53% in 2008; those aged 65 years and over had the highest growth, rising from 16% to 65% over this period.

- In August 2020, 100% of adults in the 16-24 and 25-34 old age group shopped online; and over 96% of 35-54 age group shopped online. By contrast, only 67% of those over 65 years shop online - however this age group has shown the largest increase in online shopping uptake, increasing from 48% in 2018, and 16% in 2008.

3.15 When looking at the frequency of online shopping and the amount typically spent online, it can be seen that considerable amounts of spend are now being diverted online, which is spend lost from 'bricks and mortar' town centre stores. The ONS identifies that:

- Of those adults who purchased online in the last three months, adults aged 16-24 typically shopped online once or twice; however those in the 25-34, 35-44 and 45-54 age groups most typically shopped online at least ten times over a three month period. In the 35-44 age group, 48% shopped online more than ten times over the three month period.
- Across all age groups, shoppers typically spent between £100 and £499 online in the last three months. In the 35-44 year age group, 30% of adults spent over £1,000 online in the three month period.

3.16 Importantly for town centres, it has been evidenced that only 15% of online shoppers buy all of their fashion items online, with the remaining 85% using both online and physical stores. This highlights the importance of having a 'joined-up' town centre 'experience' to lure shoppers away from the internet and instead to visit the high street and to extend their dwell time through a range of retail and leisure attractions.

Covid-19 and Online Shopping

3.17 Experian report that there was a marked increase in online shopping during and since the Covid-19 crisis, which has further accelerated the already strong growth trend seen over the past decade. The rising share of internet sales in total retail transactions is the key trend for Special Forms of Trading (SFT). Internet sales share of total retail surpassed 19% in 2019 before lurching up to over 30% in the second quarter of 2020, against less than 5% in 2008.

3.18 With lockdown measures related to Covid-19 relaxing since the second quarter of 2020, the share of internet sales in total retail transactions has eased from its peak (Figures 3.2 and 3.3 below), and it is anticipated that some of the increase in the internet sales share seen during the pandemic will remain throughout the forecast period.

3.19 Figures 3.2 and 3.3 below illustrate the small drop from the high peak of growth, but not to pre-Covid-19 levels, and will be followed by continued steady forecast growth. These findings are consistent with our findings in respect of Kingston Town Centre as set out in later sections of this report.

3.20 The ease of online purchasing has also continued to improve rapidly, with technological advances, particularly around smartphones and connectivity. Faster delivery times, including same day delivery, and easier returns processes have also encouraged the trend. Beyond 2024, Experian expect the SFT market share to continue to grow steadily in the mid-term.

Figure 3.2: Convenience Goods Internet Sales Growth Trends and Forecasts

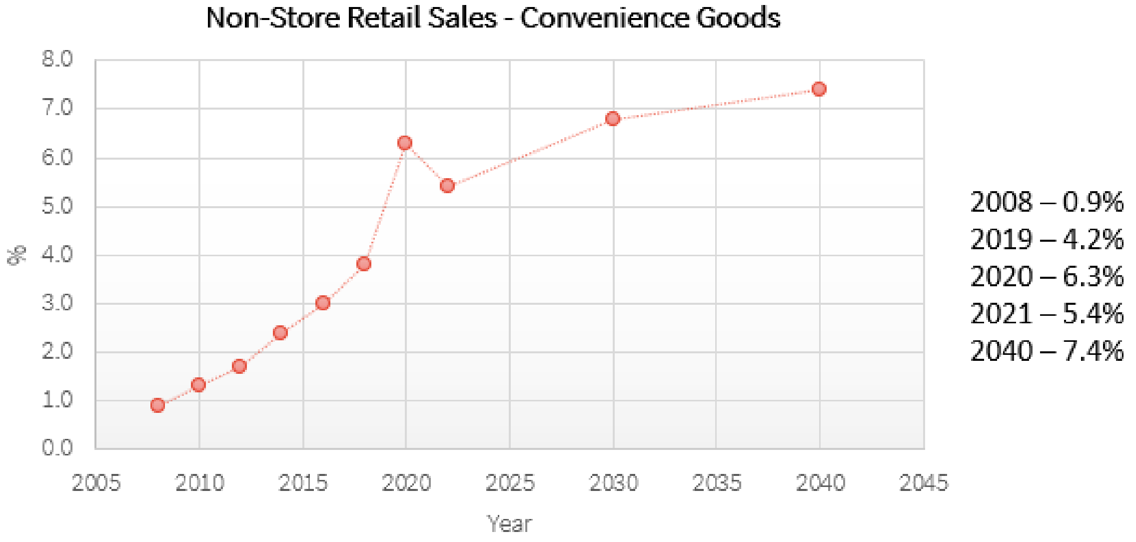
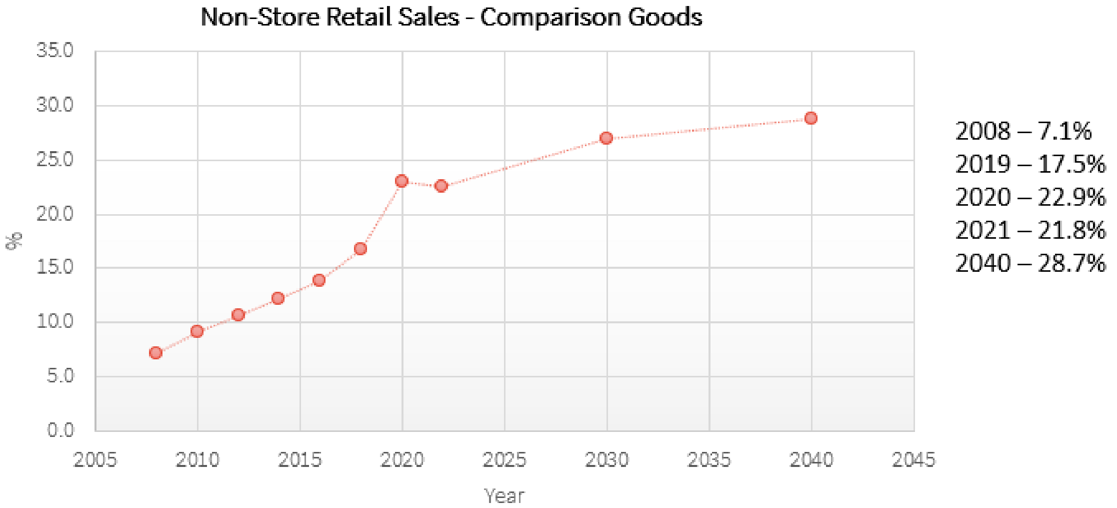


Figure 3.3: Comparison Goods Internet Sales Growth Trends and Forecasts



Click and Collect

3.21 Research indicates that the click and collect market will grow by a further 46% by 2024. Click and collect allows a shopper to order and pay for a product online, and then have it delivered to the nearest physical retail store of that operator. This has been an important opportunity for town centres, as it act as a footfall generator in its own right. Research demonstrates that 39% of consumers make an additional purchase in that town centre when collecting an item from a store. In larger town centres, such as Kingston, this is relevant in most of the larger multiple retail businesses, and in smaller town centres this service is often provided by convenience stores servicing many businesses – Collect+ for example.

3.22 A challenge to the continued growth of click and collect is the rise of instant delivery and saver delivery services, as businesses aim to match efficient delivery options and consumer expectations.

This includes same day delivery, one-hour delivery windows, and delivery passes whereby a consumer pays an annual subscription to guarantee same day, next day or timeslot delivery options. The impact of this on click and collect and associated opportunities for town centres will need to be monitored.

High Street Losses

3.23 The economic trends referred to above, combined with the continued growth in online sales have had a significant and permanent impact on consumer shopping and spending behaviour. In turn, this has created significant hurdles for traditional 'bricks-and-mortar' retailing and the high street.

3.24 These national trends have added to operator challenges already being experienced as a consequence of the retail property business model. Notably, operators face high costs of running retail outlets, including rents, business rates and high labour costs; they experience low profitability caused by high costs, slow growth in sales, squeezed profit margins and heavy price competition. They have been slow to respond and to prepare for the fast-paced changes being experienced on the high street, overlooking and disregarding the need to invest.

3.25 Operators have experienced a significant impact from the economic environment, the rise in online shopping and the property market, with many high profile high street casualties in recent years. Many operators will survive, but may instead look to rationalise their store portfolios. Since the previous study, the following operators have found themselves in administration and in many cases, closure:

- Beales (2020)
- Top Shop / Top Man (2020)
- LK Bennett (2020)
- Oasis and Warehouse (2020)
- Dorothy Perkins (2020)
- Miss Selfridge (2020)
- Burton (2020)
- Jaeger (2019)
- TM Lewin (2020)
- Kath Kidston (2020)
- Laura Ashley (2020)
- Mothercare (2019)
- Debenhams (2019)
- Edinburgh Woollen Mill (2019)
- HMV (2018)
- House of Fraser (2018)
- Poundworld (2018)
- Maplin (2018)
- Toys R Us (2018)
- Store Twenty One (2017)
- BHS (2016)
- Brantano (2016)

3.26 The Covid-19 Grimsey Review (June 2020), published by the Government's High Streets Task Force, references statistics published in the months just prior to the pandemic by CBRE, highlighting the stark downturn in the retail property market. The report quotes a 42% fall in retail property investment between 2014 and 2018; a 78% drop in shopping centre investment over the same period; and a 47% drop in the value of retail property assets changing hands between 2017 and 2018. The report adds that there were no new shopping centre openings in 2019, although some were extended, whilst a third of London shopping centres were subject to planning applications for at least some element of conversion to residential use.

3.27 Even before Covid-19, the retail property market was particularly unstable, and it is predicted that ongoing economic challenges has and will continue to drive a substantial amount of retail property into the hands of insolvency practitioners.

Commercial Leisure Sector

3.28 In recent years, the commercial leisure sector has played an increasingly important role in the vitality and viability of town centres, as the nature of town centres continues to evolve. In many new town centre schemes, a cinema or family/casual dining has replaced retail as the 'anchor', driven by the growth of this sector and the need for town centres to generate a more varied visitor experience.

3.29 In recent years, the commercial leisure sector has played an increasingly important role in the vitality and viability of town centres, as the nature of town centres continues to evolve. Leisure uses will continue to be important attractors in town centres, demonstrated by a continued uptick in leisure spending over the last 12 months1, despite the cost-of-living crisis and associated consumer constraints. Both Savills and the Nationwide Caterers Association report that after facing extremely challenging circumstances and substantial closures across the industry, the signs of recovery are stable and strong.

3.30 Pub, restaurant and fast food spend have been trending particularly well for some time, above their long-term averages, whilst entertainment spend – which includes membership clubs, cinemas, ticketed events, sports, galleries, and tourist attractions – have performed above pre-Covid benchmarks. We explore these trends further in Section 11.

The Convenience Retail Sector

3.31 The trends being experienced in the food retailing sector were establishing themselves to varying degrees at the time of the 2013 Town Centre Study. Major food superstores have experienced a substantial decline in market share whilst small format top-up stores have gained market share. Discount retailers – Aldi and Lidl – are continuing to achieve strong growth, and online spend is continuing to grow although not to the same extent as non-food shopping. Market growth is currently focused in the deep discount market, with strong continued growth from Lidl, Aldi and Iceland, who continue to seek new sites.

Banks and Financial Services

3.32 The numbers of bank branches in the UK have been in decline for the past thirty years, due to a variety of reasons including the desire by banks to cut costs; mergers within the industry; competitive pressures from new entrants in the banking sector; changes in the nature of retail banking transactions; and a growth in alternative means of accessing bank services, particularly driven by technological advances such as online and mobile banking.

3.33 According to research from CACI (analytical research company, providing operator trend data) customer visits to retail bank branches are forecast to drop by 36% between 2019 and 2025, with

[1] Savills, UK Leisure Spotlight 2024

mobile transactions rising 121% in the same period. CACI estimate that the typical person will visit a retail bank branch just four times a year, down from seven in 2017.

3.34 Most banks have an alliance with the Post Office (whose own branch network has remained relatively stable in recent years), meaning that in most smaller centres there are still banking facilities available to those who are not able to use alternative means. However, the decline of bank branches has also served to free up large, often historic and listed commercial premises in central town centre locations, which are in some instances challenging to let.

Out-of-Centre Retailing

3.35 Out-of-centre retailing offers the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict (national retail intelligence and trend analysts), out-of-town retailing is the only form of retailing which saw store numbers increase consistently since 2000. The Department for Business, Innovation and Skills reported that the number of out-of-centre stores had increased by up to c.1,800 (25%) since 2000.

3.36 The recovery of market confidence which took place in the period since 2013 (and the Kingston Town Centre Study) benefited out-of-town retailing. Vacancy rates fell, footfall increased, and many retailers were seeking expansion in existing – and some new – out-of-centre locations. Some traditional town centre retailers developed out-of-town store formats, including John Lewis which opened a number of 'At Home' stores in prominent out-of-centre locations, as well as other traditionally 'high street'-focussed retailers such as, Next, Primark and H&M.

3.37 Even before Covid-19, however, the sector was feeling the impact of a changing market, with a slow-down in new retail parks and a general evolution from mainstream retail to more mixed-use town centre/leisure parks, and a move towards a wider mix of uses including residential. Retail Parks have felt the impact of retail store closures in much the same way as high streets; when businesses close, they close in all locations. Nevertheless, the combined effects of Covid-19 and new, more flexible planning legislation, has brought retail parks back into favour.

3.38 In January 2021, it was reported by Workman (the largest independent commercial property management and building consultancy firm in the UK) that in the five weeks to 2 January 2021, overall footfall at UK shopping destinations dropped 46% compared to the previous year; but with a drop of 50% on the high street and only 17% at retail parks.

3.39 The resilience of retail parks has led to a 'flurry' of investor acquisitions at the end of 2020, with destinations meeting the needs of suburban home workers, enabling social-distancing, offering click and collect, and more spacious environments. The strong weighting to 'essential' items also meant many could continue trading during 'lockdown'. Later sections of this report highlight the continued strength of out-of-centre retailing across the Kingston sub-region alongside wider town centre trends.

3.40 The introduction of more flexible planning regulations, including a new combined commercial Use Class E and permitted development from Use Class E to residential, makes such destinations attractive investments. Where there are no historic planning conditions restricting the overall mix on site, owners have more flexibility in respect of operator line-up and the mix of acceptable uses, with strong opportunities for increased site intensification and place-shaping visions. Opportunities for high density development and mixed-use development (to include residential) at retail parks and also out-of-town foodstore locations is clearly set out in the London Plan (2021), as discussed in Section 2.

Summary

- The role of town centres as a focus for retail remains relevant in today's market to draw in shoppers and footfall. Current thinking and research consistently repeats, however, the need to look beyond the role of retail in order to reinvent the high street, emphasising that the town centre of the future must add an extra dimension to the retail experience. Covid-19 and new planning legislation has accelerated these trends.
- Away from the high street, the composition and role of out-of-centre retail and retail parks will almost certainly evolve towards more mixed uses spaces and places as a consequence of the same factors alongside a supportive development plan policy framework.
- It is apparent that these 'extra layers/diversity of uses' are in addition to the core retail role but should be closely connected to ensure a joined-up experience within a comprehensive town centre strategy. Investment in a wider mix of land-uses and public realm/public space improvements will benefit a consolidated retail offer, leading to improved town centre footfall activity. Short-term investment projects alongside longer-term investment for major projects can have far-reaching positive benefits to the performance of a town centre.

4. Sub-Regional Context

4.1 In this section, we set out the sub-regional context within which the town centres in the borough operate. Administrative areas are not 'closed systems' and it is natural to expect a degree of expenditure inflow from beyond the borough boundary, and also expenditure leakage to the surrounding network of town centres and other shopping destinations outside the borough.

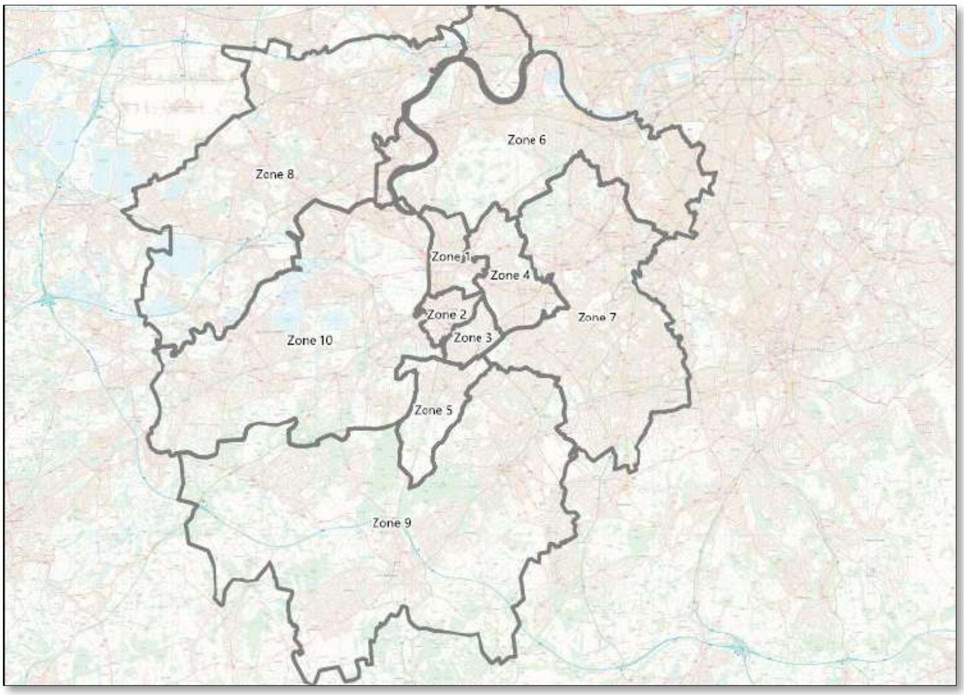
4.2 The analysis of catchment areas and trade flows form an important input to the baseline. It enables historic trend line market share data to be explored, leading to an understanding of whether the influence of a town centre in the sub-region has improved or declined over time. The data identifies catchment areas and opportunities to enhance trade draw in the future, highlighting key influences in the form of planning commitments and planned development which may enhance the market share of a competing shopping destination over the plan period.

Household Telephone Survey

4.3 A new household telephone interview survey was undertaken covering 1,000 households across 10 survey zones (Figure 4.1 below). Urban Shape designed the survey questionnaire in consultation with the Council and NEMS Market Research, who undertook the interviewing and data processing in March 2024. The survey area is shown below. Based on an analysis of shopping patterns and market shares from the 2013 Town Centre Study, some previous survey zones have been merged, but the approach does enable direct comparisons to be made and longer-term trends identified.

4.4 The analysis explores where residents living within the survey area are travelling to access different types of goods including convenience, comparison and leisure uses; this might be within or beyond the borough boundary.

Figure 4.1: Household Telephone Survey Area (2024)



2013 Town Centre Study – Overview

4.5 The April 2013 household telephone survey identified that Kingston Town Centre was retaining a very high level of trade retention within the survey area (34%) (58.2% within Core Zones 1-5), with the most dominant competing centre in terms of comparison goods trade being the West End, which had an 8% market share. The competing 'Metropolitan Centres' of Sutton, Hounslow and Croydon had market shares of 4%, 2% and 2% respectively; and the Major Centres of Wimbledon and Richmond had market shares of 5% and 4%. Each market share was substantially higher within their own respective survey zone or nearest survey zone.

4.6 At the time of the 2013 Town Centre Study, Kingston Town Centre was identified as having a very affluent catchment area and was considered as being one of the top three centres in the country in terms of strongest market potential. The Study noted that Kingston Town Centre had attracted no major retail development for twenty years, and its offer was becoming dated, while the West End and competing centres like Croydon were attracting significant new developments which would subsequently improve market share. It was highlighted that several competing town centre development schemes and retail extensions proposed could curtail Kingston's trade draw.

4.7 As noted above, in Section 2, the Town Centre Area Action Plan (2008) forecast a need for 50,000 sq m gross of additional retail floorspace to the period 2016. The Town Centre Study (2013) concluded that Kingston Town Centre could not afford to be complacent about its positioning in the sub-regional catchment area, and it was deemed critical to secure new development providing modern, quality floorspace, to improve the environment and accessibility of the centre and to evolve Kingston's wider offer if it was to retain its current position and draw. Over 10 years on, it is now necessary to revisit these conclusions as part of this up-to-date evidence base.

Change Since 2013

4.8 The up-to-date household telephone survey (2024) enables us to understand the performance of the borough's town centres in the context of the wider sub-region. The data allows us to examine the influence of competing destinations and the associated flows of retail expenditure and levels of trade retention. The data enables a direct comparison with 2013 to identify long-term trends in the context of the 2008 economic crash, Brexit, Covid-19 and international affairs including the war in Ukraine – all key events that have had substantial and direct impacts on the economy and, subsequently, high streets across the UK.

4.9 Shopping patterns derived from the Zone 1-10 household telephone survey enable us to calculate the amount of comparison goods expenditure that each competing centre/destination draws from the defined survey area. As well as the strength of the retail offer, this indicator reflects proximity and accessibility across the sub-region. The total expenditure travelling to these destinations is set out in Table 4.1 below (see also Table 5, Appendix 2). Table 4.1 compares current data with that presented in the 2013 Town Centre Study.

4.10 It is apparent that the analysis directly reflects national trends discussed above in Section 3, including the growth in online shopping alongside the ability to stay closer to home for a more limited range of shopping and leisure uses. Table 4.1 highlights the steepest fall in market share being Kingston Town Centre and London West End, the most dominant higher order shopping destinations. Whilst Kingston remains the dominant shopping destination, market share has fallen from 34.1% in 2013 to 22.1% in 2024 (-12%); and when previously the West End was the 2nd most dominant destination, it is now 5th after Kingston Town Centre, retail warehousing in New Malden (London Borough of Merton[2]; Curry's, Burlington Retail Park straddles both local authorities), Hounslow and Richmond, experiencing a fall in market share from 8.4% to 3.1% (-5.3%). Westfield Shepherd's Bush, a sub-regional shopping destination, has also seen a small decrease in market share (-0.3%).

4.11 Kingston Town Centre's market share appears to have been impacted by the growth in online shopping where people can access higher end goods; a trend that accelerated during Covid-19 when people were forced to stay at home and shops were closed for long periods of time. Alongside online shopping people are able to choose alternative shopping destinations closer to home where the offer is perhaps inferior to Kingston but online purchases are filling that void; this includes retail warehousing. Shoppers no longer need to travel to one town centre to access all of their goods in one visit and in one place; they can physically 'shop around' alongside online shopping.

4.12 It is evident from the data that competing town centres located within the Zone 1-10 Survey Area have increased their market share; including Hounslow (Zone 8, +2.4% market share) and Richmond (Zone 6, +0.7% market share). The market share of Hounslow remains considerably lower than Kingston Town Centre but has perhaps benefitted more recently from people choosing not to visit the West End and also the completion of the new town centre High Street Quarter offering over 500 new homes, a 27-storey tower, shops, restaurants and a 10-screen multiplex cinema.

Table 4.1: Study Area (Zone 1-10) Comparison Goods Expenditure Flows 2013 & 2024

	2013 Market Share %	2013 Trade Draw £m	2024 Market Share %	2024 Trade Draw £m	% Change
Kingston Metropolitan Centre	34.1%	£1, 542.8m	22.1%	£961.9m	-12.0%
Retail Warehousing New Malden	3.3%	£149.8m	4.9%	£214.9m	1.6%
Hounslow Town Centre	2.3%	£104.9m	4.7%	£205.7m	2.4%
Richmond Town Centre	3.8%	£172.2m	4.5%	£193.9m	0.7%
Central London/West End	8.4%	£381.1m	3.1%	£134.2m	-5.3%
Sutton Town Centre	4.2%	£191.7m	2.4%	£105.6m	-1.8%
Apex Retail Park, Twickenham	0.7%	£32.0m	2.2%	£95.1m	1.5%
Westfield Shepherd's Bush	2.2%	£101.4m	1.9%	£84.3m	-0.3%
Kew Retail Park	-	-	1.8%	£78.6m	-
Epsom Town Centre	2.3%	£104.6m	1.8%	£77.7m	-0.5%
Staines upon Thames	2.4%	£106.4m	1.7%	£73.2m	-0.7%
Ikea Croydon	-	-	1.4%	£62.5m	-
Priory Retail Park, Colliers Wood	-	-	1.4%	£59.2m	-
Guildford Town Centre	1.3%	£59.0m	1.4%	£58.8m	0.1%
Putney Town Centre	-	-	1.3%	£55.8m	-
Ikea Wembley	-	-	1.0%	£44.9m	-
Surbiton Town Centre	0.4%	£20.2m	0.5%	£23.5m	0.1%
New Malden Town Centre	0.9%	£40.4m	0.5%	£20.5m	-0.4%
Tolworth Town Centre	0.2%	£8.2m	0.2%	£7.4m	-
	TOTAL KINGSTON UPON THAMES		**23.3%**	**£1,014.2m**	

[2] London Borough of Merton: Halfords, Tapi Carpets, American Golf, Beverley Way; B&Q New Malden; DFS, Carpetright, Shannon Corner Retail Park; Curry's, Dreams, Burlington Retail Park.

4.13 As well as 'online trends' and 'shopping closer to home', the data also demonstrates the continued and growing popularity of retail warehousing parks. In the Kingston catchment area, New Malden retail warehousing is the 2nd most popular comparison goods shopping destination after Kingston Town Centre (£214.9m) with a growth in market share of 1.6%. Other notable destinations include the Apex Retail Park, Twickenham (£95.1m, +1.5% market share increase), Kew Retail Park (£78.6m / 1.8% market share), and Ikea Croydon (£62.5m / 1.4% market share).

Kingson-upon-Thames Borough

4.14 This section explores in greater depth shopping patterns and the market share of Kingston Town Centre across each individual survey zone; with Zone 1-5 broadly reflecting the borough boundary, and Zones 1-6 falling outside the borough boundary. We also recognise the trade draw of the three District Centres; New Malden, Surbiton and Tolworth.

4.15 Table 4.1 sets out the market share of Kingston Town Centre across each survey zone, comparing 2013 to 2024. It is evident that Kingston Town Centre has strengthened its shopping draw for comparison goods in Core Zones 1 and 4, again consistent with national trends and people choosing to shop more locally. It is also evident, however, that Kingston Town Centre has lost market share in all remaining survey zones (Zones 2, 3, 5 and 6-10) in favour of an alternative destination or a number of different destinations.

Table 4.2: Kingston Town Centre Comparison Goods Market Share 2013 & 2024, Zones 1-10

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2013	68.3%	64.0%	50.8%	52.4%	48.0%	24.8%	28.3%	29.7%	34.1%	54.6%
2024	70.9%	57.5%	42.3%	56.7%	46.2%	15.1%	16.2%	8.6%	19.7%	44.3%

4.16 Amongst the District Centres, New Malden, Surbiton and Tolworth all draw some comparison goods trade from across the survey area. Surbiton is the strongest attractor, drawing £23.5m of comparison goods expenditure; followed by New Malden (£20.5m) and then Tolworth with a substantially lower trade draw (£7.4m). These outputs endorse the findings from the town centre health checks set out in later sections; with New Malden and Surbiton having a relatively strong district centre scale comparison goods offer. In Tolworth, the comparison goods offer is more limited with fewer national multiples.

Summary

- Change since the 2013 Town Centre Study can be attributed directly to national trends, including the continued growth in online shopping where people can access higher end goods – accelerated during the Covid-19 pandemic when people were more housebound. Alongside online shopping people are able to choose alternative shopping destinations closer to home where the offer is perhaps inferior to Kingston Town Centre but online purchases are filling the void; this includes retail warehousing. Shoppers no longer need to travel to one town centre to access all their goods in one visit and in one place; they can 'shop around'.
- As a consequence, the major shopping destinations of Kingston Town Centre, London West End and Westfield, have all lost market share; and Richmond, a smaller town centre located within the

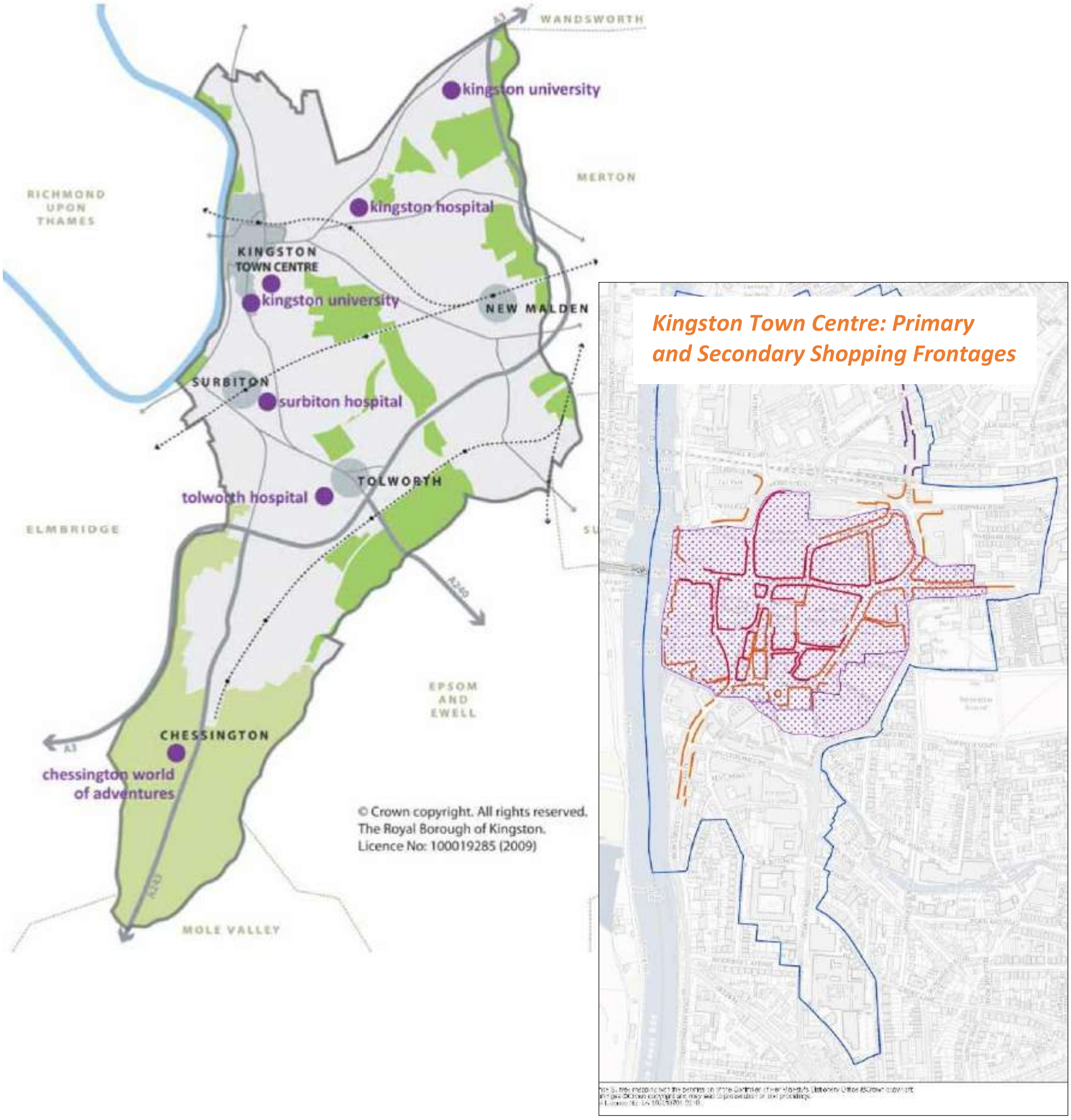
survey area, has increased market share. Hounslow is located within but near the edge of the survey area and has increased market share in this 'close proximity' core survey zone; likely driven also by the opening of the New High Street Quarter. The popularity of retail warehousing has continued and has grown in recent years, absorbing a strong proportion of available expenditure; New Malden out-of-centre floorspace is particularly popular. Amongst the District Centres, Surbiton and New Malden are the strongest comparison goods destinations, whereas Tolworth has a substantially lower market share; these conclusions are endorsed below in each respective town centre health check.

5. Kingston Town Centre

5.1 Kingston Town Centre is defined as a Metropolitan Centre in the Local Plan and London Plan, defined as follows:

- Metropolitan centres – serve wide catchments which can extend over several boroughs and into parts of the Wider South-East. Typically, they contain at least 100,000 sqm of retail, leisure and service floorspace with a significant proportion of high-order comparison goods relative to convenience goods. These centres generally have very good accessibility and significant employment, service and leisure functions. Many have important clusters of civic, public and historic buildings.

Figure 5.1: Kingston Town Centre Location Map, Core Strategy 2012



5.2 The NPPF and PPG encourage local authorities to take a leading role in promoting a positive vision for their town centres, recognising the mix and contribution of a wide range of uses. To help shape and support town centres, paragraph 002 of the PPG recommends setting out a vision and strategy for town centres as part of the development plan; and paragraph 004 adds that any strategy should be based on evidence of the current state of town centres, and sets out a range of indicators to assess the health of town centres. This section draws on this framework and provides an in-depth analysis of the health of Kingston Town Centre in order to inform our recommendations in the final section.

5.3 The Metropolitan Centre is located on the north-west boundary of the borough, adjoining the south-side of the River Thames. Kingston Town Centre has evolved from an ancient market town benefitting from a strategic position on the River Thames to a modern metropolitan centre with an extensive range of shops and services. The town plays an important sub-regional role with strong road and rail links, and extensive bus services. As a Cultural Centre, Kingston is home to Kingston Museum and Art Gallery and the Rose Theatre; and academically, Kingston University accommodates over 20,000 students. Today, it is one of London's largest and most strategic town centres.

5.4 Kingston is the largest town centre in the borough comprising 572 units centred on Clarence Street, the prime pedestrianised retail high street running east/west, but also includes John Lewis and The Bentall Centre to the north; The Rotunda Leisure venue, Travelodge Hotel and Pryzm Nightclub to the east; The Market Place, historic lanes, Rose Theatre and Council Offices to the south west, and Eden Walk Shopping Precinct and Eden Walk to the south. The Kingston 'Museum and Art Gallery', Library and former Kingfisher Leisure Centre lie south-east of Clarence Street. The River Thames boarders the west of the town centre, running north/south.

5.5 Kingston Town Centre is a major transport interchange and has the highest public transport accessibility level (PTAL) ranking available in London (6a/6b). The Metropolitan Centre is served by rail and bus services, with both train and bus stations located to the north of the town centre. Located in Zone 6, Kingston train station is located on the junction of Clarence Street and Richmond Road with a relatively dated and small-scale entrance (Figure 5.2), offering South Western Railway Services to Waterloo via Wimbledon and Richmond, Teddington and Shepperton.

Figure 5.2: Kingston Train Station Entrance

5.6 The bus station, offering an extensive bus network, is located nearby on Cromwell Road; routes stretch to Twickenham, Hounslow, Putney, Richmond, New Malden, Tolworth, Berrylands, Epsom, Ewell, Chessington, Dorking, Surbiton and Esher. The bus station is currently closed for refurbishment but is due to re-open in the coming months. The redesign is intended to improve safety and accessibility and will be greener and more energy efficient (Figure 5.3, below).

Figure 5.3: Kingston Bus Station Redevelopment – Indicative CGI

5.7 The Core Strategy (2012) sets out the vision for Kingston Town Centre (page 27), stating that it will be maintained and enhanced to provide a wide range of shops and services that will appeal to residents, visitors and tourists, and it will continue to be the economic and employment focus of the borough. The Core Strategy notes the Council's commitment to continue to develop the range of further and higher education provision through Kingston College and Kingston University and recognises the River Thames as a great asset contributing to the town being a pleasant place to live and visit. The rich history and architectural assets will be protected for future generations. Page 89 sets out the vision for Kingston Town Centre:

> *"A thriving Metropolitan Town Centre serving the needs of its catchment and providing a sustainable and enhanced range of town centre services including retail, leisure, employment, education and community facilities, as well as new homes and improved job opportunities, in a high-quality environment, that is safe, clean, and easily accessible to all.*
>
> *High quality new development will maximise the potential of vacant, outmoded and underused sites. With partners, economic growth will be supported by improved orbital transport infrastructure.*
>
> *Kingston's distinctive character, especially its historic environment and riverside, will be safeguarded and enhanced. A range of improvements to transport, access, public spaces and the natural environment will enhance its attractiveness for residents, businesses, workers, shoppers, students and visitors, in the daytime and in the evenings."*

5.8 The Local Strategy for Delivery of the Vision includes the major redevelopment of the Eden Quarter and the delivery of up to 50,000 sq m gross of additional retail floorspace by 2016 across the town centre. As set out in earlier sections, the economic context has changed substantially since this period, with a major contraction of the retail sector and residual expenditure to support new development. The original redevelopment plans and planning permission for the Eden Quarter were not taken forward, and the remainder of this report considers future retail/leisure need and strategy for Kingston Town Centre over the new Local Plan period.

5.9 The London Plan identifies opportunity for growth and development in Kingston Town Centre. Whilst it does not identify any future reclassification of the Metropolitan Centre in the town centre hierarchy, it records it as having high commercial growth potential, i.e. town centres likely to experience strategically significant levels of growth with strong demand and/or large-scale retail, leisure or office development in the pipeline and with existing or potential public transport capacity to accommodate it (typically PTAL 5-6).

5.10 The centre is also listed as having high residential growth potential, and confirms a night-time economy classification of NT2, i.e. having a strategic night-time function involving a broad mix of activity during the evening and at night including culture, leisure, entertainment, food and drink, health services and shopping. Kingston Town Centre night time economy (NT2) is recorded as being of regional or sub-regional significance. The London Plan identifies Kingston Town Centre as having mixed-use office potential; i.e. having the capacity, demand and viability to accommodate new office development, generally as part of mixed-use developments including residential use.

Newmark Retail Vitality Rankings 2024

5.11 Newmark specialises in retail estate advisory services, and publish The Vitality Rankings each year, using metrics that reflect drivers of retail health including market size, quality of retail offer and vacancy rate, for example. Kingston Town Centre has performed particularly well, and is currently ranked 5th in the Top 25 UK Town Centres after Cambridge, Cobham, Wimbledon and Sloane Street. This is an increase of 15 places from being ranked 20th in 2019.

5.12 Within the UK Large Town category, Kingston Town Centre is ranked 1st Place above Harrogate, Truro, Bromley and Shrewsbury. Kingston Town Centre, along with Chester and Cobham, are described as ‘stand out’, with each having more than tripled their 2019 ranking. The report concludes that these areas are thriving, largely due to local customers who are less impacted by cost-of-living increases, in contrast to other regions.

Diversity of Uses / Retailer Representation

5.13 Based on the latest survey by Experian Goad (April 2023) and more recent on-site surveys (2024), Kingston Town Centre comprises 183,180 sq m of retail, leisure and service floorspace across 572 units. Table 5.1 and 5.2 below set out the diversity of uses in Kingston Town Centre compared to the national average in respect of town centre composition.

5.14 The data demonstrates that the composition of the Metropolitan Centre is broadly in line with national average levels, with the proportion of comparison units and leisure services just above the national average. The vacancy rate is 0.6% below the national average.

Table 5.1: Kingston Town Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance %
Comparison	184	32.3	26.5	5.8
Convenience	41	7.2	9.3	-2.1
Financial & Business Services	37	6.5	8.4	-1.9
Leisure Services	164	28.8	25.7	3.1
Retail Services	67	11.8	15.8	-4.0
Vacant	77	13.5	14.1	-0.6
Total	**570**	**100**	**100**	**-**

Table 5.2: Kingston Town Centre Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance %
Comparison	86,930	47.5	29.7	17.8
Convenience	10,860	5.9	15.5	-9.6
Financial & Business Services	9,240	5.0	6.3	-1.3
Leisure Services	41,980	22.9	26.6	-3.7
Retail Services	7,210	3.9	7.3	-3.4
Vacant	26,960	14.7	14.0	0.7
Total	**183,180**	**100**	**100**	**-**

5.15 The proportion of convenience goods operators (7.2%) is below the national average of 9.3%, comprising 41 operators. Key foodstore operators in the town centre include a large Waitrose store at basement level in John Lewis (4,140 sq m gross), Sainsbury's supermarket Eden Walk (1,060 sq m gross), Aldi Adam's Walk (1,010 sq m gross), M&S Simply Food Clarence Street (800 sq m gross) and Tesco Express Richmon Road (280 sq m gross). The foodstores are spread across the town centre meeting the needs of shoppers, visitors and workers. Tesco Express opens until 11pm, Aldi until 10pm and Sainsbury's until 9pm. Aldi opened in February 2017, subsequent to the 2013 evidence base.

5.16 Local residents are also close to some of the strongest trading edge-of-centre Kingston foodstores, including Sainsbury's Sury Basin (4,760 sq m gross), Asda London Road (2,940 sq m gross), and Lidl Gordon Road (2,230 sq m gross). The remaining convenience goods units (36 in total) include 'bakers and confectioners' such as Ole & Steen, Paul and Gail's bakers; a small selection of newsagents around the periphery of the Primary Shopping Area including three vape shops; small convenience/food and wine shops; and four health food shops including Holland & Barrett and Food for Thought. The mix of convenience goods operators is good.

5.17 The proportion of comparison goods operators (32.3%) is 5.8% above the national average (26.5%), reflecting the town's role as a major Metropolitan Centre and shopping destination. Comprising 184 retailers in total, a more in-depth analysis highlights that 37.5% (69 operators) are clothing and footwear retailers, whilst a further 6 operators sell sports goods and clothing. The total clothing, footwear and sportswear representation is 40.8% of total comparison goods; we conclude this to be a particularly strong offer and a positive component of the Metropolitan Centre.

5.18 Operators range from budget through to high end brands and include John Lewis and Bentalls Department stores, M&S, Primark, H&M, TK Maxx, The North Face, White Stuff, Reiss, Hugo Boss, Whistles, Hobbs, Sweaty Betty, Tommy Hilfiger, Mango, Oliver Bonas, Timberland, Ghost, Swarovski, Cotswold, Benetton, and JoJo Maman Bebe. Sports retailers include Sports Direct, Nike, JD Sports, Foot Locker and Runners Need, and shoe retailers include Schuh, Clarks, Russell & Bromley, Dune, Hotter and Office.

5.19 Many of the clothing retailers are located in the Bentall Shopping Centre (Fig.5.4), accessed from Clarence Street and anchored by the Bentalls Department Store. The shopping centre accommodates around 75 stores across four floors, with over 1,000 brands ranging from fashion to homewear, and gifts to electrical items, as well as an extensive food and drink offering.

Figure 5.4: The Bentalls Shopping Centre, Kingston

5.20 Other comparison goods retailers include bookstores, charity shops, chemists, arts and crafts, cycle shops/repairs, gifts, wallpaper and paint, electrical goods and computer equipment, household furniture and jewellers.

5.21 Leisure services are also just above the national average, comprising 164 businesses. Within the category the café and restaurant sector are the largest comprising 46 units (28%) and 45 units (27%) respectively. Coffee shops include multiple representation from Costa, Caffe Nero and Starbucks, and a large number of smaller, independent café businesses are represented. The restaurant sector offers a wide range of international cuisine with many national multiple retailers including Wagamama, Pizza Express, Zizzi, Nando's, Franco Manca, and Giggling Squid. There are also public houses (11), bars/wine bars (7), amusement/leisure venues (5), betting shops (4), and fast-food take-aways (28).

5.22 Food and Beverage operators also link the main shopping area through to the river front, with a footpath adjacent to TK Maxx leading to Riverside Walk and restaurants including Bills, Cote, Busaba, Comptoir and Browns Brasserie. A number of other coffee shops and restaurants are located on Riverside Walk, but routes from the Primary Shopping Area are narrow and not well sign-posted for those new to the town centre.

5.23 Wider leisure uses include the Kingston Escape Rooms, Odeon and Curzon Cinemas, the regional Rose Theatre, PRYZM nightclub, Double Tree, Travelodge and Premier Inn Hotels, and Tenpin Bowling. A number of leisure uses are located in the Rotunda, a key leisure venue on the junction of Clarence Street and Cromwell Road offering the 15 screen Odeon Cinema, Kingston Escape Rooms, and Under 8 play centre and café, Pop Playrooms including indoor crazy golf, darts and pool tables, a David Lloyd Health Club and gym, and a number of restaurants. Overall, the leisure sector in Kingston Town Centre is strong with a wide range of activities.

5.24 There are 67 retail services, predominantly comprising health and beauty operators (69%) including beauty salons, hairdressers and barbers. There are also 2 dry cleaners, 8 opticians, a Post Office, travel agent, photographic processing, vehicle repairs and clothing alterations. The overall representation of retail services (11.8%) is below the national average (15.8%), but this is perhaps reflective of a major Metropolitan Centre which performs as a major shopping and leisure destination, rather than local everyday service needs. The financial and business sector is broadly in line with the national average, and 10 of the major high street banks are represented.

5.25 Kingston Town Centre has several 'other' town centre uses contributing to its overall vitality and viability including a large number of offices, dental and doctor surgery's, childcare nursery's, emergency services, advice centres including Citizens Advice and the Samaritans, library, churches, car parks and the museum/art gallery.

5.26 The Experian Goad Survey and on-site audit recorded 77 vacant units across Kingston Town Centre. This proportion (13.5%) is below the national average, providing further evidence in respect of the health of the town centre. The audit did record that 15 of these vacant units were 'under alteration', suggesting a strong level of new investment into the centre.

Diversity of Uses: Town Centre Change 2013-2024

5.27 Table 5.3 below, compares the town centre composition by number of units since 2013, including years 2019 (pre-Covid) and 2024, the current town centre composition discussed above.

5.28 The figures and analysis highlight the substantial fall in comparison goods operators since 2013 from 47.5% (256 operators) in 2013 to 37.5% in 2019 and again to 32.3% (184 units) in 2024. This is reflective of national trends but highlights a strong shift in composition across the town centre. In terms of floorspace, comparison goods space has fallen from 103,950 sq m gross in 2013, to 99,370 sq m gross in 2019, to 86,930 in 2024 – an overall fall of 17,020 sq m gross (16.4%) over 11 years. The data demonstrates that the downward trajectory was well established by 2019 – even before Covid-19 presented additional challenges to the High Street – and has slowed in recent years.

5.29 The loss of comparison businesses has been replaced by a mix of convenience, leisure services, retail services and vacant units. The comparison goods sector does, however, remain particularly strong in Kingston Town Centre, as set out above in the health check and composition analysis. There remains a strong representation of mid and high-end market retailers in addition to department stores and small boutique units in the historic lanes.

5.30 Total vacant floorspace has increased from 8,390 sq m gross in 2013, to 18,080 sq m gross in 2019 and again to 26,960 sq m gross in 2024; an overall increase of 8.3%. The upward trajectory has been constant over the last 11 years, but whilst the increase in vacant units appears high, the level remains below the national average. All UK town centres are experiencing a growth in vacant floorspace emphasising the need for consolidation and redevelopment, rather than major strategic retail growth.

5.31 There has been a small fall of financial and business services, but the analysis above has highlighted the continued strength of this sector, with a large number of high street banks still represented.

Table 5.3: Kingston Town Centre Composition Change 2013-2014

	2013 No. of Units	2013 % of Units	2019 No. of Units	2019 % of Units	2024 No. of Units	2024 % of Units	Change 2013-2024 (%)
Comparison	256	47.5%	217	37.5%	184	32.3%	-15.2%
Convenience	29	5.4%	39	6.7%	41	7.2%	1.8%
Financial & Business Services	43	8.0%	41	7.1%	37	6.5%	-1.5%
Leisure Services	132	24.5%	144	24.9%	164	28.8%	4.3%
Retail Services	51	9.5%	71	12.3%	67	11.8%	2.3%
Vacant	28	5.2%	67	11.6%	77	13.5%	8.3%

Convenience examples: bakers, butchers, supermarket, fishmongers, grocers, newsagent;
Comparison examples: clothing, footwear, chemist, charity, cycle shop, DIY/electrical, florist, mobile phone;
Leisure Service examples: café, bars, restaurants, hot food take-away, bars/wine bars;
Financial & Business examples: banks, building societies, estate agents, employment and careers;
Retail Service examples: dry cleaners, opticians, Post Office, health and beauty, hairdressers.

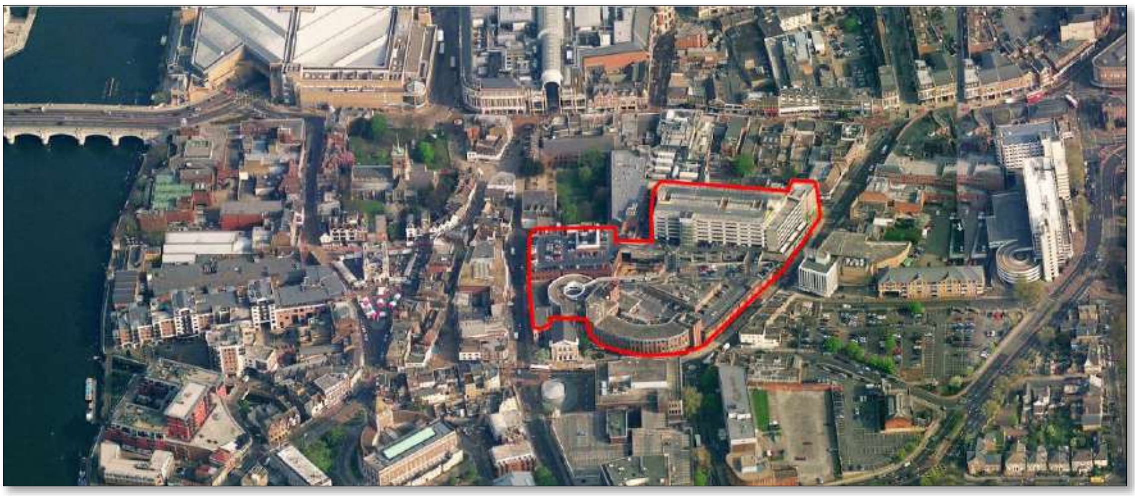
Planned Development

5.32 In December 2016, British Land and Universities Superannuation Scheme Ltd (USS) secured planning permission for the redevelopment of Eden Walk to deliver 380 homes, around 21,000 sq m of retail and leisure floorspace, 3,200 sq m of offices, and 400 public car parking spaces:

> *15/13063/FUL | The demolition and redevelopment of Eden Walk Shopping Centre, including Millennium House and Neville House to provide a mixed use development consisting of retail units and kiosks (Use Classes A1-A5), leisure including a cinema (Use Class D2), media screens, offices (Use Class B1a) and residential (Use Class C3); plant (including CHP); public and residential car parking; formation of new access for residential basement car parking, refurbishment of the existing multi-storey car park including new access ramp, extension of basement; public realm works including pedestrian routes and public spaces, improvements to Memorial Gardens, and associated works. Listed Building*

Consent for the relocation of the War Memorial to a location in Memorial Gardens, and for works abutting the United Reformed Church.

Figure 5.5: Eden Walk Site Boundary



5.33 The permission remains undeveloped, and as a consequence of more recent changing economic circumstances and volatile commercial markets, we understand that the developer is revisiting the development proposals. This has yet to reach pre-application stage.

Customer Views and Behaviour

5.34 The in-centre shopper survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centre, their likes and dislikes, and how they think Kingston Town Centre could be improved in the future. Several of the questions are multiple response, enabling the respondent to state more than one answer, and as a result some of the percentage figures are greater than 100%. The key findings are summarised below:

i. The survey results demonstrate that Kingston Town Centre has a relatively tight core catchment area, with visitors and shoppers coming from Kingston (23.6%) and Surbiton (11.8%) (35.4% in total). A further 26.2% arrive from nearby areas including Hampton, Esher, Teddington, Sutton, Epsom, New Malden, Chessington and Thames Ditton. The remaining 38.4% come from further afield across south/west London and Surrey.

ii. When asked why they chose to visit Kingston Town Centre for their shopping rather than other centres/destinations, 40.4% stated that it was 'close to home'. Other responses included the choice of goods available (7.4%), that it was near to work (5.9%), and a specific retailer (4.9%). This again reflects the tighter catchment area.

iii. The highest response when asked about the main purpose of their trip to the town centre was non-food shopping (40.4%), following by food shopping (14.3%) and work/business (7.9%). Please also note their main purpose of visiting the town centre is socialising, eating and drinking (8.8%); to access financial services (7.4%), reflective of this strong sector in Kingston Town Centre; personal services (4.4%), education (3.4%) and passing through (2.5%).

iv. When asked what else they would be doing in the town centre that day, the highest response was eating/drinking out (24.6%). This is a particularly strong vitality and viability indicator, demonstrating the high level of linked trips between shopping and eating/drinking, encouraging longer dwell times and benefitting the wider economy. Respondents also stated non-food shopping, food shopping, window shopping, socialising, visiting the market and financial services – again, reflecting linked trips between the wide range of different uses.

v. Frequency of visit reflects the role of a Metropolitan Town Centre offering higher end products, predominantly clothing and footwear. Visitation rates are lower than for district and local centres with 41.9% visiting only monthly or less often. A further 30% visit 2-3 times a month or monthly, whilst 37.4% visit weekly, 2-6 times a week or every day.

vi. An analysis of dwell time again reflects the role of a Metropolitan Town Centre offering a wide range of a goods and services, driving linked trips, and encouraging people to stay longer; 12.8% stay for over 4 hours, whilst 21.2% stay for 3-4 hours. A further 20.2% stay for 2-3 hours, 23.6% for 1-2 hours, and 21.7% for 0-1 hour.

vii. The importance of John Lewis as an anchor tenant remains relevant to the wider appeal of Kingston as a shopping destination with 21.2% stating that it was 'the' retailer that made them choose to visit Kingston Town Centre. Other operators included Primark (8.9%), M&S (7.9%), and the Bentalls Shopping Centre. These are the operators visited most frequently in Kingston Town Centre.

viii. The survey results demonstrate that the market remains a key attractor in Kingston Town Centre with 57.1% stating that they do purchase goods in the market. Within this group of shoppers, 6.9% stated that they always purchase goods in the market, 20.7% stated most of the time, 45.7% stated sometimes, and 24.1% stated rarely. They were also asked what they liked about the market, with 25% stating good food sellers, 19% stating that it was nice to support local traders, 18.1% citing the good atmosphere, 4.3% noting the quality items, and 4.3% recognising the reasonable prices.

ix. The survey results highlight that 29.6% of visitors travelled by car, 32.5% by bus, 22.7% walked, 11.8% by train, and 1.5% by bicycle. The outputs highlight a relatively good spread of transport mode.

x. The questionnaire explored car parking in the town centre with 44% parking most often in the John Lewis car park, followed by Bentalls Centre Car Park (23%), Seven Kings Way (8.6%), Q-Park Eden Walk (7.1%), and The Bittons Rose Car Park (5.7%). Their main reasons were location (55.7%) and ease of access (21.4%), followed by price (8.6%) and habit (4.3%). When parking, 82.9% stated that there was always a parking space available, and a further 8.6% stated most of the time.

xi. When asked what they liked about Kingston Town Centre, the most cited responses were the good non-food shops (39.9%), easy to get to from home (25.1%), easy to get round (22.7%), good food shops (20.7%), good cafés/restaurants/pubs (13.3%), attractive environment (11.8%), good safety and security (8.9%), and good public transport (6.4%). The variety of response is a good indication of the varied nature of Kingston Town Centre in terms of offer, goods and services.

xii. Safety and security were identified by a number of shoppers as an aspect that they didn't like, that they felt uncomfortable about, and was emphasised as something that should be improved.

Summary

- Kingston Town Centre is performing well, benefiting from an attractive environment and location on the River Thames. Its role as an ancient market town is evident in parts, and today offering a modern metropolitan centre with an extensive range of shops and services and one of the highest accessibility rankings in London. The retail offer is supplemented by a strong range of night-time economy, cultural, health, education and civic functions contributing to the customer base and strong range of town centre uses.
- Key strengths include the representation of department stores operators, a strong selection of national multiple comparison goods retailers and main foodstore operators, the historic lanes and Bentalls Shopping Centre, and an above average provision of leisure uses including a number of visitor entertainment destinations. Non-food shopping continues to drive trips to the centre and there is strong evidence of linked trips with the wide range of uses, leading to high dwell times. In respect of mix and range of goods and services, Kingston continues to perform well as a London Metropolitan Town Centre.
- The core catchment area is relatively tight including just Kingston and Surbiton; over 40% of visitors choose the centre because it's close to home. The Metropolitan Centre clearly continues to meet the varied needs of local residents and also the higher end comparison goods shopping requirements from those living further afield. The survey results highlight a relatively good spread of transport mode with around 30% travelling by car, with John Lewis and the Bentalls Centre being the most popular parking destinations due to ease of access. A substantial proportion of people noted that there was always a parking space available across Kingston Town Centre.
- Despite continuing to be above the national average, and presenting a strong mix of operator, the composition of the retail offer in Kingston Town Centre has evolved in recent years losing 17,020 sq m gross of comparison goods floorspace since 2013. This has been replaced by other categories including leisure services, retail services and convenience, as well as the vacancy rate. The level of vacant floorspace has seen a substantial increase since 2013 but remains below the national average.
- The trends present in Kingston are consistent with trends experienced across all major London Metropolitan Centres, and overall, Kingston Town Centre is displaying strong vitality and viability indicators. Future development and redevelopment proposals will need to evolve in the context of these wider trends. Whilst strategic growth of comparison goods floorspace is unlikely in the current market, the retention of comparison goods floorspace will be important to the future health of Kingston Town Centre as a sub-regional shopping destination.

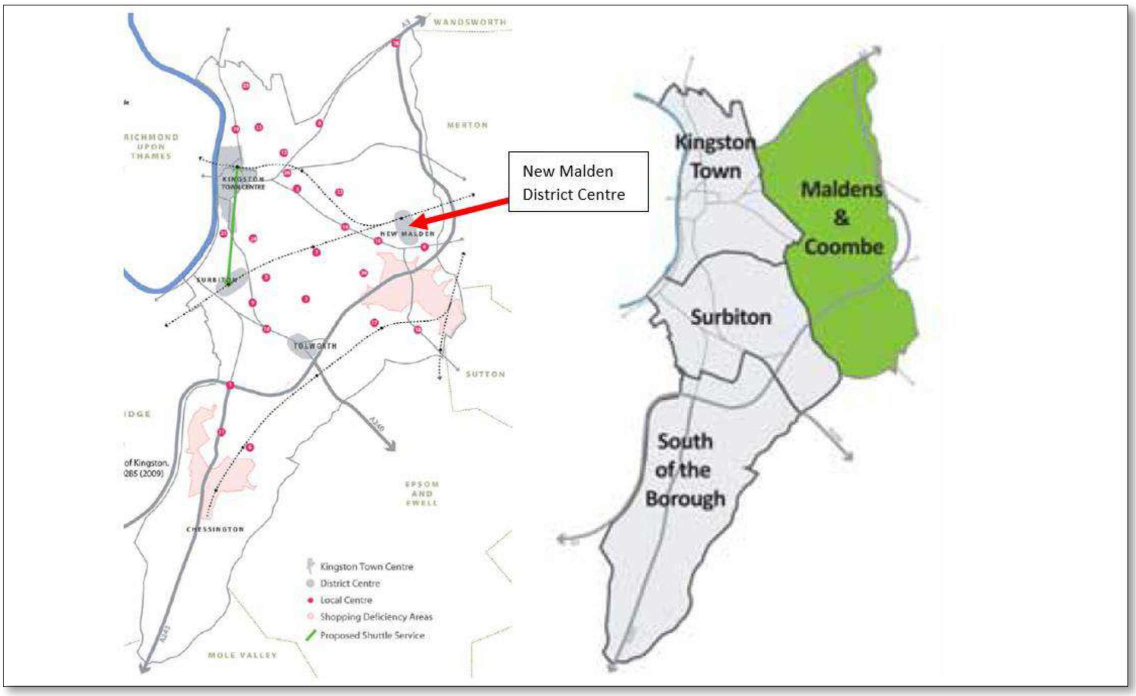
6. New Malden District Centre

6.1 The NPPF and PPG encourage local authorities to take a leading role in promoting a positive vision for their town centres, recognising the mix and contribution of a wide range of uses. To help shape and support town centres, paragraph 002 of the PPG recommends setting out a vision and strategy for town centres as part of the development plan; and paragraph 004 adds that any strategy should be based on evidence of the current state of town centres, and sets out a range of indicators to assess the health of town centres. This section draws on this framework and provides an in-depth analysis of the health of New Malden District Centre in order to inform our recommendations in the final section.

6.2 New Malden is defined as a District Centre in the Core Strategy and London Plan. It is located in the north-east of the borough, within the Maldens & Coombe Neighbourhood Area (Fig.6.1). The centre comprises 147 shop units and is the third largest town centre in the borough after Kingston and Surbiton. The retail core is predominantly linear in form running north/south along High Street from Cavendish Road in the south to Sycamore Grove in the north, and also includes a short stretch of Blagdon Road.

6.3 The town centre has a reasonably good level of accessibility, achieving a PTAL rating of 3-4. The Route 213 bus service runs through the district centre linking Norbiton, New Malden and Worcester Park, whilst the entrance to New Malden Train Station is on Coombe Road just north of the railway bridge. South Western Railway services connects New Malden (Zone 4) direct to London Waterloo, Kingston Town Centre and Surbiton train stations.

Figure 6.1: New Malden Location Plan & Neighbourhood Area



6.4 The 2012 Core Strategy sets out the vision for the Neighbourhood Area, emphasising that New Malden District Centre will be a thriving and attractive shopping destination with a good range of walk-to retail provision to meet the needs of the diverse local community. The vision highlights the planned redevelopment at Cocks Crescent and around New Malden train station, which it states will enhance the vitality of the District Centre.

6.5 Section 6 of the Core Strategy sets out the policy framework for 'Retail and Town Centres'. Paragraph 6.124 notes that New Malden has its own individual character being home to the largest expatriate Korean community in Europe, reflected by the ethnic foodstores and restaurants found on High Street. The paragraph references the small department store, Tudor Williams, but this has now permanently closed and has recently been redeveloped by Rocco Homes, delivering new residential apartments and ground floor commercial space now occupied by M&S Simply Food (opened February 2024) (Ref: 21/02865/PAMA and 21/02779/FUL). There are no Site Allocations in New Malden District Centre.

6.6 The London Plan does not identify any future reclassification of New Malden District Centre in the town centre hierarchy (Annex 1) and is recorded as having 'low' commercial growth potential, i.e. a town centre that is encouraged to pursue a policy of consolidation by making the best use of existing capacity, either due to accessibility constraints or low demand. The London Plan omits reference to night-time economy, indicating the absence of a strategic night-time function, but does recognise a 'high' level of residential growth potential. New Malden also falls within Office Guidelines Category C, 'protecting small office capacity', i.e. a centre that shows demand for existing office functions, generally within smaller units.

Figure 6.2: New Malden District Centre: Boundary and Frontages

Diversity of Uses / Retailer Representation

6.7 Based on the latest survey by Experian Goad (April 2023), New Malden District Centre comprises 33,870 sq m gross of retail, leisure and service floorspace across 147 units. Table 6.1 and 6.2 below set out the diversity of uses in New Malden District Centre compared to the national average in respect of town centre composition. The data demonstrates the strong role of leisure services in the district centre, and the relatively balanced mix of other uses and low vacancy rate. We discuss the further below.

Table 6.1: New Malden Major Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Comparison	29	19.7	26.5	-6.8
Convenience	15	10.2	9.3	0.9
Financial & Business Services	13	8.8	8.4	0.4
Leisure Services	53	36.1	25.7	10.4
Retail Services	23	15.6	15.8	-0.2
Vacant	14	9.5	14.1	-4.6
Total	**147**	**100**	**100**	**-**

Table 6.2: New Malden Major Centre Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Comparison	6,880	20.3	29.7	-9.4
Convenience	4,780	14.1	15.5	-1.4
Financial & Business Services	1,810	5.3	6.3	-1.0
Leisure Services	13,570	40.1	26.6	13.5
Retail Services	2,820	8.3	7.3	1.0
Vacant	4,010	11.8	14.0	-2.2
Total	**33,870**	**100**	**100**	**-**

6.8 The proportion of leisure services (36.1%) is above the national average of 25.7%, comprising 53 businesses. Within this category there are 18 restaurants, 14 cafés, 9 fast food takeaways, 4 sporting facilities, 3 public houses, 2 wine bars, 2 betting shops and 1 amusement arcade. Representative of the local community, New Malden has seven Korean restaurants, and a range of international cuisine including Italian, Asian, Middle Eastern, Japanese and American. In the café sector, Costa, Caffe Nero and Starbucks are all represented, but there is also a good range of quality independent businesses including, for example, Ember & Seed, Roberto, Café Galio and 601pm.

6.9 Additional leisure services include William Hill and Paddy Power betting shops, and a range of fast food takeaways including KFC, McDonalds and Domino's Pizza. The Glasshouse pub is located north of the railway line and has benefited from recent investment both internally and externally.

6.10 The Malden Centre Leisure Centre is a Council run facility located within the town centre boundary. Offering a range of facilities including swimming, swimming lessons, climbing walls, gym, and sports halls, the centre is an important part of the town centre mix for the local community. Health Clubs/Gyms including Fitness4Less – adjoining Lidl on Blagdon Road; Bounce Gym and Injury Clinic is located adjacent to Waitrose on the main High Street; and The Graham Spicer Institute (GSI) is a Charitable Trust providing local people with sports facilities and venue hire to the rear of Waitrose on Dukes Avenue. Sports at GSI include table tennis, badminton, Zumba, yoga and bridge, for example.

6.11 The second largest retail category in New Malden is the comparison goods category, comprising 29 businesses (19.7%), 6.8% below the national average. Key anchor retailers include Boots, Peacocks, Pep&Co., Shoezone, Card Factory, Poundland, F Hinds, WH Smith, Superdrug and Fonehouse. The district centre has been subject to wider national trends with both Wilko and Savers closing in recent months. Other businesses including five charity shops, sound/vision/home entertainment, leather goods, stationery, hearing aids, household textiles and carpets/flooring. The range of comparison goods in New Malden is good albeit the quality mixed.

6.12 The range of convenience goods operators in New Malden is strong, offering a Lidl, Waitrose, M&S Simply Food and Tesco Express, and supplemented with small convenience stores, a butcher, bakers, delicatessen, newsagents, and Holland & Barratt Health Food Store.

6.13 Lidl foodstore is located just off the main High Street on Blagdon Road, occupying the ground floor of the Blagdon Road multi-storey car park. Measuring 970 sq m gross, the store has a glass frontage, is open 8am-10pm Monday to Saturday and 11am-5pm Sundays and offers a fresh bakery and orange juice counter. The store shares a frontage with key footfall drivers including The Malden Leisure Centre and car park and Fitness4Less gym.

6.14 Waitrose is located further north, fronting the main High Street. Measuring 1,570 sq m gross, the store offers a wide selection of facilities including delicatessen, meat counter, patisserie, and sushi and fish counters. There is a John Lewis click & collect in-store and customer car parking with 150 spaces. Despite fronting the main High Street, the foodstore has a blank frontage on to the pavement with no visible pedestrian entrance; if arriving by foot from the High Street, shoppers are required to walk through a side alleyway adjacent to the Old Town Hall, an important and attractive historic building.

6.15 M&S Simply Food opened in February 2024 on the site of the former department store – Tudor Williams. Recently redeveloped by Rocco Homes, the development has delivered new residential apartments on the upper floors and M&S Simply Food on the ground floor (930 sq m gross). The foodstore occupies a key corner site in the heart of the High Street. Tesco Express is located on High Street just south of the railway bridge and on the ground floor of the Apex Tower. Measuring 430 sq m gross, the store has a glazed shop frontage, an ATM cash machine, Costa Express and 'Whoosh' home delivery service. The store is open 6am-11pm every day.

Figure 6.3: Image of Waitrose and Old Town Hall, High Street

6.16 There are 23 retail services in New Malden District Centre, comprising 15.6% of all uses compared to the national average of 15.8%. Businesses include 3 dry cleaners, 4 beauty salons, 8 hairdressers, 1 natural therapy, 3 opticians, 3 undertakers and a Post Office. This is a reasonably balanced mix of uses which does not dominate the wider town centre mix. Other services in the town centre include a doctor’s surgery and two health centres, funeral directors, taxi hire, the Kings Learning Centre educational tutoring, and the New Malden Methodist Church and café fronting the main High Street.

6.17 The financial and business services sector is more limited, with 13 businesses comprising 9 estate agents. New Malden also has an Accountant, Architect/Surveyor, Nationwide Building Society and Natwest Bank. The proportion of businesses (8.8%) is in line with the national average (8.4%) albeit the mix and range of service type is narrow.

6.18 There are 14 recorded vacant units (9.9% of total) in New Malden District Centre, which is substantially below the national average of 14.1%. The data also records that 4 of these units are ‘under alteration’, which suggests investment and a future planned use for these units. One such site has since been redeveloped and delivered; ‘The Fountain’ (Figure 6.4 below) sits in the south of the district centre fronting Malden Road, delivering 41 new apartments with ground floor commercial. Overall, the vacancy rate is recorded as low – only 6.8% when excluding the ‘under alteration’ units.

Figure 6.4: The Fountain, Indicative Image

Diversity of Uses: Town Centre Change 2013-2023

6.19 Table 6.3 below, compares the town centre composition by number of units since 2013. The figures and analysis highlight the fall in comparison goods businesses (-8%) since 2013 as recorded in the 2013 evidence base, but this downward trajectory is reflective of national trends. It is also not the intended role of a district centre to comprise a substantial level of comparison goods floorspace; a strong mix of other uses is more representative of their overall health and vitality and viability. Over time, since 2013, New Malden has experienced a strong growth in leisure services, and whilst the vacancy rate has increased this has remained lower than the national average.

Table 6.3: New Malden Centre Diversity of Uses by Number of Units 2013-2023

	% of Total 2013	% of Total 2023	% Change
Comparison	27.7%	19.7%	-8.0%
Convenience	11.6%	10.2%	-1.4%
Service	51.6%	60.5%	8.9%
Vacant	7.1%	9.5%	2.4%

Convenience examples: bakers, butchers, supermarket, fishmongers, grocers, newsagent;
Comparison examples: clothing, footwear, chemist, charity, cycle shop, DIY/electrical, florist, mobile phone;
Leisure Service examples: café, bars, restaurants, hot food take-away, bars/wine bars;
Financial & Business examples: banks, building societies, estate agents, employment and careers;
Retail Service examples: dry cleaners, opticians, Post Office, health and beauty, hairdressers.

Customer Views and Behaviour

6.20 The in-centre shopper survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centres, their likes and dislikes, and how they think New Malden District Centre could be improved in the future. A number of the questions are multiple response, enabling the respondent to state more than one answer, and as a result some of the percentage figures are greater than 100%. The key findings are summarised below:

i. New Malden has the most localised catchment when compared to Tolworth and Surbiton, with 84% stating that they live in New Malden. Aside from a very small percentage coming from Kingston, Worcester Park and Raynes Park, there is very little inflow of trade from beyond the New Malden area. The district centre serves predominantly the local community.

ii. The localised catchment is reflected in the frequency of visit, with 14% visiting everyday, 30% visiting 4-6 times a week, 32% visiting 2-3 times a week, and 10% visiting weekly. The overall percentage is higher than Tolworth and Surbiton. A further 10% visit monthly and the remainder less often.

iii. In terms of journey time, 58% travelled for less than 10 minutes, whilst 32% travelled for 11-20 minutes, again reflecting the localised catchment area. Mode of travel reinforces this point with 64% of people walking to the centre – the highest of all three district centres. A further 10% drive, 14% catch the bus, 6% travel by train, and 4% cycle.

iv. Similar to Tolworth and Surbiton, the nature of the town centre offer – focused on service uses and everyday shopping – is also reflected in dwell time, with 32% staying less than 30 minutes and 22% staying between 30 minutes and 1 hour. New Malden has a slightly longer dwell time that Tolworth and Surbiton with 32% staying between 1-2 hours (compared to 26% Surbiton, 15.4% Tolworth).

v. The highest response when asked about the purpose of their trip was food shopping (72%) – higher than Tolworth and Surbiton – followed by non-food shopping (22%), services (18%), eating/drinking out/socialising (18%) and work/business (8%). The convenience sector is driving frequent shopping trips, which in turn will benefit the wider shopping and service offer across the district centre. This is reinforced in a separate question asking if there is a specific retailer/shop that drives their choice to visit the centre, with the top responses being Waitrose (53.0%), M&S (26.3%) and Lidl (15.8%).

vi. The most visited shops in New Malden district centre are M&S (36%), Waitrose (32%), Lidl (32%), Poundland (16%), Charity Shops (16%), Boots (8%) and the Gym (various)(8%). This highlights the positive impact M&S Simply Food has had on the overall town centre offer. The most popular cafés include Costa (22%), Caffe Nero (18%), The Place (12%) and 63 High Street Café (8%). Favoured restaurants include Al Forno (10%), Harlem Kitchen (8%), 63 High Street Café (6%) and Nandos (4%).

vii. The reasons for 'liking' the centre are diverse, including good food shops (34%), easy to get to from home (34%), good non-food shops (20%), easy to get round (18%), good safety and security (16%), street entertainment/always lots going on (16%), and good cafés, restaurants, pubs (12%). The range of dislikes listed by respondents were more limited and fewer in number, with most citing traffic congestion (12%). Others noted the poor range of services which may reflect the high number of estate agents and absence of banks and building societies.

Summary

- New Malden is a good performing district centre located in the east of the borough. The centre has its own individual character being home to the largest expatriate Korean community in Europe. The general policy aspiration is one of consolidation rather than growth, with the town centre strategy aiming to offer a good range of walk-to retail and services to meet the needs of the diverse local community.
- Key strengths include the convenience goods sector which drives footfall, providing four main town centre anchor retailers – Lidl, Waitrose, Tesco Express and M&S Simply Food; M&S opened in February 2024 as part of the Tudor Williams redevelopment. The comparison goods sector has declined in recent years, including the loss of Wilko and Savers tracking wider national trends, but there remains a good selection of non-clothing national multiples that you would expect to see in a larger district centre.
- The range of financial and business services is more limited, dominated by estate agents, but the town centre does offer a good range of other services including the Post Office, tutoring college and doctors, for example. Alongside a strong selection of restaurants and cafés, the district centre has a particularly strong supply of gyms and leisure centres offering a wide range of sports and activities for the local community. These sporting facilities perform as key anchors in the town centre, with survey evidence demonstrating that they drive footfall and linked trips.
- The vacancy rate is particularly low, and the centre has recently benefited from two developments – the redevelopment of the former Tudor Williams Department Store and the Fountain Public House – both for residential with ground floor commercial. The recent introduction of M&S Simply Food has been a significant positive investment and has since become the most popular and visited shop in the District Centre.
- The district centre has a particularly high localised catchment area, with a high proportion walking to the centre. Frequency of visit is strong, journey time is low, and dwell time is reasonable for a district centre. Alongside the main foodstores, the charity shops and range of gyms/leisure centres were identified as key attractors; and the independent cafés and restaurants have a loyal customer base.

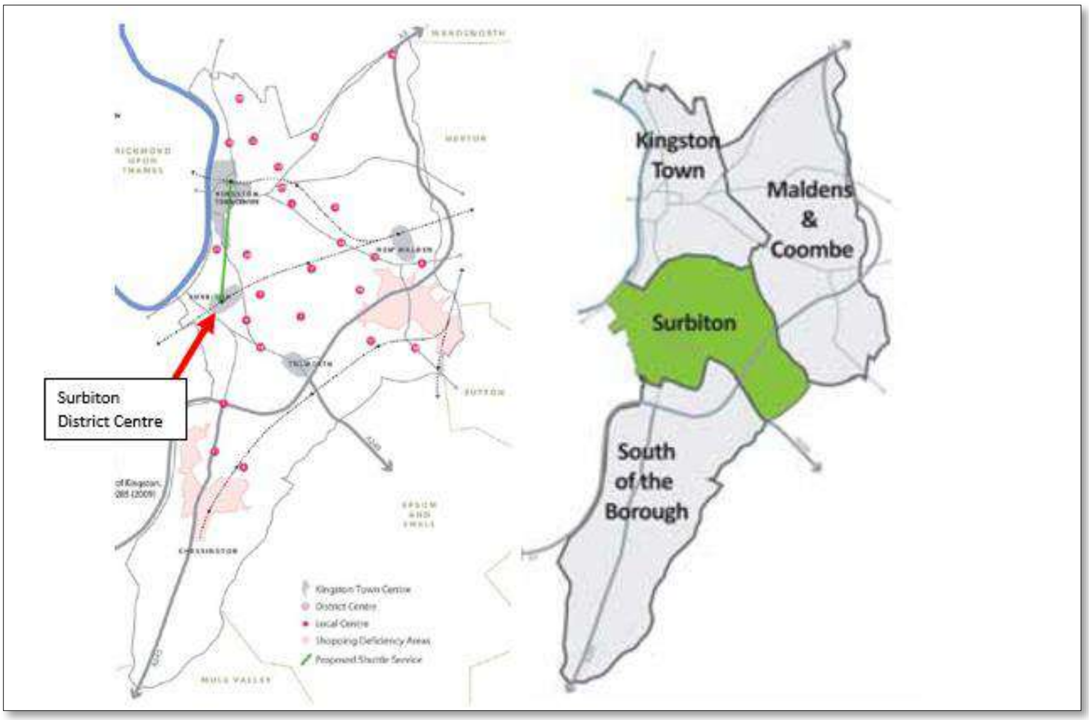
7. Surbiton District Centre

7.1 The NPPF and PPG encourage local authorities to take a leading role in promoting a positive vision for their town centres, recognising the mix and contribution of a wide range of uses. To help shape and support town centres, paragraph 002 of the PPG recommends setting out a vision and strategy for town centres as part of the development plan; and paragraph 004 adds that any strategy should be based on evidence of the current state of town centres, and sets out a range of indicators to assess the health of town centres. This section draws on this framework and provides an in-depth analysis of the health of Surbiton District Centre in order to inform our recommendations in the final section.

7.2 Surbiton is defined as a District Centre in the Core Strategy and London Plan. It is located in the west of the borough, within the Surbiton Neighbourhood Area and south of Kingston Town Centre (Fig.7.1). The centre comprises 198 shop units and is the second largest town centre in the borough after Kingston Town Centre. The retail core stretches east-west along Victoria Road and Brighton Road, and includes small sections of St James Road, Claremont Road and St Marks Hill meeting at the roundabout interchange outside Surbiton Train Station.

7.3 The town centre has a reasonably good level of accessibility, achieving an excellent PTAL rating of 5-6a around the train station, and falling to 3-4 with distance from the train station – primarily along Brighton Road. Bus routes provide a number of services linking Surbiton with Kingston to the north, Chessington, Tolworth and Epsom to the south, New Malden to the east and Esher to the west; whilst the train station – located in Zone 6 – is located centrally in the district centre.

Figure 7.1: Surbiton Location Plan & Neighbourhood Area

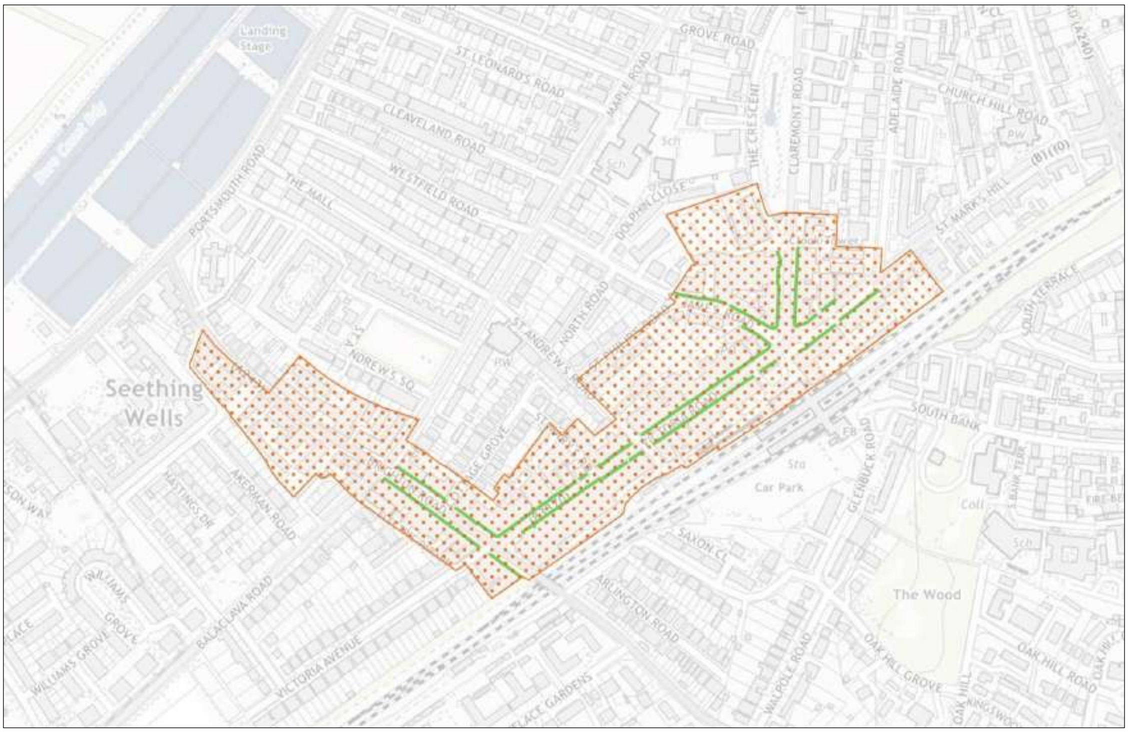


7.4 The Core Strategy sets out the Vision for the neighbourhood, stating that Surbiton District Centre will continue to be a thriving and attractive District Centre providing a range of services, leisure facilities and office-based businesses to meet the needs and aspirations of residents and visitors. The Vision seeks to enhance the district centre's facilities and services and those in the four neighbourhood local centres, including Chiltern Drive (expansion of catchment), Berrylands Road (expansion of retail or evening economy), Ewell Road North (addition of modest foodstore) and Ewell Road South (addition of suitably sized convenience store). There are no strategic site allocations in or on the edge of Surbiton District Centre.

7.5 Section 6 of the Core Strategy sets out the policy framework for 'Retail and Town Centres'. Paragraph 6.124 notes that Surbiton has a strong village feel with a reputation for being a popular home for commuters; it is well known for its bars and restaurants, particularly in the Maple Road area and has successfully begun hosting a regular Farmer's Market. Policy CS12 seeks to enhance the vitality and viability of Surbiton and remain the focus for 'walk to' services, shopping and other town centre uses of an appropriate scale, and to complement the role of Kingston Town Centre.

7.6 The London Plan does not identify any future reclassification of Surbiton District Centre in the town centre hierarchy (Annex 1) and is recorded as having 'low' commercial growth potential, i.e. a town centre that is encouraged to pursue a policy of consolidation by making the best use of existing capacity, either due to accessibility constraints or low demand. The London Plan omits reference to night-time economy, indicating the absence of a strategic night-time function, but does recognise a 'medium' level of residential growth potential. Surbiton also falls within Office Guidelines Category C, 'protecting small office capacity', i.e. a centre that shows demand for existing office functions, generally within smaller units.

Figure 7.2: Surbiton District Centre Boundary and Frontages



Diversity of Uses / Retailer Representation

7.7 Based on the latest survey by Experian Goad (April 2024), Surbiton District Centre comprises 34,900 sq m gross of retail, leisure and service floorspace across 198 units. Table 7.1 and 7.2 below set out the diversity of uses in Surbiton District Centre compared to the national average in respect of town centre composition. The data demonstrates the strong role of the convenience goods sector, financial and business services, leisure services and retail services – what you would expect in a district centre. The data also highlights a low vacancy rate compared to the national average.

Table 7.1: Surbiton District Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Comparison	37	18.7	26.5	-7.8
Convenience	19	9.6	9.3	0.3
Financial & Business Services	28	14.1	8.4	5.7
Leisure Services	54	27.3	25.7	1.6
Retail Services	39	19.7	15.8	3.9
Vacant	21	10.6	14.1	-3.5
Total	**198**	**100**	**100**	**-**

Table 7.2: Surbiton District Centre Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Comparison	6,330	18.1	29.7	-11.6
Convenience	8,170	23.4	15.5	7.9
Financial & Business Services	3,880	11.1	6.3	4.8
Leisure Services	9,440	27.0	26.6	0.4
Retail Services	4,190	12.0	7.3	4.7
Vacant	2,890	8.3	14.0	-5.7
Total	**34,900**	**100**	**100**	**-**

7.8 The proportion of convenience goods operators (9.6%) is broadly in line with the national average (9.3%) offering a good range and quality of operator, including Sainsbury's, Waitrose, M&S Simply Food, COOK and Sainsbury's Local. Additional smaller convenience goods operators and newsagents include Dee's News, First Stop, Londis, McColl's and Best-One. There are two health food shops, but aside from one delicatessen there are no independent traders such as a fishmonger, bakery, butcher or greengrocers. There are 19 businesses in total.

7.9 Sainsbury's is located at the western end of Victoria Road, close to the junction with Brighton Road. The store is open 7-days a week, 7am-10pm Monday to Friday and 10am-4pm on a Sunday, and offers a range of facilities including ATM, fresh bakery, Argos and Tu Click & Collect, and a small range of books, flowers, cards/stationery and newspaper and magazines. Measuring 1,685 sq m net, our analysis set out below confirms the foodstore is the main attractor/anchor in Surbiton District Centre.

7.10 Waitrose is located in the far east of the district centre accessed from Claremont Road. The store, measuring 1,908 sq m net, is open 7-days a week, 7-9pm Monday to Friday and 11-5pm on a

Sunday. In-store services include a dry cleaners, newsagents and flowers, and a range of counters including fish, bakery, patisserie, rotisserie, hot food and sushi. Based on the results of the in-centre shopper survey (see below), Waitrose is the second strongest anchor retailer in Surbiton District Centre.

7.11 The highest proportion of shop units in Surbiton are occupied by leisure services (27.7%), again broadly in line with the national average (26.6%). Comprising 54 units in total, the offer comprises 14 cafés, 14 restaurants, 11 fast food take-aways, 6 public houses, 3 betting shops, 2 hotel/guest houses, and 1 wine bar. In the café sector, Costa and Caffe Nero are represented but there are a large number of good quality independent businesses such as the Pickled Pantry, Soprattutto and Three Peas in a Pod. The strong number of public houses contribute well to the diversity of offer, whilst restaurants provide a range of cuisine including Italian, Thai, Japanese, Asian and American. The overall quality of offer is strong.

7.12 Retail Services are the second largest sector in the district centre, after leisure services. Comprising 39 shop units (19.7%) the offer is stronger than the national average (15.8%), albeit dominated by hair and beauty salons (25 units). There are also 5 dry cleaners, 4 opticians, 2 vehicle repair shops, Snappy Snaps photo processing, a Post Office and a funeral director. 'Other town centre uses' that provide a service to the public include dental surgeries, veterinary clinics, and a community centre on Brighton Road. The district centre offers a wide selection of everyday services to the local community.

7.13 The financial and business sector is strong. Comprising 28 units they make up 14.1% of total businesses, higher than the national average of 8.4%. This high proportion is driven predominantly by estate agents (18 in total), reflecting the strong demand from house buyers and renters. There are also four banks represented, including Natwest, Halifax, Lloyds and HSBC, and other businesses including accountants, financial advisors and a building society. Barclays recently vacated a large unit on Victoria Road. National trends demonstrate the decline in the representation of banks on the high street, so offering four of the big national banks is a positive contribution to the broader district centre offer.

7.14 As you might expect in a district centre, the proportion of comparison goods operators (18.7%) is lower than the national average (26.5%); it is not the intended role of a district centre to provide a strong comparison goods offer. Nevertheless, the centre has 37 businesses offering a wide product range including antiques, books, art, carpets, bicycles, gifts, bathroom and kitchen furniture, beds, hardware, jewellery, mobile phones, stationery, hearing aids, and camping equipment. There is a strong range of charity shops, two chemists, a florist and a pet shop. National multiple retailers include Boots, Superdrug, M&Co, Clarks, Poundland, Specsavers Hearcare and EE.

7.15 There are 21 recorded vacant units (10.6% of total) in Surbiton District Centre, which is below the national average of 14.1%. The data records that 9 of these units are 'under alteration', which suggests investment and a future planned use for these units. Vacant units are generally located to the periphery of the centre, to the west of Brighton Road and Claremont Road, with a small number to the rear of the main frontage. Overall, the vacancy rate is recorded as low – only 6.1% when excluding the 'under alteration' units.

Diversity of Uses: Town Centre Change 2013-2024

7.16 Table 7.3 below, compares the town centre composition by number of units since 2013. The key trend in recent years has been the substantial decline in the role of comparison goods retailing (-19%) and the sharp increase in retail, leisure and financial and professional services (+10.2%). The figures highlight the acceleration of national trends in Surbiton in recent years. Whilst vacant units have increased by 6.6%, the level remains below the national average.

Table 7.3: Surbiton District Centre Diversity of Uses by Number of Units 2013-2023

	% of Total 2013	% of Total 2023	% Change
Comparison	37.7%	18.7%	-19.0%
Convenience	7.4%	9.6%	2.2%
Service	50.9%	61.1%	10.2%
Vacant	4.0%	10.6%	6.6%

Convenience examples: bakers, butchers, supermarket, fishmongers, grocers, newsagent;
Comparison examples: clothing, footwear, chemist, charity, cycle shop, DIY/electrical, florist, mobile phone;
Leisure Service examples: café, bars, restaurants, hot food take-away, bars/wine bars;
Financial & Business examples: banks, building societies, estate agents, employment and careers;
Retail Service examples: dry cleaners, opticians, Post Office, health and beauty, hairdressers.

Customer Views and Behaviour

7.17 The in-centre shopper survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centres, their likes and dislikes, and how they think Surbiton District Centre could be improved in the future. A number of the questions are multiple response, enabling the respondent to state more than one answer, and as a result some of the percentage figures are greater than 100%. The key findings are summarised below:

i. The catchment area is relatively localised with 58% living in Surbiton, 10% living in Kingston, 6% living in Chessington, 6% living in Long Ditton and 4% living in Thames Ditton.

ii. A large majority of respondents visit the centre at least weekly (90%), with 18% visiting everyday, 30% 4-6 times a week, 20% 2-3 times a week, 22% once a week. This reflects the localised catchment area and also the strong diversity of uses attracting people for their day-to-day service and shopping requirements. A further 6% visit just once a month, and the remainder are 'occasional' users.

iii. In terms of journey time, 56% travelled for less than 10 minutes, whilst 38% travelled for 11-20 minutes, again reflecting the localised catchment area. Mode of travel reinforces this point with 54% of people walking to the centre, 22% travelling by car and 20% travelling by bus. Only 2% arrived by train.

iv. The nature of the town centre offer – focused on service uses and everyday shopping – is also reflected in dwell time, with 30% staying less than 30 minutes and 26% staying between 30 minutes and 1 hour. The strong diversity of uses and extensive café and restaurant offer is reflected in this data set, encouraging people to stay longer, with 26% staying between 1-2 hours. A further 16% stay for longer than 4 hours, but that is likely those who work in or near to the centre.

v. The highest response when asked about the main purpose of their trip was food shopping (44%), followed by work/business (16%), services (16%), non-food shopping (8%), and eating/drinking (4%). The convenience goods sector is clearly driving frequent shopping trips, which in turn will benefit the wider shopping and service offer. This is reinforced in a separate question asking if there is a specific retailer/shop that drives their choice to visit the centre, with the top responses being Sainsbury's (32%) and Waitrose (22%).

vi. When asked 'what else' they will be doing in the town centre today they stated food shopping (20%), non-food shopping (12%), eating/drinking (12%) and services (8%).

vii. The most visited shops driving trips to the district centre include Sainsbury's (50%), Waitrose (24%), Boots (18%), M&S (16%), Charity Shops (16%) and Poundland (14%). The most popular cafés include Cosa and Café, but other independents are also cited including Megans, The Surbitonian Grind and Pickled Pantry. Favoured restaurants including The Italian Taste, Pizza Express and Al Forno.

viii. The reasons for 'liking' the centre are diverse, including good food shops (38%), east to get around (24%), good non-food shops (22%), good public transport (22%), east to get to from home (20%), good food and beverage offer (18%), friend/good atmosphere (12%), nice environment (10%), easy to park (8%), and well maintained streets (8%).

ix. The range of dislikes listed by respondents were more limited and fewer in number, and focused on traffic congestion, cost of parking, range of non-food shops, and quality of the environment. Overall, the positive feedback was stronger.

Summary

- Surbiton is a strong performing district centre, just south of Kingston Town Centre. Benefitting from high levels of accessibility, the centre is a commuter town well known for its range of vibrant bars and restaurants. The general policy aspiration is one of consolidation rather than growth, with the overall objective being to enhance the range of facilities and services for both residents and visitors.

- Key strengths include the convenience goods sector which drives footfall, providing two of the main town centre anchor retailers – Sainsbury's and Waitrose. The comparison goods sector has experienced a strong downward trajectory, now falling below the national average but offering a diverse range of independent businesses and a small selection of key anchor national multiples. Despite the fall in overall representation, the comparison goods sector is concluded to be performing well as part of a wider district centre offering.

- The proportion and diversity of convenience, leisure services, retail services and financial/professional services has grown, ensuring a strong, useful and inclusive town centre for the local community. There is a high number of quality independent businesses across the retail and leisure service sectors contributing to customer satisfaction and loyalty. The vacancy rate remains relatively low.

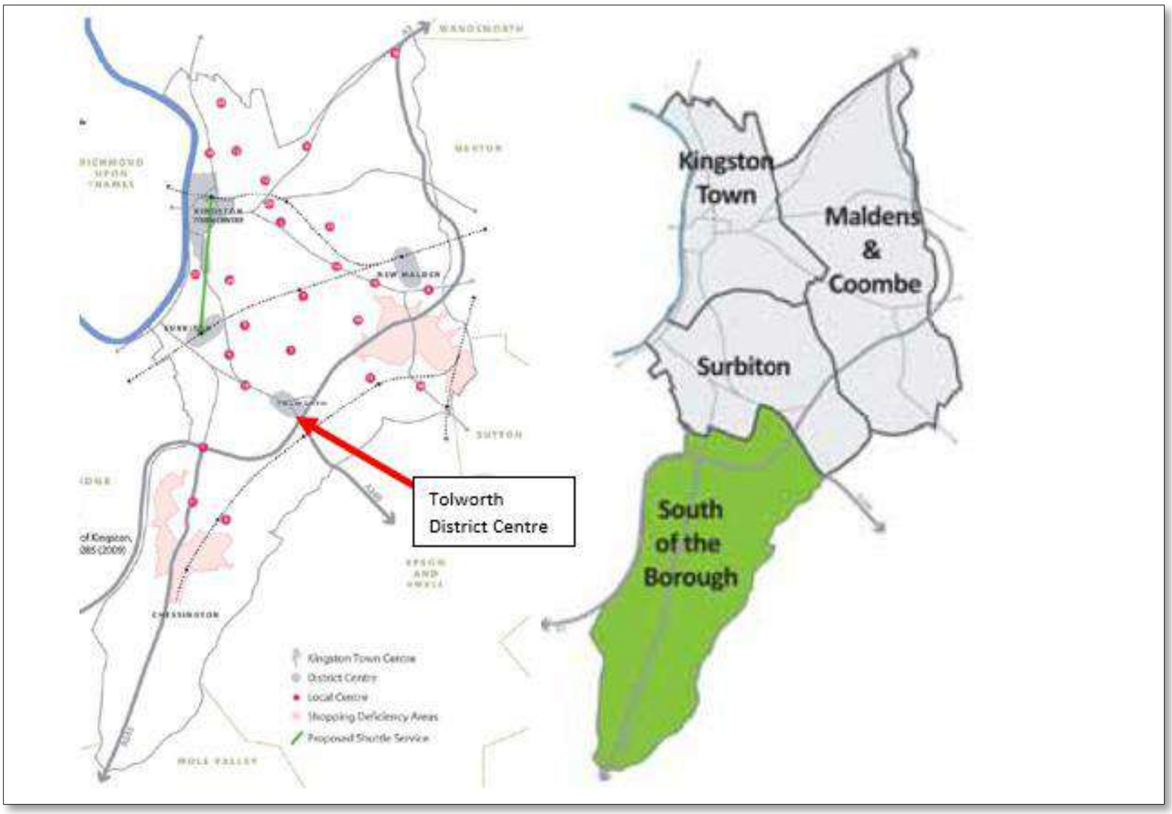
- The catchment is comprised predominantly of those living within the local area, travelling less than 20 minutes with the large majority walking. Whilst most stay for less than an hour, the diversity of uses ensure some visitors stay for between 1-2 hours. The main purpose for visiting the centre is to food shop, although there are a number of linked trips cited, and also a wide range of issues 'liked' by shoppers and visitors. Overall Surbiton is a healthy and vibrant town centre.

8. Tolworth District Centre

8.1 The NPPF and PPG encourage local authorities to take a leading role in promoting a positive vision for their town centres, recognising the mix and contribution of a wide range of uses. To help shape and support town centres, paragraph 002 of the PPG recommends setting out a vision and strategy for town centres as part of the development plan; and paragraph 004 adds that any strategy should be based on evidence of the current state of town centres and sets out a range of indicators to assess the health of town centres. This section draws on this framework and provides an in-depth analysis of the health of Tolworth District Centre in order to inform our recommendations in the final section.

8.2 Tolworth is defined as a District Centre in the Local Plan and London Plan. It is located in the southern part of the borough, referenced in the Core Strategy as 'the centre serving the South of the borough' Neighbourhood Area, but also falling on the boundary with the Surbiton Neighbourhood Area (Figure 8.1). The centre comprises 145 shop units and is the fourth largest town centre in the borough after Kingston, Surbiton and New Malden.

Figure 8.1: Tolworth Location Plan & Neighbourhood Area



8.3 The retail core stretches along The Broadway – a dual lane carriageway – from Red Lion Road in the north to the Tolworth roundabout A3 in the south, and includes an area of small business units on Tolworth Close and shops on Ewell Road running parallel to The Broadway. The district centre incorporates the 22-storey Tolworth Tower in the south of the centre (now vacant), but Tolworth train station lies outside of the district centre boundary to the south of the A3, separated by the Tolworth roundabout.

8.4 The district centre has a reasonably good level of accessibility, recording a PTAL rating of 3 across the entire district centre. Bus routes provide a number of services linking Tolworth to Surbiton, Kingston and Berrylands to the north, and Epsom, Ewell and Ruxley Lane to the south. Route 281 provides services further afield to Teddington, Twickenham and Hounslow to the north-west. The train station – located in Zone 5 – is located south of the district centre boundary offering services between London Waterloo and Chessington South with South Western Railway.

8.5 The Core Strategy (2012) sets out the Vision for the Neighbourhood, stating that residents of 'South of the borough' will enjoy better access to local services and shops, with enhanced and improved facilities at Tolworth District Centre and at the Ace of Spades, North Parade and Hook Parade Local Centres. There are no strategic site allocations in or on the edge of Tolworth District Centre.

8.6 Tolworth District Centre is located in the far north of the 'South of the borough' Neighbourhood, on the boundary. The Vision recognises the absence of a larger District Centre within the South of the borough, stating that the existing provision will be complemented by a vibrant mix of local shops and services in the most accessible locations throughout the Neighbourhood. These improved local facilities are intended to lessen the impact of a lack of dedicated district centre in the Neighbourhood.

8.7 Chapter 6 of the Core Strategy sets out the policy framework for 'Retail and Town Centres'. Paragraph 6.124 highlights that Tolworth is the smallest of the three District Centres; like New Malden, it features ethnic grocers, but those in Tolworth represent the wider Asian Communities. The text adds that The Broadway is dominated by the iconic Tolworth Tower, located on the Tolworth roundabout/A3 junction. Policy CS12 seeks to enhance the vitality and viability of Tolworth and remain the focus for 'walk to' services, shopping and other town centre uses of an appropriate scale, and to complement the role of Kingston Town Centre.

Figure 8.2: Tolworth Broadway and the Tolworth Tower

8.8 Chapter 5 of the Core Strategy focuses on the 'Key Areas of Change' including Tolworth. Paragraph 5.17 describes the district centre as stretching out along Tolworth Broadway and Ewell Road with formal shopping parades dating from the 1930's and 1950's; the 22 storey Tolworth Tower (now vacant, previously offices) at the end of the Broadway is a dominant landmark. Outside the District Centre, the prevailing character is two storey semi-detached housing with gardens and flats along the main roads and above shops.

8.9 The presence of the A3 and the A240 strategic roads and high levels of traffic is recognised in paragraph 5.18 has having a significant effect on Tolworth, acting as barriers separating the residential areas, the District Centre, Tolworth Station, leisure facilities and green spaces. At the time of the Core Strategy in 2012, pedestrian and cycle connections across the A3/A240 were poor, characterised by unpopular and unsafe pedestrian subways.

8.10 Policy T1 seeks to strengthen the vitality and viability of the District Centre through work with private sector land and property owners, and to implement a public realm and urban design strategy to restore Tolworth Broadway into a more people friendly street. This latter project was implemented in 2013/14 with the removal of the central reservation and enhanced pedestrian movement across the A3 roundabout.

8.11 The London Plan does not identify any future reclassification of Tolworth District Centre in the town centre hierarchy (Annex 1) and is recorded as having 'low' commercial growth potential, i.e. a town centre that is encouraged to pursue a policy of consolidation by making the best use of existing capacity, either due to accessibility constraints or low demand. The London Plan omits reference to night-time economy, indicating the absence of a strategic night-time function, but does recognise a 'medium' level of residential growth potential. Tolworth also falls within Office Guidelines Category C, 'protecting small office capacity', i.e. a centre that shows demand for existing office functions, generally within smaller units.

Figure 8.3: Tolworth District Centre: Boundary and Frontages

Diversity of Uses / Retailer Representation

8.12 Based on the latest survey by Experian Goad (April 2024), Tolworth District Centre comprises 22,460 sq m gross of retail, leisure and service floorspace across 145 units. Table 8.1 and 8.2 below set out the diversity of uses in Tolworth District Centre compared to the national average in respect of town centre composition. The data demonstrates the strong proportion of convenience goods, retail service and financial and business sectors, and a low vacancy rate. The proportion of comparison and leisure uses remains below the national average. We discuss this further below.

Table 8.1: Tolworth District Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Comparison	27	18.6	26.5	-7.9
Convenience	23	15.9	9.3	6.6
Financial & Business Services	14	9.7	8.4	1.3
Leisure Services	37	25.5	25.7	-0.2
Retail Services	27	18.6	15.8	2.8
Vacant	17	11.7	14.1	-2.4
Total	**145**	**100**	**100**	**-**

Table 8.2: Tolworth District Centre Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Comparison	5,020	22.4	29.7	-7.3
Convenience	5,660	25.2	15.5	9.7
Financial & Business Services	1,960	8.7	6.3	2.4
Leisure Services	5,530	24.6	26.6	-2.0
Retail Services	2,270	10.1	7.3	2.8
Vacant	2,020	9.0	14.0	-5.0
Total	**22,460**	**100**	**100**	**-**

8.13 The proportion of convenience goods operators (15.9%) is substantially above the national average (9.3%), representing 23 shop units in total. The district centre has three main foodstores including M&S Simply Food, Tesco Express and Sainsbury's Local. M&S Simply Food is located on the ground floor of the Tolworth Tower development (1,860 sq m gross), and is open 8am-9pm Monday to Saturday, and 10am-4pm on a Sunday. The store offers an ATM cash machine, Clothing and Home Click & Collect, hot food to go and travel money, and the site offers surface level and multi-storey car parking.

8.14 Tesco Express (160 sq m gross) is located in the Esso Petrol Filling Station about mid-way along the Broadway; it is open 24 hours and has an ATM cash machine and quick home delivery service for small basket purchases. Sainsbury's Local is located in the far north of the District Centre; measuring 630 sq m gross, the store is temporarily closed for refurbishment. Tolworth also has an Iceland frozen food supermarket, a Premier convenience store, four newsagents and a large selection of ethnic products across butchers, delicatessen and general grocery stores.

8.15 Tolworth has a limited comparison-goods shopping offer – largely consistent with its district centre role. The proportion of businesses (18.6%) is below the national average of 26.5%, although does represent 27 different businesses from a cross section of categories including art, carpets and flooring, chemists, charity shops, furniture, fires and fireplaces, photo products, pet shops, household goods, mobile phones, blinds and computer equipment. There are no clothing or footwear retailers, and the range of national multiples is particularly limited, comprising only Boots, Poundland and B&M Bargains. There is, however, a good range of everyday products targeted to local requirements.

8.16 The proportion of leisure service businesses (25.5%) is in line with the national average (25.7%), comprising 37 operators. The largest category comprises hot food take-away, including pizza, kebabs, burgers and chicken; there is a Domino's Pizza and Pizza GoGo, but no representation from the larger multiples (McDonalds, KFC, Burger). There are ten restaurants, mostly Italian but also including Chinese, Indian, Seafood and Thai.

8.17 Other leisure uses include a small number of cafés – including Costa – four betting shops and an Ice Cream Parlour. On the southside of the A3 is Hollywood Bowl although with its own car park and food/beverage facilities, offers little in the way of linked trips. Travelodge is located as part of the Tolworth Tower development. There are no gyms or leisure/sports facilities.

8.18 The proportion of financial and business services (9.7%) is marginally above the national average of 8.4%, but there are no consumer financial services in the form of banking. Businesses instead comprise building contractor services, doors and windows, financial advisors, various business services and estate agents. Access to everyday financial services is, however, limited.

8.19 Tolworth District Centre has 27 retail service operators, 18.6% of total units and higher than the national average of 15.8%. The mix and offer is relatively broad providing a good range of everyday services including dry cleaners, petrol filling station, beauty salons, hairdressers, natural therapies, opticians, dog grooming, undertakers, car repairs and a Post Office. Other town centre services include dental surgeries, doctors, education tutoring services, children's nursery, library and a Primary School. The broad range of shops and services across the district centre will drive footfall and linked trips.

8.20 Tolworth district centre has only 17 vacant units, representing 11.7% of total units – below the national average of 14.1%. The vacant units are scattered throughout the centre and only one is 'under alteration' suggesting a lack of demand and/or investment at the current time.

Diversity of Uses: Town Centre Change 2013-2024

8.21 Table 8.3 below, compares the town centre composition by number of units since 2013. The figures and analysis highlight substantial change in the centre over the 11-year period, with a strong decline in the proportion of comparison goods, but a equally strong increase in the proportion of convenience and service businesses. This trend is consistent with wider London and national trends and the general shift in district centres from shopping to daily services, main and top-up food shopping and eating/drinking. The vacancy rate has increased but remains below the national average.

Table 8.3: Tolworth District Centre Diversity of Uses by Number of Units 2013-2024

	% of Total 2013	% of Total 2023	% Change
Comparison	36.4%	18.6%	-17.8%
Convenience	10.9%	15.9%	5.0%
Service	44.2%	53.8%	9.6%
Vacant	7.0%	11.7%	4.7%

Convenience examples: bakers, butchers, supermarket, fishmongers, grocers, newsagent;
Comparison examples: clothing, footwear, chemist, charity, cycle shop, DIY/electrical, florist, mobile phone;
Leisure Service examples: café, bars, restaurants, hot food take-away, bars/wine bars;
Financial & Business examples: banks, building societies, estate agents, employment and careers;
Retail Service examples: dry cleaners, opticians, Post Office, health and beauty, hairdressers.

8.22 In recent years, subsequent to the 2013 Town Centre Study, Tolworth has benefited from substantial investment to the south of the district centre, in close proximity to Tolworth railway station. Lying outside the district centre boundary, new development has introduced a new Headquarters for Lidl UK, a new Premier Inn Hotel, and Signal Park – a residential development offering 1 and 2 bedroom shared ownership homes. Signal Park Phase 2 is scheduled to commence, adding further homes to the Tolworth area, and recent investment in the public realm linking Tolworth train station, and Lidl/Premier Inn and Signal Park has been implemented

Customer Views and Behaviour

8.23 The in-centre shopper survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centres, their likes and dislikes, and how they think Tolworth District Centre could be improved in the future. A number of the questions are multiple response, enabling the respondent to state more than one answer, and as a result some of the percentage figures are greater than 100%. The key findings are summarised below:

i. The catchment is relatively scattered when compared to New Malden and Surbiton, with only 46.2% saying they 'live in Tolworth'. Other home destinations include Chessington (9.6%), Surbiton (5.8%), Ewell (5.8%), and Worcester Park (3.8%) – amongst a long list. Tolworth is on a major arterial route, and the outputs indicate the level of passing trade that the district centre obtains from further afield.

ii. A large majority of respondents visit the centre at least weekly (86.5%), with 11.5% visiting everyday (the lowest of the three district centres), 25% visiting 4-6 times a week, 32.7% 2-3 times a week, and 17.3% weekly. This represents a strong frequency of visit and reflects a good mix and range of everyday shops and services attracting people into the centre regularly.

iii. In terms of journey time, 65.4% travelled for less than 10 minutes, whilst 25% travelled for 11-20 minutes. The remaining shoppers travelled between 21 and 60 minutes. Travel by car to Tolworth (59.6%) is substantially higher than either Surbiton or New Malden, and only 21.2% walk to the centre – substantially lower than either Surbiton or New Malden. A further 13.5% arrive by bus; only 1.9% arrive by train.

iv. People are spending less time in Tolworth than Surbiton or New Malden, with 67.3% staying for up to an hour, and only 15.4% staying for 1-2 hours. This perhaps reflects the more limited range of cafés and opportunity for linked trips.

v. The highest response when asked about the main purpose of their trip was food shopping (53.8%), again higher than either Surbiton or New Malden, followed by non-food shopping (15.4%), click and collect (7.7%) and food/beverage (5.8%). The convenience goods sector is clearly driving frequent shopping trips, which in turn will support the wider shopping and service offer. The separate question asking if there is a specific retailer/shop that drives their choice to visit the centre highlights M&S as the top – and only – response (34.6%).

vi. The most visited shops driving trips to the district centre include M&S (69.2%), Boots (28.8%), Poundland (15.4%), charity shops (9.6%), Iceland (7.7%), Sainsbury's (5.8%), and the Post Office and B&M Bargains (3.8%). The only cited café is Costa, and the only cited restaurants include Sunshine Café Restaurant and Particella 107. The limited response to cafes and restaurants reflects the limited choice and range of food/beverage business in Tolworth District Centre.

vii. The reasons for 'liking' the centre are limited and include easy to get to from home (17.3%), a specific retailer (13.5%), easy to get round/compact (11.5%), good non-food shops (5.8%), and good food shops (3.8%). When exploring dislikes, the outputs highlighted that the key concern was traffic congestion that made it difficult to get to by car.

viii. When asked what type of improvements they would like to see the main response was more/better shops (28.8%), followed by better cafes/restaurants (9.6%), a better road layout (9.6%), cleaner streets (9.6%), more/better car parking (9.6%), and better financial services (5.8%).

Summary

- Tolworth is a good performing district centre. Located in the centre of the borough, it is dominated by the Tolworth Tower (now a vacant office building) and the presence of the A3 and A240 strategic roads and high levels of traffic. Much time and investment has taken place in recent years to address high traffic flows and consequent barriers to pedestrian movement around the centre. The works undertaken have benefited the district centre with a substantial improvement to movement, connecting both sides of the High Street and beyond to the train station.

- The comparison goods sector has declined in representation over the last 10 years whilst the convenience food and service sector has grown. Key strengths include the convenience goods sector with three national key anchors including M&S, Sainsbury's Local and Tesco Express, supplemented with newsagents and ethnic products across numerous grocery stores. The District Centre also offer a strong range of retail services and the vacancy rate remains low.

- The comparison and leisure service sectors are more limited, with comparison goods declining substantially in recent years, albeit this is reflective of the smaller scale of centre. The range of everyday goods and services for a local catchment is good, and the addition of a petrol filling station with Tesco Express, hotel, Post Office, Library and medical/health services contribute to the vitality and viability of the centre.

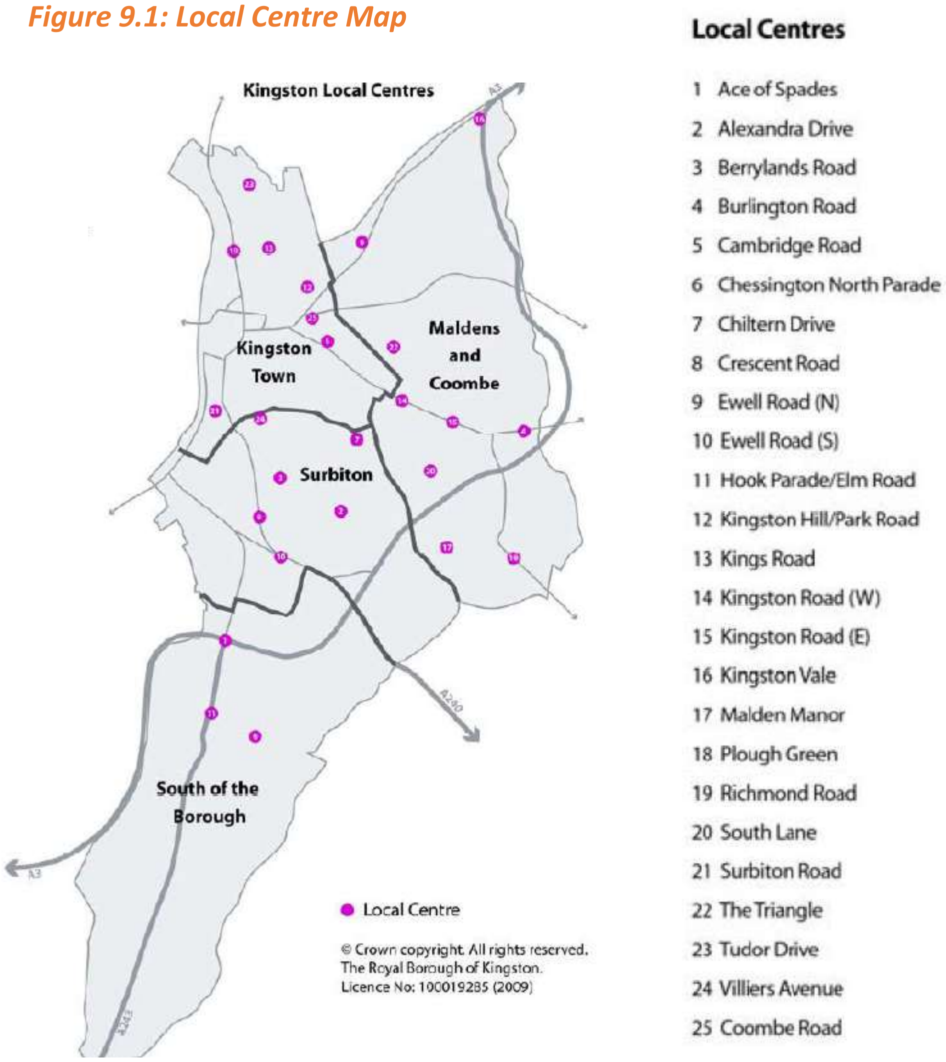
- The District Centre has a larger catchment that both New Malden and Surbiton, the number of daily visits is lower and travel by car is substantially higher. This perhaps reflects the level of passing trade on the busy highway network, and role serving those in the south of the borough – 10% live in Chessington, for example. Dwell time is lower, reflecting the more limited range of cafés and restaurants, and the M&S and click and collect service is evidently important in driving visitation rates and the health of the district centre. Costa Coffee and local restaurants Sunshine Café and Particella 107 have a loyal customer following.

9. Local Centres

9.1 This section provides an in-depth analysis of the network of Local Centres across the borough, reviewing their location and composition and overall health, and exploring the need to change policy boundaries. The NPPF sets clear guidance as to how planning policy can and should positively support neighbourhoods across the borough, providing shared and community spaces, ensuring the necessary infrastructure and facilities amongst new homes, and planning for a strong network of town centres at the heart of local communities. They are crucial in providing a focus for community, cultural and civic life.

9.2 There are currently 25 allocated Local Centres within the borough and across the four Neighbourhood Areas, as illustrated below (Figure 9.1):

Figure 9.1: Local Centre Map



9.3 Section 6 of the Core Strategy sets out the policy framework for 'Retail and Town Centres'. Paragraph 6.125 states that Local Centres in the borough provide day-to-day goods and services and adds that they are especially important to residents in the south of the borough where there is no dedicated District Centre. Policy CS 12 (c) sets out that the Council will seek to protect and enhance Local Centres (as designated on the LDF Proposals Map) and local convenience shops so that they continue to provide locally accessible goods and services. The Policy adds that units must be of a suitable scale for:

i. the size of the centre;
ii. the catchment area; and
iii. employment opportunities.

Local Centre Audit

9.4 In April 2024, an audit of all 25 Local Centres was undertaken, capturing data on different business categories, vacant units, and 'other' community uses. Site visits to each centre also observed layout, parking and the general environment and quality of the public realm.

9.5 Table 9.1 below summarises the findings, and sorts the local centres by size, from the largest (Ewell Road North, 50 units) through to the smallest (Kingston Vale, 5 units), and identifies the scale and range of offer within the Use Class land use categories. Table 9.1 identifies the Neighbourhood Area within which each local centre is located, helping to inform our discussion, conclusions and recommendations in the final section of this report.

Table 9.1: Local Centre Audit, 2024

Local Centre		No. of Units	Comp.	Conv.	Fin. & Bus.	Retail Service	Leisure Service	Health Service	Vacant
Ewell Road North	Surbiton	50	7	5	4	10	14	4	6
Ewell Road South	Surbiton	48	6	3	4	14	13	2	6
Ace of Spades	South of the Borough	47	13	4	2	12	11	0	4
Surbiton Road	Kingston and North Kingston	34	2	3	4	11	12	0	2
Burlington Road	New and Old Malden	32	6	4	2	6	12	1	1
Chiltern Drive	Surbiton	24	3	1	4	9	2	1	4
Hook Parade	South of the Borough	24	10	2	1	7	4	0	0
Kingston Road East	New and Old Malden	24	1	6	0	6	9	1	1
Coombe Road	Kingston and North Kingston	24	1	7	1	5	8	0	2
Kingston Hill/ Park Road	Kingston and North Kingston	23	5	3	4	4	5	1	1

Local Centre		No. of Units	Comp.	Conv.	Fin. & Bus.	Retail Service	Leisure Service	Health Service	Vacant
Chessington North Parade	South of the Borough	20	5	4	2	3	5	1	0
Kingston Road West	New and Old Malden	18	6	2	3	3	4	0	0
Plough Green	New and Old Malden	18	4	3	0	6	4	1	0
Richmond Road	Kingston and North Kingston	16	2	1	2	3	5	2	1
Alexandra Drive	Surbiton	16	1	3	2	6	2	0	2
Cambridge Road	Kingston and North Kingston	14	1	2	2	2	5	0	2
Malden Manor	New and Old Malden	11	1	2	0	2	5	0	1
Kings Road	Kingston and North Kingston	11	0	0	2	5	2	2	0
Berrylands Road	Surbiton	11	0	3	0	3	4	0	1
The Triangle	New and Old Malden	10	2	3	0	2	1	2	0
Villiers Avenue	Surbiton	8	1	3	0	3	1	0	0
Tudor Drive	Kingston and North Kingston	7	1	2	0	2	1	1	0
Crescent Road	Kingston and North Kingston	6	1	2	0	2	1	0	0
South Lane	New and Old Malden	6	0	1	0	4	1	0	0
Kingston Vale	Kingston and North Kingston	5	0	2	0	1	1	1	0

Ace of Spades

9.6 The Ace of Spades Local Centre is the third largest local centre in the borough, comprising 47 shop units in total (Table 9.2). It is located in the 'South of the Borough' Neighbourhood Area on the junction of the A3 and A243 Hook Road; one of three local centres serving the South of the borough. The retail frontage is dissected by the A3 fly-over, with the southern parade anchored by Londis and Ace Pharmacy, and the northern parade anchored by Tesco Express and the Shell Petrol Filling Station. Pedestrian movement is possible via crossing points, but the heavily trafficked junction is likely to deter linked trips between the two frontages.

9.7 Comparison goods businesses predominantly comprise industrial/construction type uses including insulation, construction services, tools, ceramics, tiles, shutters and carpets, for example – targeted towards trade rather than the local residential catchment. The convenience sector includes Tesco Express, Londis and two newsagents; the Retail Services sector offers a range of hair and beauty businesses and vehicular repairs and servicing; and leisure services include independent restaurants, cafés and take-aways of varying quality.

Table 9.2: Local Centre Composition – Ace of Spades (No.1)

Category	Number of Units	%
Comparison	13	28
Convenience	4	9
Retail Services	12	26
Leisure Services	11	23
Financial and Business Services	2	4
Health Services	1	2
Vacant	4	9
TOTAL	**47**	**100**

9.8 An Escape Rooms and Laser Quest are located adjacent to the Shell Petrol Station on the upper floors of Topps Tiles and the Tool Station. An Accountant and Dentist are also represented, and there are only four vacant units. Ace Parade, to the south of the A3, has dedicated on-street parking for 1 hour, but much of the Local Centre to the north forms part of the 'red route' 'no stopping at any time' zone. The Local Centre appears to trade well, but is physically disjointed and hampered by heavy traffic; the relatively large number of shop units serve both the local catchment and the trade sector, as well as passing traffic. The quality of the built environment is mixed.

Alexandra Drive

9.9 Alexandra Drive Local Centre is located in the 'Surbiton' Neighbourhood area and comprises a total of 16 shop units. The parade is situated in a residential area at the junction of Alexandra Drive and Raeburn Avenue in the centre of the borough. The retail frontage is consistent and well maintained and although the pavement is poor in sections, there are some signs of investment including seating, a bike rack and a community noticeboard.

Table 9.3: Local Centre Composition – Alexandra Drive (No.2)

Category	Number of Units	%
Comparison	1	6
Convenience	3	19
Retail Services	6	38
Leisure Services	2	13
Financial and Business Services	2	13
Health Services	0	0
Vacant	2	13
TOTAL	16	6

9.10 There is a Post Office, newsagent and Berrylands Convenience store, all providing useful services and top up food goods. A fish and chip shop, hairdresser, pharmacy and dry cleaner also serve the residents of this community while a café provides indoor and outdoor seating. A new branch of Sainsbury's Local with residential on the upper floors (image below) opened in March 2022. The store serves to anchor the local centre, but is currently outside the policy boundary, situated opposite on Raeburn Avenue. This store is a new build, open from 8am – 7pm daily and offers customers an ATM and additional parking via a designated car park to the rear.

9.11 Unrestricted on-street parking for approximately 20 vehicles exists in front of the parade with room for an additional 5 vehicles on the other side of Alexandra Drive adjacent to the green space. The centre is well served by the K2 bus route between Surbiton and Hook with two covered bus stops approximately 10 metres from the end of the parade.

Berrylands Road

9.12 Berrylands Road Local Centre is the smallest of the local centres in the 'Surbiton' Neighbourhood Area, comprising 11 shop units fronting a relatively narrow and quiet road. It is located on the section of Berrylands Road which runs perpendicular to the busy A240 linking it to King Charles Road, to the west of Surbiton District Centre.

9.13 The frontage is anchored by Londis to the end of the south side of the street and Berrylands Convenience Store on the north side. Key attractors include New World Bar, a large converted public house on the corner of Paragon Grove, a barber and a nail bar. Other services include a funeral director and the borough headquarters of the Liberal-Democrat Party. Only one unit appears to be vacant; there is no signage and no signs of investment in this unit at the current time.

Table 9.4: Local Centre Composition – Berrylands Road No.3

Category	Number of Units	%
Comparison	0	0
Convenience	3	27
Retail Services	3	27
Leisure Services	4	36
Financial and Business Services	0	0
Health Services	0	0
Vacant	1	9
TOTAL	11	100

9.14 Subject to a 20mph speed limit in this area, there is on-street parking which is limited to two hours between 8am and 6.30pm Monday – Saturday, with payment due by phone to the Ringo Parking App. Parking is charged and limited in spaces with marked bays for five cars plus one bay reserved for disabled drivers, discouraging passing vehicles to stop for any top up shopping/services. There are no bus stops in view of the centre, however Surbiton station is a ten-minute walk and the nearby A240 has bus routes linking Surbiton to Kingston. The area has renewed paving and is well lit.

Burlington Road

9.15 Burlington Road Local Centre is the fifth largest local centre in the borough, comprising 32 shop units in total of which only one was vacant at the time of survey. This urban centre is situated in the 'New and Old Malden' Neighbourhood Area the busy Burlington Road (the B282) to the west of the A3 and close to the high concentration of New Malden out-of-centre retail warehousing. Planning permission has been granted for a new out-of-centre Lidl foodstore on the Burlington Retail Park (1,324 sq m gross). This site is just outside Burlington Road Local Centre.

Table 9.5: Local Centre Composition – Burlington Road (No.4)

Category	Number of Units	%
Comparison	6	19
Convenience	4	13
Retail Services	6	19
Leisure Services	12	38
Financial and Business Services	2	6
Health Services	1	3
Vacant	1	3
TOTAL	32	100

9.16 The local centre mainly occupies the ground floor of converted residential buildings. Frontage is inconsistent and pavements are irregular and littered; there is no street furniture. There is no main anchor foodstore retailer, but instead there is a strong ethnically diverse range of retail and business, including African and Asian grocers. A high proportion of international leisure services including five restaurants, three take-aways a café and a bar are represented, predominantly offering Indian/Asian cuisine. There is also an estate agent, a travel agent, an accountant, two barbers, a hair and beauty salon, chiropodist and podiatrist and party supplies business Lux Celebrations. The mix of everyday shopping and services is limited compared to others across the borough.

9.17 Parking is free for 30 minutes, but then charged (via Ringo location) and restricted to two hours between 8am – 6.30pm Monday to Saturday with no return for two hours. There are three electric vehicle charging points, and covered bus stops at Queens Road serve routes 131, 152, 265 and N87 running from Norbiton and Tolworth to Kingston Vale and Raynes Park. Recently added signage directs vehicles to park on side streets including Queens Road and George Road. There are three charging points for electric vehicles.

Cambridge Road

9.18 Cambridge Local Centre is situated in the 'Kingston and North Kingston' Neighbourhood Area of the borough and comprises a total of 14 shop units, 12 of which are currently in use. The centre is located towards the western end of the busy A2043 road, close to Kingston Town Centre and the junction with the A308, and primarily serves residents of new build flats and major housing estates including the Cambridge Road Estate which is currently undergoing regeneration.

Table 9.6: Local Centre Composition – Cambridge Road (No.5)

Category	Number of Units	%
Comparison	1	7
Convenience	2	14
Retail Services	2	14
Leisure Services	5	36
Financial and Business Services	2	14
Health Services	0	0
Vacant	2	14
TOTAL	14	100

9.19 Cambridge Road Local Centre has no national multiple anchor convenience store, offering instead two newsagents, a vape shop, four take-aways and a café. Other services include an accountancy firm, tyre repair shop, and mobile and computer repair businesses. There are currently two vacant units. This centre is well-lit, but there is no street furniture and the shop frontage is inconsistent and rundown with little signs of investment. The mix and diversity of uses is poor.

9.20 Passing trade is hampered by a lack of parking. Opportunities to stop are limited with no parking bays along most of the route and a small section of single white line parking available between

7pm and 7am Monday – Saturday and on Sundays. The ADA Food Centre on the South side of the road offers parking for customers. It is a large unit offering a good convenience goods product range and forms part of the main shop frontage, but currently falls just outside the local centre policy boundary.

9.21 Bus stops on the 131 and N87 routes between New Malden and Kingston include the Vicarage Road covered stop serving the 131 and N87 and the Station Road post serving the K2, K3, K4 and K5 routes.

Chessington North Parade

9.22 Chessington North Parade Local Centre comprises 20 shop units in total. It is located in the 'South of the Borough' Neighbourhood Area just off Bridge Road, a major route between Chessington and Epsom and Ewell; it is one of three local centres serving the South of the borough. The Local Centre is a quiet street serving only the retail parade on one side and residential opposite; it is a vibrant centre with a strong mix of retail and service facilities serving local needs well.

9.23 The parade is anchored by Morrison's Daily and Sainsbury's, while the Western side has a Premier Express convenience store. Both anchor stores offer a selection of services including ATMs, bakery and Costa Coffee to go. Morrison's also has a Post Office and phone top up. Opening times are 6am -10pm Mon – Sat and 7am – 10pm on Sunday. Sainsbury's Local opens 7am – 10pm.

9.24 Leisure services include a bakery, a café and KFC hot food take-away; and comparison goods operators include Boots Pharmacy, a flooring and tiling business and a small selection of charity shops. There are two betting shops. Other services include a barber, a beauty salon, funeral director, and a veterinary surgery.

Table 9.7: Local Centre Composition – Chessington North Parade (No.6)

Category	Number of Units	
Comparison	5	25
Convenience	4	20
Retail Services	3	15
Leisure Services	5	25
Financial and Business Services	2	10
Health Services	1	5
Vacant	0	0
TOTAL	20	100

9.25 The centre is well served by public transport, with routes 71 and N65 between Chessington and Surbiton accessible via covered bus stops on the main road. It is also directly adjacent to the entrance to Chessington Station with trains running on a direct line into central London. There is ample, free, on-street unlimited parking (with the exception of 1 – 1.30pm Mon-Friday) for around 32 vehicles along the Eastern side of the parade plus two disabled spaces and 1 electric charging point. The Western side has space for a further 10 vehicles including one disabled bay.

9.26 Wide, even pavements give ease of movement for pedestrians while benches, bike racks, a phone box and a post box are also provided. Other signs of investment include considered planting, new advertising banners and signage for ULEZ and warning motorists against 'idling' engines.

Chiltern Drive

9.27 Chiltern Drive Local Centre is located in the 'Surbiton' Neighbourhood area of the borough, with a total of 24 units – four of which are currently vacant. The centre occupies both sides of a short drive which is anchored at the top by The Berrylands pub and at the bottom by Stuart's newsagent. This is a quiet centre sitting within a residential area; however footfall is boosted by those passing to and from Berrylands Railway Station, the entrance to which sits at the end of the street. It is a generally attractive environment with well-kept shop fronts, and enhanced by established trees and hanging baskets, however street furniture is lacking.

Table 9.8: Local Centre Composition – Chiltern Drive (No.7)

Category	Number of Units	%
Comparison	3	13
Convenience	1	4
Retail Services	9	38
Leisure Services	2	8
Financial and Business Services	4	17
Health Services	1	4
Vacant	4	17
TOTAL	24	100

9.28 Comparison businesses here include a fabric store, a florist and a gift shop. Retail Services are predominantly hair & beauty salons while Financial and Business Services include two estate agents, a financial advisor and a construction company. Other attractors include a café and a health and fitness studio offering pilates classes. There is free on-street parking for approximately 19 vehicles plus two bays with electric charging points. Parking is restricted only between 1pm and 2pm Monday to Friday.

Crescent Road

9.29 Crescent Road Local Centre is the second smallest centre in the borough, comprising just six shop units in total. It is located in the 'Kingston and North Kingston' Neighbourhood Area off Kingston Hill which is served by covered bus stops offering the K3 and K85 routes between Kingston and Roehampton, and the KU1 and KU3 routes serving Kingston University.

9.30 This small, quiet local centre serves residents of the housing blocks directly opposite, plus the community in surrounding roads. The offer is limited to two newsagents, a café, a hairdresser and a dry cleaner. Comparison is limited to a specialist niche bridal and evening wear boutique.

There is little greenery and some signs of graffiti on shutters, but the area is generally tidy with a community noticeboard.

9.31 An off-street layby in front of the parade offers an hour's free parking with no return within 2 hours between Monday – Saturday from 8.30am – 6.30am. This is limited to five to six vehicles. On the opposite side of Crescent Road there is additional parking (Ringo Parking App) for around five cars; from Mon – Fri between 10am and 3.30pm motorists can park for four hours, with no return within two hours.

Table 9.9: Local Centre Composition – Crescent Road (No. 8)

Category	Number of Units	%
Comparison	1	17
Convenience	2	33
Retail Services	2	33
Leisure Services	1	17
Financial and Business Services	0	0
Health Services	0	0
Vacant	0	0
TOTAL	6	100

Ewell Road North

9.32 Ewell Road North Local Centre is the largest local centre in the borough comprising 50 shop units, 44 of which are currently in use. This busy local centre is located in the 'Surbiton' Neighbourhood area on the A240 - the main route between Kingston and Tolworth. The centre is interrupted in sections by residential dwellings and is anchored on the West side by the Surbiton Local Convenience Store and on the East side by Sainsbury's Local which is open from 7am – 11pm daily and offers a bakery and coffee to go plus an Argos Collect service.

Table 9.10: Local Centre Composition – Ewell Road North (No.9)

Category	Number of Units	%
Comparison	7	14
Convenience	5	10
Retail Services	10	20
Leisure Services	14	28
Financial and Business Services	4	8
Health Services	4	8
Vacant	6	12
TOTAL	50	100

9.33 Leisure services are well represented with three cafés, three restaurants and a takeaway; and key attractors include 'The Prince of Wales' pub and 'Langley's' bar. In addition to several CTN and convenience stores, Kingston Green Supermarket offers organic groceries, and there is also a pharmacy, patisserie and butcher, plus a sizeable furniture store. Other useful services include hair and beauty salons, massage therapy, dry cleaning. There are dental and medical clinics and financial and business services in the form of a solicitor, estate agent and building and design company. The mix and range of offer is good, and this local centre clearly performs a strategic role in this part of the borough for everyday shops and services.

9.34 There are parking bays on both sides of the road for around 13 cars, plus two disabled bays, but heavy traffic means these are often occupied and manoeuvring is difficult. Parking restrictions Mon – Fri 8.30am – 6.30pm is for two hours with no return within two hours (Ringo Parking App). Visitors do however benefit from the boroughs 30 mins free parking scheme.

9.35 The centre has covered bus stops on both sides with buses running on the 281, 416 and 418 routes between Kingston and Tolworth. Surbiton mainline station is a 15 – 20-minute walk. Although urban with no planting, the pavements are in good order, it is well lit and there is a clearly-signed cycle lane running the length of this centre. There is a general feeling of safety here.

Ewell Road South

9.36 Ewell Road South Local Centre is the joint second largest in the borough comprising 47 shop units, 6 of which are vacant. Like Ewell Road North, this busy local centre is located in the 'Surbiton' Neighbourhood area on the A240, the main route between Kingston and Tolworth, and is around half a mile from Ewell Road North Local Centre.

Table 9.11: Local Centre Composition – Ewell Road South (No.10)

Category	Number of Units	%
Comparison	6	13
Convenience	3	6
Retail Services	14	29
Leisure Services	13	27
Financial and Business Services	4	8
Health Services	2	4
Vacant	6	13
TOTAL	48	100

9.37 A key attractor on the north side of the centre is The Royal Oak Pub, and the centre is anchored by a Co-op store, open 7am – 11pm daily and offering an ATM, bakery and Costa Coffee Express. A car park at the rear offers 5 spaces with one hour's free parking for customers. The convenience sector offers the Co-op foodstore, Polish grocer and a CTN newsagent; the mix is particularly limited given the size of the centre. Dominant uses instead include leisure and retail services.

9.38 Leisure services include independent restaurants, cafés and takeaways, while the retail services are heavily dominated by hair and beauty and massage therapy businesses (10 units). Other notable businesses serving the community include a chiropractor, solicitor, and opticians.

9.39 On-street parking is limited, with room for 4 – 5 vehicles on each side of the road. Parking regulations are not well sign-posted but appear to be 8.30am – 6.30am Monday - Saturday with payment via Ringo Parking App. There are two spaces for disabled parking. The centre is also accessible via bus with covered stops at Hollyfield Road and Broomfield Road serving the 282, 406 and 418 routes between Kingston and Tolworth. Surbiton railway station is a 20-minute walk.

9.40 Some uses form part of the retail frontage but lie outside the Local Centre policy Boundary. 'Up & Running', a destination business serving the fitness community with its own off-road parking bays is located opposite the Co-op; and the adjacent Monkey Puzzle Nursery currently sit outside the boundary.

9.41 Although signage is inconsistent and the centre is unkempt, littered and with some graffiti on shutters and brickwork this is a main thoroughfare with a general feeling of safety given footfall and passing traffic. The pavements are in good condition, there is seating, a new phone kiosk and a post box.

Hook Parade

9.42 Hook Parade Local Centre comprises 24 shop units, making it the second largest centre in the 'South of the Borough' Neighbourhood area of the borough. It is one of three local centres serving the South of the borough. The purpose-built retail frontage is dissected by the heavily trafficked A243, however a pedestrian crossing allows users linked trips between the two frontages. The Eastern parade is anchored by Tesco Express and the Western parade by Greggs and Sainsbury's Local. Both stores offer ATMs and multiple services including coffee to go and a post office; they open seven days a week. Tesco's opening hours are 6am – 11pm and Sainsbury's opens an hour later to midnight.

Table 9.12: Local Centre Composition – Hook Parade (No.11)

Category	Number of Units	%
Comparison	10	42
Convenience	2	8
Retail Services	7	29
Leisure Services	4	17
Financial and Business Services	1	4
Health Services	0	0
Vacant	0	0
TOTAL	24	100

9.43 Comparison goods retailers include house clearance, florist, a tailor and an optician. Leisure services comprise independent businesses including a pizza restaurant, three take-aways and a café, and other services include several hair and beauty salons, an estate agent, dry cleaner and a launderette. There is a large Post Office sorting and delivery office on the corner and Little Peeps soft play centre on the Western parade serves as a meeting point for the community. The Lucky Rover pub and adjoining funeral director form part of the main retail frontage but currently sits just outside the centres policy boundary.

9.44 There is ample free, unrestricted on street parking with 18 spaces plus one disabled bay on the Western parade, plus a car park managed by Euro Car Parks behind Sainsbury's which offers 30 mins free parking to customers with a maximum stay of 30 minutes. Parking outside the Eastern side of the centre is on the same terms for around 31 vehicles with an additional disabled spot and three electric vehicle charging points. Parking provision encourages trips to the local centre, contributing to footfall and overall vitality.

9.45 In terms of the environment there is no green space or sympathetic planting, however there are various signs of careful investment, including community notice boards, ad banners, a functioning water fountain, refuse bins and benches. Covered bus stops with digital signage serve the 71, 465, 467, K2, K4 and N65 routes between Dorking, Leatherhead and Surbiton and Kingston.

Kingston Hill Park Road

9.46 Kingston Hill/Park Road Local Centre comprises 23 shop units. It is situated in the north of the borough within the 'Kingston and North Kingston' Neighbourhood area and is positioned around a five way roundabout fed by the busy A308. The Local Centre is split into two parts either side of the roundabout, which breaks up the shop frontage. The centre is anchored by a Shell Garage between the A308 and Clifton Road which houses a Little Waitrose, this is open between 6am and 11pm daily and offers an ATM, a bakery, deli and Costa Coffee.

Table 9.13: Local Centre Composition – Kingston Hill Park Road (No.12)

Category	Number of Units	%
Comparison	5	22
Convenience	3	13
Retail Services	4	17
Leisure Services	5	22
Financial and Business Services	4	17
Health Services	1	4
Vacant	1	4
TOTAL	23	100

9.47 In addition to the petrol filling station and wine wholesaler, comparison goods businesses comprise a framing service, and kitchen worktop and bathroom fittings suppliers. The convenience sector includes an off-licence and newsagent, alongside the Little Waitrose; the Retail Services sector offers hair and beauty businesses, a dry cleaner and vehicular repairs and servicing; and leisure services comprise restaurants, cafés and take-aways, including Domino's and Papa Johns. A dental practice and two estate agents also serve local residents. Overall, the mix and range of goods and services is good.

9.48 Opposite, between the A308 and Manorgate Road lies The Black Horse, a busy pub with an outside garden but no dedicated parking. This is currently not within the Local Centre policy boundary but does sit with the main retail frontage. The retail frontage located on Kingston Hill is busy and well-lit with a pleasant environment, including lights strung in trees. Park Road is more rundown with uneven pavement and some graffiti. Despite heavy traffic and the roundabout, pedestrian crossings assist pedestrian connectivity between the different sections of this Local Centre.

9.49 Parking throughout the local centre is limited with bays for 3 to 4 vehicles outside Domino's on Kingston Hill (Mon – Sat 8.30am – 6.30pm, 4 hours parking no return within 2 hours, payment by Ringo Parking App). On Park Road the 4 spaces are subject to restrictions of 20 minutes, no return within 1 hour, in the same time period and with payment as before. Three electric vehicle charging points are on Clifton Road by the filling station. Wine wholesaler Majestic has underground customer carparking for 6 – 8 vehicles, accessible via Burnham Street.

9.50 The centre is well-served by bus routes 57, 85, 213, 371, KU1 and KU3 between Kingston, Kingston Vale and New Malden or Raynes Park. There is a covered bus stop opposite Merit Tyres and a stop outside Bathstore.

Kings Road

9.51 Kings Road Local Centre is a small centre comprising 11 shop units in the far north of the borough and within the 'Kingston and North Kingston' Neighbourhood Area. The centre is on a residential street, in three sections, with the first located between Burton Road and Chesterfield Road, the second between Chesterfield and Stanton Road and the third between Stanton Road and The Keep. There were no vacant units at the time of on-site survey.

9.52 The range and mix of goods is relatively limited and there is no significant anchor store or supermarket; and there are no convenience or comparison goods operators. We understand that a Co-Op convenience store once anchored the Local Centre, but this has since closed, and the closest store is now just outside the Local Centre to the east on King's Road. Uses in King's Road Local Centre include a take-away and a café, hair and beauty salons, a dry cleaner and Co-Op Funeral Director. Financial and Business services include a chartered accountants and estate agent, and there is also a veterinary practice. The mix and range of goods does not meet the needs of the local walk-in population given the absence of useful everyday shops.

Table 9.14: Local Centre Composition – Kings Road (No.13)

Category	Number of Units	%
Comparison	0	0
Convenience	0	0
Retail Services	5	45
Leisure Services	2	18
Financial and Business Services	2	18
Health Services	2	18
Vacant	0	0
TOTAL	11	100

9.53 This quiet, residential street is well lit and very neat, with consistently new signage and regular pavements. At the time of survey, it was not served by buses which were on diversion. Parking directly in front of the parade is in six bays, restricted between 8.30am and 6.30pm Monday – Saturday with the sections outside Boho limited to 4 hours with no return within 2 hours. The section outside Kaza has a maximum stay of 20 minutes, no return within the hour. Unrestricted parking is available is on the other side of the road between 6.30pm and 8.30am Monday – Saturday and all day on Sundays. There is an electric charging point for one car.

Kingston Road West

9.54 Kingston Road West Local Centre is located towards the centre of the borough, in the 'New and Old Malden' Neighbourhood Area. Being one of a number of local centres on the A2043, Kingston Road West is located on the south side in four segments between Dunbar Road and California Road. Comprising 18 units, all were in use at the time of survey. Although signage is poor, pavements are in relatively good order and there are signs of investment such as a new community noticeboard and benches. There is no anchor store within the Local Centre boundary, but a full-sized Aldi foodstore lies on the North side, opposite the Madeira Street Café.

Table 9.15: Local Centre Composition – Kingston Road West (No.14)

Category	Number of Units	%
Comparison	6	33
Convenience	2	11
Retail Services	3	17
Leisure Services	4	22
Financial and Business Services	3	17
Health Services	0	0
Vacant	0	0
TOTAL	18	100

9.55 Comparison businesses here mainly serve trade rather than residents and include flooring specialists, safety-wear and trade tools retailers and decorator's equipment. There are two convenience stores including an off-licence and CTN newsagent. Retail services include hair and beauty, and leisure services comprise two cafés and two independent restaurants. Other uses include accountants and solicitors. Overall, the mix of uses is limited in terms of meeting local everyday shopping and service needs, but the adjoining Aldi substantially enhances the overall offer. The A2043 is a busy main road with lots of through traffic. Parking is encouraged on side road where there is 2 hours free parking (no return within 2 hours) Mon – Sat 8am – 6.30pm and Sunday 11am – 5pm. The centre is served by the 131, AP1, K5 and N87 bus routes and there is a covered stop at Springfield Place.

Kingston Road East

9.56 Lying to the east of Kingston Road West, Kingston Road East Local Centre is also located in the 'New and Old Malden' Neighbourhood Area. This centre runs on the North side of the A2043 in segments between Elm Road and Montem Road and comprises a total of 24 units with only one vacant.

9.57 The local centre is anchored by Londis and there is an eclectic mix of stores offering ethnic foods such as halal butchers and Korean food. Leisure services comprise several restaurants, two take-aways and cafés, and other services include a pet grooming service, dry cleaner, hair and beauty salons and a martial arts studio.

Table 9.16: Local Centre Composition – Kingston Road East (No.15)

Category	Number of Units	%
Comparison	1	4
Convenience	6	25
Retail Services	6	25
Leisure Services	9	38
Financial and Business Services	0	0
Health Services	1	4
Vacant	1	4
TOTAL	24	100

9.58 Signage is generally inconsistent and outdated in appearance, the pavements are uneven and there is visible graffiti in a number of places. The A2043 is a busy main road with high levels of through traffic. Parking for 10-14 vehicles is available on-street in marked bays and for 10 – 14 vehicles. Restrictions are 1 hour's free parking Mon-Sat 8.30-6.30am with no return within 2 hours. The centre is served by the 131 and N87 bus routes and there is a covered stop at Elm Road.

Kingston Vale

9.59 Kingston Vale is the smallest Local Centre in the borough and is located in the 'Kingston and North Kingston' Neighbourhood Area on the A308, metres from the junction with the A3. It is the most northerly of the local centres in the borough. This small, quiet purpose-built parade comprises five ground-floor units all of which are in use and anchored by the Vale Store CTN which has Post Office services.

9.60 In addition to the newsagent there is also a patisserie, restaurant, dry cleaner and dental practice, together offering a useful destination for small-scale everyday requirements. The area feels safe, is generally tidy and features two new planters, a community noticeboard, post box and bike racks.

9.61 Public transport to the local centre is by bus between Kingston and Roehampton/Putney with covered stops within 100 metres on the main road serving routes 85 and K3. Parking in surrounding streets is subject to Resident Parking permits however passing trade can make use of off-street parking directly in front of the retail frontage. There are marked bays for six vehicles offering 30 minutes free parking Mon-Sat 8am-7pm, no return within 2 hours.

Table 9.17: Local Centre Composition – Kingston Vale (No.16)

Category	Number of Units	%
Comparison	0	0
Convenience	2	40
Retail Services	1	20
Leisure Services	1	20
Financial and Business Services	0	0
Health Services	1	20
Vacant	0	0
TOTAL	5	100

Malden Manor

9.62 Malden Manor Local Centre is located on a roundabout feeding Manor Drive North and Sheephouse Way in the 'New and Old Malden' Neighbourhood Area. Comprising 11 units in total, this parade is anchored by two convenience stores - the Manor Express newsagent and Old Malden Food & Wine grocer and off-licence. A busy Co-op convenience store sits across the road at the entrance to Sheephouse Way, but this currently sits outside the Local Centre policy boundary. The store is open 7am-11pm daily and appeared busy on the day of the site visit.

Table 9.18: Local Centre Composition – Malden Manor West (No.17)

Category	Number of Units	%
Comparison	1	9
Convenience	2	18
Retail Services	2	18
Leisure Services	5	45
Financial and Business Services	0	0
Health Services	0	0
Vacant	1	9
TOTAL	11	100

9.63 The local centre has a good small-scale mix of uses, offering a pharmacy, and leisure services including a café, three take-away outlets and a restaurant. A hair and beauty business, veterinary practice and day nursery also serve the surrounding community.

9.64 Multiple public transport links serve this site, with covered bus stops directly opposite the shops and on Manor Drive North offering the K1 route between Tolworth and New Malden. Malden Manor Railway Station is located next to the Co-op convenience store offering a mainline route into London. Although small, this Local Centre is busy and has signs of investment including bike racks and a bench celebrating Queen Elizabeth II's Platinum Jubilee.

9.65 The retail frontage is set back from the roundabout with a layby allowing parking for 7 cars in allocated bays, including one for disabled drivers. Parking is free but restricted to 2 hours with no return within an hour Mon-Sat 8am-6pm. Drivers also make us of marked bays around certain sections of the roundabout itself.

Plough Green

9.66 Plough Green Local Centre comprises 18 shop units, located in the 'New and Old Malden' Neighbourhood Area on the busy A2043 (or Lower Malden Road) at the junction with the B284. The local centre runs on one side of the road and is attractive and well-maintained in appearance; it is located close to the London Borough of Sutton and in close proximity to Worcester Park High Street.

9.67 The local centre is anchored by a Tesco Express (open 7am-11pm daily and offering an ATM, bakery and Costa); the store benefits from both passing trade and the custom of local residents, helped by linked trips to the wider shopping and service offer. There is also a bakery and Dar Al Zaad grocer and butcher. The Retail Services sector offers purely hair and beauty businesses; and leisure services include independent restaurants a café and a take-away. Other key services here include an NHS dental clinic, a pharmacy, funeral directors and print/design shops.

Table 9.19: Local Centre Composition – Plough Green (No.18)

Category	Number of Units	%
Comparison	4	22
Convenience	3	17
Retail Services	6	33
Leisure Services	4	22
Financial and Business Services	0	0
Health Services	1	6
Vacant	0	0
TOTAL	18	100

9.68 The area is generally tidy, with some graffiti on shutters but no litter. Pavements are regular and there are bike racks, a post box, a noticeboard and some seating. An independent ATM and phone box are no longer in working order. This busy main road is well lit and the area feels safe. Covered bus stops in front of Glam-ma City and on the opposite side of the road serve roue 213 between New Malden and North Cheam. Customers park for free, Mon-Sat 8am-6.30pm for one hour, with no return within an hour on-street. There is space for around 12 vehicles, including 2 designated disabled bays.

Richmond Road

9.69 Richmond Road Local Centre is the third largest centre in the 'Kingston and North Kingston' Neighbourhood Area, with a total of 16 units. Located in the far north west of the borough, the centre is situated on the busy A307 which runs parallel (north/south) to the river Thames and sits on the section between Osborne and Bearfield Roads to one side and Chestnut Road and Woodside Road on the other.

9.70 The convenience food sector is limited to a butcher and there is no larger convenience stores or newsagents. A Little Waitrose within the nearby Shell filling station serves as a key attractor but is not currently included within the local centre policy boundary.

9.71 Comparison uses include a computer repair business and window/shutters company. The retail service sector is dominated by hair & beauty businesses and there are two dental practices and two estate agents. Leisure services are the largest category, and include two popular cafés, a restaurant and a take-away; the good quality Queen's Head gastro-pub is a key attractor.

Table 9.20: Local Centre Composition – Richmond Road (No.19)

Category	Number of Units	%
Comparison	2	13
Convenience	1	6
Retail Services	3	19
Leisure Services	5	31
Financial and Business Services	2	13
Health Services	2	13
Vacant	1	6
TOTAL	16	100

9.72 This is a well-kept and well-presented centre benefiting from passing traffic and footfall from local residents. It has consistent, new signage, even pavements and outside terraces for eating at independent restaurants on both sides of the road. Uncovered post-only bus stops on both sides of the road serve the 65 and N65 bus routes between Kingston and Ealing Broadway. New signage directs traffic to park in side streets which have free parking for 1 hour with no return within 2 hours. Most streets have room for around 3-4 vehicles.

South Lane

9.73 South Lane Local Centre is the second smallest in the borough comprising just 6 shop units; it is located in the 'New and Old Malden' Neighbourhood Area. This purpose-built parade lies in a highly residential area; and the small high street is well-kept and features a grass verge with planting, benches, bike racks and a newly installed community noticeboard. There is also a bin to encourage recycling.

9.74 Business uses include Parker's Newsagent, and Leisure Services including a café, a dry cleaner, two hair and beauty businesses and a company issuing animal health certificates and passports.

9.75 The centre is accessible via a slip road from the main thoroughfare and has parking for approximately 16 vehicles, plus one charging point for an electric vehicle. Parking is free for one hour at anytime, with no return within 2 hours. Public transport to and from the centre is by bus; the K5 runs between Kingston and New Malden via South Lane, but there are no visible bus stops in sight of the centre.

Table 9.21: Local Centre Composition – South Lane (No.20)

Category	Number of Units	%
Comparison	0	0
Convenience	1	17
Retail Services	4	67
Leisure Services	1	17
Financial and Business Services	0	0
Health Services	0	0
Vacant	0	0
TOTAL	6	100

Surbiton Road

9.76 Surbiton Road Local Centre is the fourth largest in the borough with a total of 34 shop units, located just south of Kingston Town Centre. It is situated in the 'Kingston and North Kingston' Neighbourhood Area on the A240 and benefits from trade from local residents and also staff and students from the neighbouring Penrhyn Road Campus of Kingston University and Surbiton High School.

9.77 The local centre is comprised largely of leisure and retail services, with the convenience sector only offering a small Londis store, newsagent, off licence and South African grocers. Just north of the centre, Sainsbury's Local is located on Penrhyn Road which is likely to contribute to linked trips. Sainsbury's is located just outside the Local Centre boundary.

9.78 Retail services include several hair & beauty businesses, a locksmith, taxi office and phone specialist. There are four Financial and Business Services including two estate agents, a solicitor and chartered surveyor. Comparison operators include a pharmacy and clothes store. Leisure Services comprise multiple independent cafés and take-away establishments.

Table 9.22: Local Centre Composition – Surbiton Road (No.21)

Category	Number of Units	%
Comparison	2	6
Convenience	3	9
Retail Services	11	32
Leisure Services	12	35
Financial and Business Services	4	12
Health Services	0	0
Vacant	2	6
TOTAL	34	100

9.79 The local centre is perhaps the most accessible local centre in terms of bus routes, with covered bus stops serving numerous routes between Kingston and Hampton Wick including the 71, 281, 406, 418, 465, 514, 515, K2, K3 and N65. On-street parking on either side of the road is in 9 marked bays. Payment is via Ringo (Parking App) and restrictions are 2 hours (no return within an hour) on Mon-Sat 8.30am-10.30pm and Sun 11am-10.30pm.

The Triangle

9.80 The Triangle Local Centre is located in the 'New and Old Malden' Neighbourhood Area. It lies at the point where Dickerage Lane, Kenley Road and Clarence Avenue converge, and the frontage comprises 10 shop units in total. This purpose-built parade is quiet but neat, featuring established trees and planting. There is also a new community noticeboard, bike racks and a post box. It appears well lit.

Table 9.23: Local Centre Composition – The Triangle (No.22)

Category	Number of Units	%
Comparison	2	20
Convenience	3	30
Retail Services	2	20
Leisure Services	1	10
Financial and Business Services	0	0
Health Services	2	20
Vacant	0	0
TOTAL	10	100

9.81 This centre is anchored by Tesco Express and two additional convenience stores – Nisa and Coombe Convenience Store. Other uses include a flooring specialist, pharmacy, dry cleaner, hair and beauty, a dental clinic and a hearing services clinic. Leisure services are limited to one take-away, however Noura Lebanese Restaurant sits adjacent but outside of the local centre policy boundary.

9.82 The centre is accessible by bus which stops directly outside the retail frontage, and the covered stop serves route 213 into Kingston Town Centre. Free parking for 1 hour with no return within 2 hours runs from Mon-Sat 8.30am-6.30pm. Customers are able to park in 15 marked bays (including 2 disabled bays). There are an additional two electric vehicle charging points.

Tudor Drive

9.83 Tudor Drive Local Centre is the smallest in the 'Kingston and North Kingston' Neighbourhood Area, with a total of 7 units. The parade offers two newsagents, 'Better Price' and 'Tudor News' - one with Post Office services. Other shops and services include a pharmacy, dry cleaner, hair and beauty salon, Churchill NHS medical clinic, and Batterfly restaurant and take-away. Beppe's Italian Restaurant forms part of the retail frontage but currently lies outside of the local centre policy boundary.

9.84 The parade, which serves a quiet, residential area benefits from good footfall. It is neat, well-lit and provides a BT phonebooth. Signage is consistent and in good condition and the surrounding green areas are well kept offering a good quality of environment. Parking on-street is for 8-10 vehicles and is free for two hours, with no return within two hours between Mon-Sat 8am-

6.30pm. Hollybush Road covered bus stop is directly outside the centre and serves the 371 route between Kingston and Petersham.

Table 9.24: Local Centre Composition – Tudor Drive (No.23)

Category	Number of Units	%
Comparison	1	14
Convenience	2	29
Retail Services	2	29
Leisure Services	1	14
Financial and Business Services	0	0
Health Services	1	14
Vacant	0	0
TOTAL	7	100

Villiers Avenue

9.85 Villiers Avenue Local Centre is located in the 'Surbiton' Neighbourhood Area and comprises 8 units in total. The parade is anchored by Lower-Marsh Lane Co-op (open daily from 7am-11pm and offering an ATM and Costa) and a Premier Express store. There is also a bakery, launderette and hair and beauty business, plus a construction contractor and a bathroom fittings showroom. Leisure services are limited to the Brunch Café, which appears popular and has indoor and outdoor seating.

Table 9.25: Local Centre Composition – Villiers Avenue (No.24)

Category	Number of Units	%
Comparison	1	13
Convenience	3	38
Retail Services	3	38
Leisure Services	1	13
Financial and Business Services	0	0
Health Services	0	0
Vacant	0	0
TOTAL	8	100

9.86 There are no bus stops in sight of the Villiers Avenue parade. Car-parking offers 7-8 spaces with 30 minutes free to customers of the Co-op, plus an electric charging point. A further 10 spaces are available Monday-Friday 8.30am-6.30pm for 2 hours with payment via Ringo (Parking App). Here, as in many of the borough's Local Centres, customers can make use of the Council's 30 minutes free parking scheme.

9.87 The general appearance of this centre is good. Signage is consistent and in fairly good order and pavements regular. A new Kingston notice board is in situ and looks to be regularly used by the community.

Coombe Road

9.88 Coombe Road is the second largest Local Centre in the 'Kingston and North Kingston' Neighbourhood Area with a total of 24 units. The local centre is located on the outskirts of Kingston Town Centre to the east, and the shopping and services mix is strong. The centre has a Premier Express (Norbiton) small convenience store and there is also a Halal grocery store, butcher, a Japanese deli, an artisan cheese and wine store and a fishmonger with a restaurant attached.

9.89 There is a Sainsbury's Local at the entrance to Norbiton train station to the east of the local centre and a large Asda superstore to the west. These are both around a 2-minute walk but lie outside the local centre policy boundary. Leisure services include restaurants, take-aways and cafés while the retail services sector includes hair and beauty salons, a dry cleaner and a dog grooming parlour. A household goods manufacturer and scuba and snorkelling centre are also represented.

Table 9.26: Local Centre Composition – Coombe Road (No.25)

Category	Number of Units	%
Comparison	1	4
Convenience	7	29
Retail Services	5	21
Leisure Services	8	33
Financial and Business Services	1	4
Health Services	0	0
Vacant	2	8
TOTAL	24	100

9.90 The general environment is tidy and well kept. Pavements are wide, new and barriers have been erected to deter parking on pavements; this assists several cafés and restaurants which offer outdoor seating. Alrahan halal grocery has an Amazon pick-up and drop-off point outside. Overall, this is a busy Local Centre, with good footfall due to adjoining residential uses, student accommodation, the proximity of the train station and two main foodstores to the east and west (Sainsbury's / Asda).

9.91 The centre has excellent public transport links with stops outside the retail frontage serving the K2, K3, K4 and K5 routes between Kingston and Surbiton, and New Malden. Norbiton Railway Station is a 2-minute walk to the east. Parking spaces are limited with room for 3-4 vehicles outside each segment of the run; Monday to Saturday, 8.30am-6.30pm, drivers can park free for 30 minutes, and once over that can stay up to 4 hours with no return within 2 hours (Ringo Parking App).

Summary

- The retention and reinforcement of a sustainable network of Local Centres across the borough forms a key part of the borough's core policy priorities. Equally, in planning terms, the NPPF encourages the provision of social, recreational and cultural facilities and services that the community needs in order to promote strong neighbourhoods, inclusive and safe places, social interaction and healthy lifestyles.
- The borough has 25 existing Local Centres of varying scale, distributed across the borough and four Neighbourhood Areas. The south of the borough has no district or larger centres and reliant on the three existing Local Centres, all of which are large in scale and performing well – offering a range of convenience stores and day-to-day retail, leisure and financial services.
- The vacancy rates are generally low, and no local centre is concluded to be unviable – all are serving a purpose, albeit the smaller centres have a more limited range of products and services. A number of units have been identified outside but adjoining the local centre policy boundaries, and there may be justification to incorporate these moving forwards into the new Local Plan. We return to this point later in the conclusions and recommendations.

10. Quantitative Need

10.1 In this section we set out our assessment of the need for additional convenience and comparison goods retail floorspace across the borough. We set out the performance of existing floorspace as the basis for forecasting the need for additional retail floorspace to the period 2041, incorporating interim years of 2029 and 2034. The quantitative tabulations accompanying this assessment are set out in Appendix 1 (convenience) and Appendix 2 (comparison).

10.2 In identifying need, it is important to note that forecasts become increasingly open to margins of error over time, and accordingly will need to be refreshed over the course of the Council's Local Plan. Paragraph 33 of the NPPF (2023) confirms that policies in local plans and spatial development strategies should be reviewed to assess whether they need updating at least once every five years, and should then be updated as necessary (legal requirement). Reviews should be completed no later than five years from the adoption date of a plan, and should take into account changing circumstances affecting the area, or any relevant changes in national policy.

10.3 We have used a conventional and widely accepted step by step methodology, drawing upon the results of the household telephone survey of existing shopping patterns (2024) to model the existing flows of available expenditure to the network of centres and edge/out-of-centre retail provision. To develop the baseline, we have:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the study area;
- Allocated the available projected expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone survey of shopping patterns so as to provide estimates on current sales and forecasts of future sales;
- Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities/performance in each shopping destination.

10.4 Building on the baseline position, we have explored the need for further convenience and comparison retail floorspace within the borough, having regard to the identified performance of existing floorspace and growth in residual expenditure, i.e. expenditure remaining after claims on that expenditure growth have been subtracted.

Data Inputs

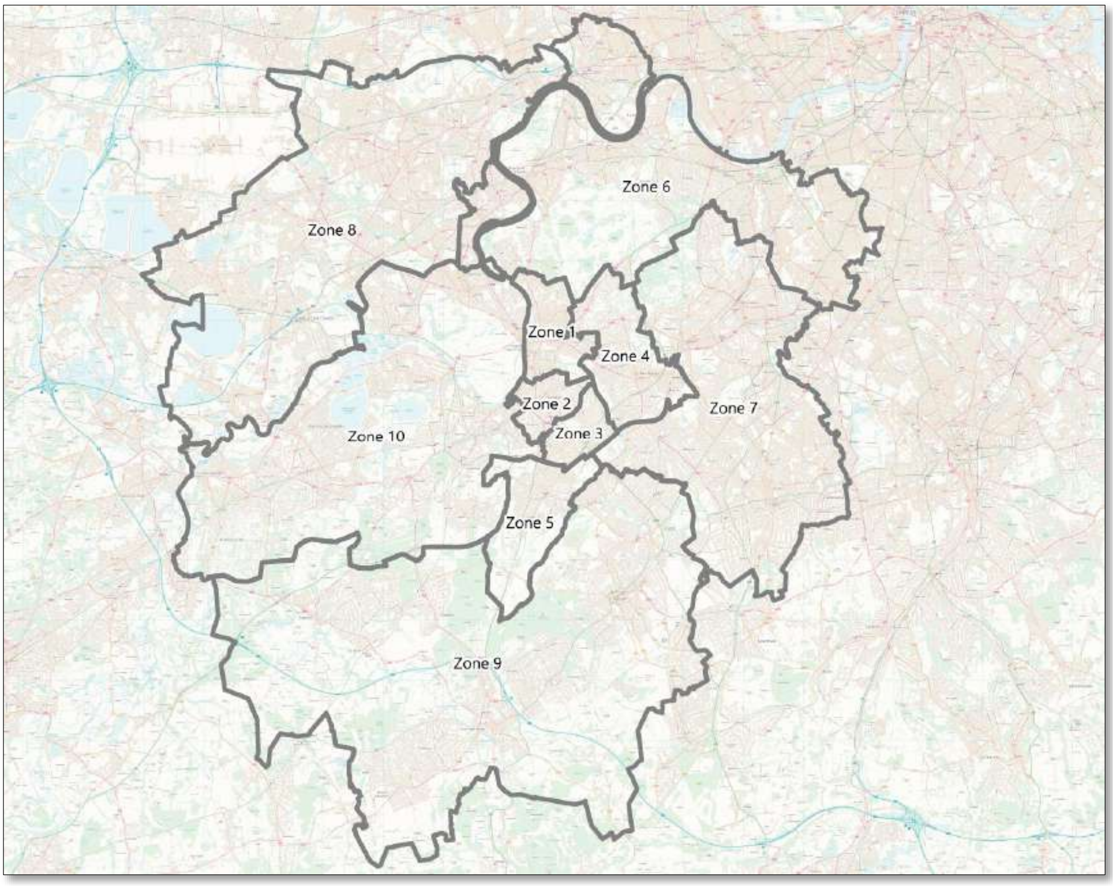
Survey Area and Household Telephone Survey

10.5 As introduced earlier in this study, a new household telephone interview survey was undertaken covering 1,000 households across 10 survey zones (Figure 10.1 below). Urban Shape designed the survey questionnaire in consultation with the Council and NEMS Market Research, who undertook the interviewing and data processing in February 2024.

10.6 The survey results (2024) identify shopping habits of households for both convenience and comparison goods. Where necessary, survey results have been rebased to remove some responses (such as 'don't shop for particular goods' and 'internet shopping') to ensure consistency with categories excluded in the expenditure projections.

10.7 For convenience goods, the household telephone survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% main food / 30% top-up food). This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.

Figure 10.1: Kingston Household Telephone Survey Area, 2024



10.8 The household telephone survey also included seven questions on where respondents normally undertake shopping for the following comparison goods types, which coincide with Experian Business Strategies definitions of comparison goods expenditure:

- Clothing and footwear;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances;
- Audio-visual equipment;
- Personal and medical goods; and
- Recreational and luxury goods.

10.9 In order to determine the combined market share for all comparison goods spending within the survey area, we apply the weighted averages of the household telephone survey results for each goods type based on the proportion of per capita spend on that goods type. This process establishes the pattern of comparison spending for residents in each of the survey zones and is an accepted approach which ensures that market shares for centres and stores are not skewed by any particular goods category.

Population Projections

10.10 Population estimates and forecasts for each of the survey zones are derived using the Experian E-Marketer in-house system. This provides estimates of population based on trend-line projections and the 2021 census for small, localised areas. Overall, the population of the survey area (2024) is estimated to be 1,550,248, growing to 1,560,037 in 2029; 1,569,672 in 2034; and 1,589,465 in 2041.

10.11 Population growth across the full Zone 1-10 Survey Area represents an overall increase of 2.5% over the course of the assessment period. Population within Core Zones 1, 3, 4 and 5 are forecast to have the strongest growth of between 3.6% and 4.5%; albeit Zone 2 – just south of Kingston Town Centre – is forecast to have the lowest growth of just 0.3%. Zone 6 (Richmond/Roehampton) is amongst the higher growth areas (+3.7%), compared to outer zones 8, 9 and 10 with forecast growth of between 0.9% and 2%.

Available Expenditure in the Survey Area

10.12 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure in 2023 prices. We have made deductions for Special Forms of Trading (SFT) which represent expenditure not available to spend in shops (for example internet or catalogue shopping). The deductions we have applied for SFT for convenience and comparison goods are derived from Experian Retail Planner Briefing Note 21 (February 2024).

10.13 As section 3 of this report set out, online shopping (SFT) is accounting for an increasingly significant share of total available expenditure, particularly in respect of comparison goods shopping, and Experian forecast that the ‘claim’ which online shopping makes on total available comparison and convenience goods spend will continue to increase in future years. Retail capacity forecasts are only concerned with identifying the need for new physical ‘bricks and mortar’ retail floorspace, and it is necessary to deduct spending via Special Forms of Trading (SFT) from baseline expenditure forecasts (see Table 3 in Appendices 2 and 3).

10.14 To estimate available expenditure in the survey area, we have applied growth rates based on economic forecasts published by Experian Business Strategies, ensuring due consideration to economic challenges arising over the last 8-10 years (Brexit/Covid) (Retail Planner 21, February 2024). For convenience goods we have applied growth rates of -0.5% per annum in 2024; -0.2% in 2025; 0% 2026-30; and 0.1% for the period 2031-41. For comparison goods, we have applied growth rates of -1.2% per annum in 2024; 2.7% in 2025; 3.1% 2026-30; and 2.8% for the period 2031-41.

10.15 Using the growth rates above and applying relevant deductions for SFT, total available expenditure across the survey area has been grown in five-year intervals (including 2029 and 2034) and up to 2041. Total expenditure is forecast as follows:

- Appendix 1, Table 3 applies per capita expenditure to the population forecasts, which indicates that total available **convenience** goods expenditure within the survey area is £4.37b (2024). This is forecast to fall to £4.34b by 2029, but again grow to £4.35b by 2034, and to a total of £4.42b by 2041. This equates to an overall growth of £46.1m (1.1%) between 2024 and 2041 (Appendix 1, Table 3). Overall expenditure growth within the borough is generally more buoyant, ranging from 2.1% to 3.0% between 2024 and 2041 (aside from Zone 2: -1.2%).
- **Comparison** goods expenditure within the survey area (2024) is £4.71 billion. This is forecast to grow to £5.27 billion by 2029, £5.99 billion by 2034, to a total of £7.27 billion by 2041. This equates to an overall growth for comparison goods expenditure in the survey area of £2.56 billion between 2024 and 2041 (54.3% growth) (Appendix 2, Table 3). Again, growth rates across the borough are marginally higher.

10.16 Longer term projections should be treated with caution due to the potential for changing economic circumstances and growing margins of error over the longer term. The projections are subject to recent economic turmoil and ongoing uncertainty across the commercial markets.

Sales Efficiency, Existing Floorspace

10.17 In forecasting quantitative need for future retail floorspace, we have drawn on economic commentary published by Experian in February 2024. In particular, our analysis and need assessment has regard to the implications of recent economic fluctuations on floorspace efficiency; i.e. the rate in which existing floorspace will absorb any growth in expenditure over the plan period. European and World events have had a direct impact on the levels of floorspace need arising.

10.18 Experian assume a small increase in sales efficiency rate for existing convenience goods floorspace of 0.2% in 2024 and 0.3% 2025-41 (source: Experian Retail Planner 21, February 2024). For comparison goods, Experian estimate that in 2024 existing retail floorspace experienced a fall in retail sales density by -2.7% as a consequence of tightening budgets and the 'cost-of-living' challenges. Experian forecast some correction to this, with an improved sales density of 1.5% in 2025, and 2.8% per annum 2026-41.

Convenience Goods Floorspace Performance

10.19 Table 10.1 below lists the most popular foodstores across the survey area by turnover per annum derived from the survey area (Zone 1-10). This analysis helps inform our understanding of the baseline performance of existing floorspace, with the findings from the calculation underpinning recommendations on the need to enhance market share in conjunction with town centre strategies and identified development opportunities.

10.20 The top performing foodstore in the borough in terms of turnover, is the Waitrose foodstore in Surbiton town centre (49.2m per annum), closely followed by the Sainsbury's, Aldi and M&S Kingston Town Centre/edge-of-centre stores. The data also demonstrates the scale and popularity of some major food superstores outside but close to the borough boundary – seven in total. Table 5, Appendix 1, shows that their level of influence on shopping patterns of borough residents is relatively limited aside from Tesco Extra, Beverley Way, New Malden (London Borough of Merton), which has a strong market share across Zones 2, 3, 4 and 5.

10.21 The important role of foodstores across Kingston Town Centre and New Malden, Surbiton and Tolworth District Centres is evident, whilst the petrol filling station convenience stores (Waitrose Little and Tesco Express) clearly serve a role in the borough achieving strong turnovers.

Table 10.1: Most Popular Foodstores in Kingston Borough by Total Turnover

Foodstore	Trade Draw £m
Sainsbury's Superstore, London Road, North Cheam	143.8
Asda, Roehampton Vale, Roehampton	76.9
Tesco Extra, Beverley Way, New Malden	76.9
Sainsbury's Superstore, Lower Richmond Road, Richmond	62.2
Tesco Express (Esso), London Road, North Cheam	60.1
Tesco Superstore, Oxshott Road, Leatherhead	57.5
Sainsbury's Superstore, Kiln Lane, Epsom	55.1
Waitrose, Claremont Road, Surbiton	49.2
Sainsbury's, Sury Basin, Kingston (Edge-of-Centre)	47.7
Aldi, Adams Walk, Kingston	46.7
M&S, Clarence Street, Kingston	43.4
Sainsbury's Superstore, Bridgeway, Cobham	39.3
Sainsbury's Superstore, Victoria Road, Surbiton	37.3
Waitrose, High Street, New Malden	36.9
Asda, London Road, Kingston (Out-of-Centre)	34.8
Sainsbury's Eden Walk, Kingston	28.5
Aldi, Bridge Street, Walton-on-Thames	26.2
Aldi, Kingston Road, Ewell	26.1
Waitrose, Wood Street, Kingston	24.8
Waitrose Little, Shell Petrol Station, Richmond Road (Edge-of-Centre)	24.6
Tesco Express (Esso), Tolworth Broadway, Tolworth	24.5
Lidl, Leatherhead Road, Chessington (Out-of-Centre)	23.4
Lidl, Gordon Road, Kingston (Edge-of-Centre)	21.8
Lidl, Blagdon Road, New Malden	21.3
M&S Simply Food, Tolworth Broadway, Tolworth	21.0
Tesco Extra, Barns Wallis Drive, Weybridge	19.9

Source: Table 6, Appendix 1

10.22 Foodstores in Kingston, listed in Table 6, Appendix 1, have a turnover of £572.4m, equating to a market share/trade retention of 13.1% - this includes all edge and out of centre foodstores and the network of Local Centres. The Zone 1-10 survey area is large, and food shopping trips are generally local, so it is relevant to understand trade retention within the borough (Zones 1-5). The same network of borough foodstores have a market share/trade retention of 75.9% within this tighter catchment area.

10.23 Table 10.2 below sets out the convenience goods market share of each main town centre within its location zone, illustrating how much local trade each town centre retains within a local catchment area, and how much leaks to alternative destinations. The outputs aren't directly comparable given the different scale and geographical composition of each survey zone, but the exercise does provide some indication of town centre performance within each immediate catchment area. Table 10.2 also compares market share in 2013 and 2024 to understand trends over time.

Table 10.2: Town Centre Location Zone, Convenience Goods Market Share & Trends 2013-24

Town Centre	Location Zone	Market Share 2013	Market Share 2024	Change %
Kingston Town Centre	1	19.3%	32.6%	+13.3%
New Malden District Centre	4	36.6%	38.2%	+1.6%
Surbiton District Centre	2	72.9%	50.8%	-22.1%
Tolworth District Centre	3	30.0%	26.3%	-3.7%

10.24 We make the following observations:

- Kingston Town Centre has seen a strong increase in convenience goods market share subsequent to the 2013 evidence base, with the key change being noted as the new Aldi foodstore on Adams Walk. This discount retailer opened in February 2017 and has a good positive impact on the performance of Kingston Town Centre.
- New Malden has experienced a small increase in market share since 2013, assisted by the opening of Lidl on Blagdon Road subsequent to the 2013 evidence base. More recently, M&S Simply Food opened on the main High Street at the same time as the household telephone survey (February 2024). It is likely that once trading is established, the new store will consolidate the food shopping offer further, and market share is likely to be retained or enhanced.
- Planning permission has been granted for a new out-of-centre Lidl foodstore on the Burlington Retail Park (1,324 sq m gross). This sits outside New Malden district centre and will provide some competition, possibly capturing some market share. This should be monitored moving forward.
- Surbiton has experienced a relatively substantial fall in market share since 2013. Representation has not changed since 2013, and whilst the proportion of businesses is in line with the national average the mix is mainly comprised of newsagents and off licenses rather than independent butchers, greengrocers etc. It is also relevant to recognise the strength of the Local Centres in close proximity, providing direct competition to Surbiton District Centre; notably the Sainsbury's Local in Ewell Road North Local Centre and the newly opened Sainsbury's Local in Alexandra Drive Local Centre – both capturing strong market share from Zone 2 (5.7% and 6.1% respectively).
- Tolworth has experienced a small fall in market share since the 2013 evidence base from 30.0% to 26.3% in Zone 3. The foodstores in Tolworth comprise largely small scale top up foodstores and the larger M&S Simply Food. The evidence demonstrates that some market share has been captured by the new Sainsbury's Local in Alexandra Drive Local Centre and the Aldi foodstore Kingston Road New Malden. The town centre health check has, however,

identified a strong convenience goods sector in Tolworth District Centre. Market share should be monitored in future updates.

10.25 A number of foodstores located outside the borough attract trade from Zones 1-10, identified as 'competing foodstores' to those trading within the borough. Boroughs are not closed systems and some leakage of trade would always be expected; but the analysis has demonstrated the strength of foodstore provision in the borough, and the high expenditure trade retention of 75.9%.

Convenience Goods Floorspace Need

10.26 The convenience goods baseline need assessment has assumed that the borough will maintain existing market share, and the model has forecast the need for new convenience goods floorspace to the years 2029, 2034 and 2041. Based on population and expenditure growth, and the detailed performance analysis of existing floorspace, the analysis identifies a deficiency in residual expenditure to support additional convenience goods floorspace across the borough. At the borough-wide global level, there is a strong surplus to support additional convenience goods floorspace. This is primarily a consequence of the current strong over-performance of foodstores across the borough and in each town centre – almost without exception.

10.27 In assessing capacity for future convenience goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time; i.e. existing floorspace will absorb a proportion of expenditure growth identified. Experian forecast an increase in sales efficiency rate for existing floorspace of 0.2% in 2024 and 0.3% thereafter. When converting residual expenditure into new quality floorspace, operators would be expected to achieve at least £15,000 per sq m net over the plan period. The level of borough-wide need for additional convenience goods floorspace is set out in Table 10.3.

Table 10.3: Kingston Borough-wide Quantitative Need: Convenience Goods

2029 Sq m net	2034 Sq m net	2041 Sq m net
8,532	8,138	7,971

Source: Table 11, Appendix 1
Note 1: Not cumulative, each column illustrates 'total' in that year.
Note 2: Planning Commitment for new Lidl foodstore, New Malden, not included within this scenario

Comparison Goods Floorspace Performance

10.28 Section 4 set out the current trade retention of Kingston Town Centre across the survey area, identifying the loss of market share from 34.1% in 2013 to 22.1% in 2024 (Zone 1-10). We have undertaken the same exercise focusing on the borough (Zones 1-5) trade retention which identifies a slight fall in market share from 58.2% in 2013 to 57.6% in 2024. It was also highlighted that Kingston Town Centre has strengthened its shopping draw for comparison goods in Core Zones 1 and 4, from 68.3% to 70.9% in Zone 1 and 52.4% to 56.7% in Zone 4. Zone 1 and 4 are identified as Kingston's core catchment area.

10.29 Table 10.4 and 10.5 (below) focus in more detail on the localised catchment of each of the four main town centres, setting out their borough market share (Table 9.4) and also their location zone and comparison goods market share within that zone (Table 9.5). It has also been possible to compare trade retention with 2013 to highlight any change over time. The data demonstrates that each town centre has lost a small market share reflecting wider national trends, whilst retail warehousing has experienced a strong market share increase, attracting a greater proportion of people from within the borough (Table 10.4).

Table 10.4: Borough Comparison Goods Market Share and Trend Analysis 2013-24

	2013 Borough Market Share % (Zone 1-5)	**2024 Borough Market Share % (Zone 1-5)**	**% Difference 2013-2024**
Kingston Town Centre	58.2%	57.6%	-0.6%
New Malden Town Centre	3.8%	3.6%	-0.2%
Surbiton Town Centre	3.7%	3.4%	-0.3%
Tolworth Town Centre	1.7%	1.1%	-0.6%
Retail Warehousing New Malden*	11.1%	15.6%	4.5%
TOTAL	78.5%	81.3%	2.8%

**Outside Royal Borough of Kingston upon Thames, located in London Borough of Merton: Halfords, Tapi Carpets, American Golf, Beverley Way; B&Q New Malden; DFS, Carpetright, Shannon Corner Retail Park; Curry's, Dreams, Burlington Retail Park. Curry's straddles both LB Merton and RB Kingston upon Thames*

10.30 Table 10.5, however, demonstrates that Kingston Town Centre, New Malden and Surbiton have all achieved an increase in market share in their core location zone, with Surbiton demonstrating the strongest uplift from 7.7% 2013 to 14.5% in 2024. This demonstrates the 'shop local' trend and the importance of meeting local needs for the local catchment population. It will also be necessary for Kingston Town Centre to continue to widen the town centre offer to compete with less diverse retail warehousing locations over the course of the local plan period.

Table 10.5: Town Centre Location Zone, Comparison Goods Market Share & Trends 2013-24

Town Centre	**Location Zone**	**Market Share 2013**	**Market Share 2024**	**% Change**
Kingston Town Centre	1	68.3%	70.9%	+2.6%
New Malden District Centre	4	7.7%	9.5%	+1.8%
Surbiton District Centre	2	7.7%	14.5%	+6.8%
Tolworth District Centre	3	5.7%	4.1%	-1.6%

10.31 The outputs from the household telephone survey have highlighted the strong influence of out-of-centre retail warehousing around New Malden on the shopping patterns of those living within the borough (Zones 1-5). Table 5, Appendix 2, sets out the following market shares:

- Zone 1 - 8.5%
- Zone 2 - 13.4%
- Zone 3 - 18.1%
- Zone 4 - 20.4%
- Zone 5 - 20.0%

10.32 In addition to generated expenditure from survey area residents, there will also be a level of trade flowing into the borough from further afield. This may contribute to supporting additional/new floorspace needs to be quantified as part of this assessment. Based on an in-depth analysis of the composition and role of each town centre, and evidence from new and up-to-date in-centre shopper surveys and travel pattern analysis, this assessment has assumed an inflow of expenditure to Kingston Town Centre and Surbiton District Centre from beyond Zones 1-10.

10.33 Kingston is a major shopping destination attracting shoppers from London and further afield, whilst Surbiton is a vibrant and cosmopolitan retail destination with a strong bar and restaurant offer for those living locally and further afield. Accessibility is good and, being a London commuter town, the train station is well used. The survey results have also highlighted the role of employment in both town centres with a number of people travelling into these centres to work and consequently utilising the wider town centre offer.

10.34 For both Kingston Town Centre and Surbiton, an inflow of 17% has been calculated to reflect their role beyond serving local shopping needs. When forecasting need, Tables 11, Appendix 2, factor in these inflow levels and we summarise this output in Table 10.6 below, highlighting total town centre 'turnover' for each of the four main town centres. The level of expenditure inflow has been added to trade draw from Zones 1-10 to calculate total town centre turnover.

Table 10.6: Town Centre Comparison Goods Town Centre Turnover 2024 (£m)

Town Centre	Trade Draw Zone 1-10 £m	Inflow Beyond Zone 1-10 %	Total Town Centre Turnover £m
Kingston	£1,041.1m	17%	£1,254.4m
New Malden	£22.2m	0%	£22.2m
Surbiton	£25.5m	17%	£30.7m
Tolworth	£8.0m	0%	£8.0m

10.35 Based on an understanding of existing floorspace and trade draw/turnover, it is possible to set out the trading performance of comparison goods floorspace, i.e. the sales density per sq m. The calculations, drawn from Appendix 2, are summarised here:

- Kingston Town Centre has a comparison goods turnover of £1,254.4m, improving market share in Zones 1 and 4 only, and achieving a 17% inflow from beyond Zones 1-10. Based on a net comparison goods floorspace of 69,544 sq m, we estimate that the town centre has a sales density of c.£18,037 per sq m net. This is a substantial increase from that recorded in 2013 (£10,406 per sq m net). The uplift is the consequence of varying factors including expected inflationary trends and a strong fall in comparison goods floorspace from 103,950 sq m gross in 2013 to 86,930 sq m gross leading to a growth in expenditure being concentrated across a smaller area. The figures are a positive vitality indicator for Kingston, demonstrating a strong comparison goods trading performance.

Comparison Goods Floorspace Need

10.36 The 'baseline' comparison goods need assessment has assumed that the borough town centres will maintain existing market share and the model has forecast the need for new comparison goods floorspace to the years 2029, 2034 and 2041. In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and we have assumed an annual growth in existing sales per sq m net of 1.5% in 2025, and 2.8% between 2026 and 2041 (Experian, February 2024). Based on the role and performance of the town centres, we would expect new quality floorspace to achieve at least £10,000 per sq m net. The level of borough-wide need for additional comparison goods floorspace is set out in Table 10.7.

10.37 The figures demonstrate that there is currently only a small need for additional comparison goods floorspace over the plan period (7,907 sq m net to the period 2041), but even less need to the 10-year forecast period (727 sq m net). The reasons for this are consistent with identified national trends. Expenditure growth has been hit in the short to medium term by volatile national and international markets, SFT is substantially greater through accelerated trends as a consequence of Covid-19, and the rate that existing floorspace is absorbing expenditure continues to remain strong (claiming a high proportion of expenditure growth), as the level of sq m floorspace continues on a downwards trajectory.

10.38 The rate of expenditure growth is not sufficient to substantially override the rate that existing floorspace is absorbing spend over time. Combined with such a strong growth in SFT leads to the current status quo, and only a small level of additional need over the plan period. The over-supply is not currently substantial, so there are no concerns raised in respect of the need to lose space, but the strategy must protect existing provision to consolidate and support healthy town centres over the plan period.

Table 10.7: Kingston Borough Quantitative Need: Comparison Goods

2029, Sq m net	2034, Sq m net	2041 Sq m net
2,124	727	7,907

Source: Table 11, Appendix 2

Note 1: Not cumulative, each column illustrates 'total' in that year.

Summary

- Convenience goods borough trade retention is strong, achieving a Zone 1-5 market share of 75.9%. Within this, convenience goods floorspace in Kingston Town Centre has experienced a strong uplift in market share within it's location zone (Zone 1). New Malden has experienced a small uplift in market share within location Zone 4, but this should be monitored following the opening of the new out-of-centre Lidl foodstore planned for the nearby Burlington Retail Park. Whilst Surbiton and Tolworth have lost market share in their location zones, the range and performance of floorspace is good, and the trend reflects more sustainable and localised shopping patterns, as the Local Centres have gained market share – particularly Ewell Road North and Alexandra Drive.
- The analysis forecasts that the borough could support an additional 8,000 sq m net of convenience goods floorspace by 2034, although it is concluded that much of this could be absorbed across the current level of vacant floorspace in the four main town centres (35,880 sq m gross) and also within existing main foodstores that have physical capacity based on observed queuing and car parking availability. We return to this in the final recommendations.

Kingston Borough-wide Quantitative Need: Convenience Goods

2029 Sq m net	2034 Sq m net	2041 Sq m net
8,532	8,138	7,971

Source: Table 11, Appendix 1

Note 1: Not cumulative, each column illustrates 'total' in that year.

Note 2: Planning Commitment for new Lidl foodstore, New Malden, not included within this scenario

- The comparison goods market share of Kingston Town Centre has fallen from 34.1% in 2013 to 22.1% in 2024; but within the borough market share has remained relatively stable, only falling -0.6% between 2013 and 2024. Market share has increased by 2.6% in Core Zone 1, between 2013 and 2024. This is closely following the 'shop local' national trend. It is emphasised, however, that comparison goods floorspace in Kingston is performing well, with a much-improved sales density (£18,037 per sq m net).
- The outputs from the household telephone survey have highlighted the strong influence of out-of-centre retail warehousing around New Malden on the shopping patterns of those living within the borough (Zones 1-5). There is only a small level of floorspace need by 2034, as the rate of expenditure growth is not sufficient to substantially override the rate that existing floorspace is absorbing spend over time combined with the increase in Special Forms of (online) Trading.
- The over-supply of floorspace is not currently substantial, so there are no concerns raised in respect of the need to lose space, but the strategy must protect existing provision to consolidate and support healthy town centres over the plan period.

Kingston Borough Quantitative Need: Comparison Goods

2029, Sq m net	2034, Sq m net	2041 Sq m net
2,124	727	7,907

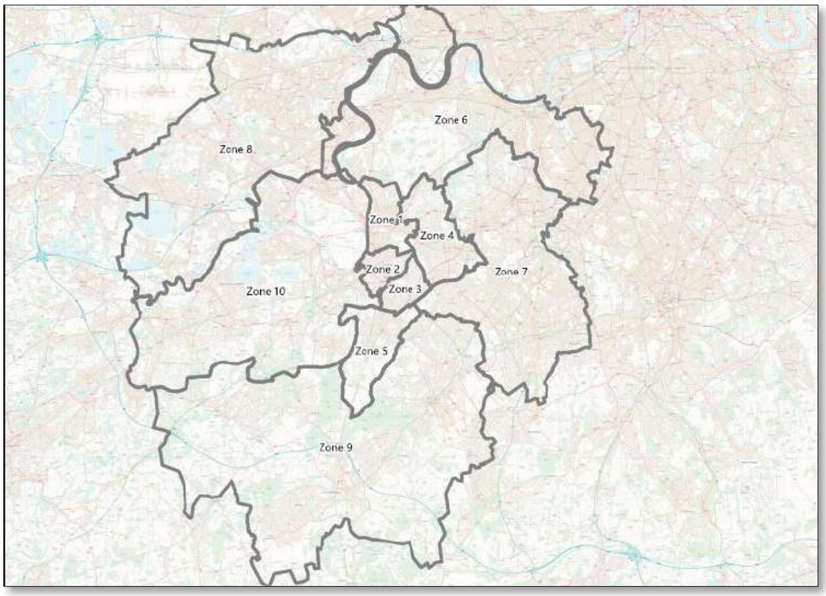
Source: Table 11, Appendix 2 / Note 1: Not cumulative, each column illustrates 'total' in that year.

11. Leisure Assessment

11.1 Commercial leisure and cultural uses have played an increasingly important role in the vitality and viability of town centres by providing complementary uses that strengthen both the daytime and evening economies. The NPPF definition of 'main town centre uses' includes a range of commercial leisure facilities; this section of the report considers the current provision of throughout the study area, including restaurants, cafés, cinemas, nightclubs, family entertainment, health and fitness centres and cultural venues.

11.2 Drawing on the qualitative analysis of current provision, consumer choices, visitor patterns and commercial trends, we provide commentary on the potential need for different leisure uses. For the purposes of this leisure assessment we have analysed leisure travel patterns across the individual survey zones 1-10 (See Fig.11.1).

Figure 11.1: Household Telephone Survey Area (2024)



11.3 The telephone survey achieved the target response of 1,000 interviews, and within that sample 90% stated that they took part in leisure or cultural activities. In respect of sampling, 30% were male respondents and 70% were female; and the age classifications were as follows:

Table 11.1: Age Specification, Household Telephone Survey

Age	% of Respondents
18-24	12.3%
25-34	19.6%
35-44	29.5%
45-54	14.1%
55-64	11.7%
65+	12.8%
TOTAL	**100.0%**

National Context

11.4 Trends in the commercial leisure sector have been discussed in earlier sections of this report, documenting the need to inject life into our high streets and the continued evolution towards multi-dimensional town centres. The town centre of the future should attract local people to take part in a variety of activities – including dining, leisure and sport, culture and the arts, entertainment and medical services alongside business premises, offices, and residential.

11.5 In recent years, the commercial leisure sector has played an increasingly important role in the vitality and viability of town centres, as the nature of town centres continues to evolve. Leisure uses will continue to be important attractors in town centres, demonstrated by a continued uptick in leisure spending over the last 12 months[3], despite the cost-of-living crisis and associated consumer constraints. Both Savills and the Nationwide Caterers Association report that after facing extremely challenging circumstances and substantial closures across the industry, the signs of recovery are stable and strong.

11.6 Pub, restaurant and fast food spend have been trending particularly well for some time, above their long-term averages, whilst entertainment spend – which includes membership clubs, cinemas, ticketed events, sports, galleries, and tourist attractions – have performed above pre-Covid benchmarks.

11.7 The data highlights that whilst eating and drinking spend has increased and consumers continue to prioritise this type of leisure time, there are differentiations between the Food and Beverage (F&B) sectors. During this cost-of-living crisis consumers are seeking 'value' in how they spend their money – both at the discount/fast-food/quick service restaurants – and also what people get for their money; i.e. "eatertainment"[4] and experiential dining and drinking venues. The perception of value is relevant also at the higher price points. The coffee shop market, brunching and drive-thrus are also driving growth in the F&B sector, alongside the increase in quality independents that deliver on authenticity, sustainability and community.

11.8 The middle market brands and big chains have more varied performances, with brands including All Bar One, Miller & Carter, Toby Carvery, ASK Italian and Zizzi all demonstrating resilience against rising challenges in the market. Others, such as Café Route, Las Iguana, Banana Tree, Bella Italia, Frankie & Benny's and Chiquito have struggled more in the current markets reflected in take-over bids and sales.

11.9 Long-term trends and more recent data reaffirm that leisure uses will continue to form an important part of our town centres over the forthcoming plan period. Section 10 of this report has discussed forecast growth in spend per head for food and non-food goods, and in Table 11.1 below we compare this to spend per head on leisure experiences. It is evident from the data that leisure uses will remain a valued and relevant part of our town centres in the future. Despite 'at home' leisure experiences such as streaming services growing in popularity alongside delivery services,

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[3] Savills, UK Leisure Spotlight 2024

[4] The term "eatertainment" combines "eating" and "entertainment" to describe a dining experience that goes beyond simply enjoying food. The food is complemented by the ambiance, setting, and overall entertainment factor, offering a unique and immersive atmosphere with interactive features, live music, themed décor, or unique performances.

the pandemic reminded us of the need and desire for people to leave their homes and socialise with friends and family across a range of leisure experiences.

Table 11.1: UK retail and leisure spend per head 2024-41

Vol Growth Per Head (%)	2024	2029	2034	2041	2024-41
Convenience Goods	-0.5%	0.0%	0.1%	0.1%	-0.4%
Comparison Goods	-1.2%	3.1%	2.8%	2.8%	+1.6%
Leisure Spend	-0.3%	1.1%	0.8%	0.8%	+0.5%

Source: Experian Business Strategies, February 2024

11.10 When considering the need for new leisure floorspace and leisure uses over the plan period, recent planning reform must be taken into consideration. This is discussed in detail in Section 2 of this report, setting out the wide-reaching reforms to the Use Classes Order following the on-set of the Covid-19 pandemic; the overall aim of government being to support the high street and respond to high vacancy rates and consumer demands.

11.11 This was a specific and swift response to the economic impact of Coronavirus on high streets and those premises in A1 and A3 use in particular. In force from 1st September 2020, new planning regulations revoked parts A and D of the existing use classes order and introduced a new 'commercial, business and service' Use Class E. Leisure uses are now split into Use Class E, Use Class F and sui generis, as follows:

- ***Use Class E includes***:
    - sale of food and drink consumption on premises, 'cafes and restaurants' (former A3)
- ***Sui Generis includes***:
    - theatres
    - night-clubs
    - public houses, wine bars, or drinking establishments – from 1 September 2020, previously Class A4
    - drinking establishments with expanded food provision – from 1 September 2020, previously Class A4
    - hot food takeaways (for the sale of hot food where consumption of that food is mostly undertaken off the premises) – from 1 September 2020, previously Class A5
    - venues for live music performance – newly defined as 'Sui Generis' use from 1 September 2020
    - cinemas – from 1 September 2020, previously Class D2(a)
    - concert halls – from 1 September 2020, previously Class D2(b)
    - bingo halls – from 1 September 2020, previously Class D2(c)
    - dance halls – from 1 September 2020, previously Class D2(d)
- ***Use Class F1 includes***:

- F1(b) Display of works of art (otherwise than for sale or hire) – from 1 September 2020, previously Class D1
- F1(c) Museums – from 1 September 2020, previously Class D1

11.12 New Use Class E does not allow policy to control the mix and proportions of shops, cafes and restaurants. However, all other leisure uses fall within sui generis or Use Class F1, enabling a development plan to promote or restrict uses as necessary.

Commercial Leisure Choices

11.13 The household survey results enabled the identification of the most popular leisure activities across the sub-region, the most frequent being (% of all respondents):

- Cafés - 66.0%
- Evening Eating Out - 59.9%
- Cinema - 56.3%
- Daytime Eating Out - 51.6%
- Pubs & Bars - 45.4%
- Cultural Venues - 40.4%
- Gyms/Leisure Centres - 36.8%
- Family Entertainment - 28.3%
- Nightclubs - 7.7%

Cafés

11.14 Visiting cafés is the most popular choice of leisure activity amongst those living in the survey area (Table 11.2). The most popular destination for those living in the borough is Kingston Town Centre, followed by New Malden District Centre, Surbiton District Centre, Chessington and Tolworth District Centre. Local centres in the Chessington area are also serving residents living in the south of the borough – where there are no larger town or district centres – for this leisure activity.

Table 11.2: Preferred Café Choices of those living within Zones 1-10

KB (Z 1-5)	Kingston (43.8%) New Malden (15.9%) Surbiton (12.5%) Chessington (4.8%) Tolworth (4.7%)		Zone 8	Hounslow (26.6%) Brentford (13.5%) Kingston (12.1%) Central London (9.6%)
Zone 6	Putney (24.7%) Chiswick (15.8%) Richmond (15.7%) Kingston (5.4%)		Zone 9	Leatherhead (26.2%) Epsom (18.1%) Great Bookham Village (12.4%) Kingston (7.3%)
Zone 7	Sutton (22.1%) Wimbledon (15.6%) Cheam (15.1%) Kingston (10.7%) [New Malden (0.5%)]		Zone 10	Kingston (19.6%) Weybridge (11.4%) Surbiton (9.5%) Molesey (8.8%) [Tolworth (3.4%)]

Note: KB = Kingston Borough Zone 1-5

Note: Data demonstrates where people living in each zone choose to visit for this leisure activity; data includes top/most popular responses only and does not therefore total 100% within each survey zone.

11.15 Kingston Town Centre also has a strong pull for those living outside the borough, including Zone 10, Zone 8, Zone 7, Zone 9 and Zone 6. Kingston is the most popular destination for cafés for those living in Zone 10. The strategic Metropolitan Centre role draws from a wider catchment area, and café trips form part of a wider linked trip shopping/leisure activity. It is a strong health check indicator for Kingston Town Centre, demonstrating the economic contribution from those living further afield.

11.16 Outside larger scale town/city centres, café visits are generally undertaken 'close to home'. This is reflected in the survey results, with the District Centres having more limited influence on those living in the outer survey zones, beyond the borough boundary. They have strong catchments within their respective survey location zones as follows:

- Surbiton (Zone 2) - 52.6% Market Share
- Tolworth (Zone 3) - 26.9% Market Share
- New Malden (Zone 4) - 50.9% Market Share

Evening Eating Out

11.17 Eating out in the evening is the second most popular leisure activity for those living with the sub-region. Table 11.3 demonstrates that the most popular choice of destination for those living within the borough (Zones 1-5) is Kingston Town Centre. The data demonstrates the longer travel distances for this leisure activity compared to cafés, with Central London featuring strongly as a destination of choice for people living within Zone 8 and 9 of the survey area.

11.18 Within the borough, Central London is the second most popular destination after Kingston Town Centre. Surbiton and New Malden also feature, consistent with our earlier qualitative findings, but it is evident that Tolworth is not a restaurant destination.

Table 11.3: Preferred Evening Eating Out Choices of those living within Zones 1-10

KB (Z 1-5)	Kingston (46.2%) Central London (11.6%) Surbiton (10.7%) New Malden (10.5%) Tolworth (0.7%)		Zone 8	Central London (16.7%) Hanwell (11.5%) Richmond (7.8%) Hounslow (7.0%) Kingston (0.0%)
Zone 6	Central London (21.6%) Chiswick (17.3%) Richmond (17.2%) Wandsworth (8.7%) Kingston (5.6%)		Zone 9	Epsom (22.9%) Leatherhead (18.6%) Central London (12.1%) Kingston (7.8%) Cobham (7.8%)
Zone 7	Wimbledon (19.8%) Kingston (13.2%) Cheam (13.1%) Sutton (12.6%)		Zone 10	Kingston (17.1%) Esher (16.8%) Teddington (10.8%) Weybridge (8.9%) Surbiton (4.9%)

Note: KB = Kingston Borough Zone 1-5

Note: Data demonstrates where people living in each zone choose to visit for this leisure activity; data includes top/most popular responses only and does not therefore total 100% within each survey zone.

11.19 Outside the borough, Kingston Town Centre is also the most popular destination for evening restaurants for those living in Zone 10, and has a draw from Zone 6, 7 and 9 also. Zone 8 does not fall within the Kingston Town Centre evening restaurant catchment area, with residents instead choosing Central London, Hanwell, Richmond and Hounslow.

11.20 The borough District Centres do not draw residents from outside the borough, but New Malden and Surbiton District Centres do have a relatively strong draw from their respective location zones. The individual survey zone analysis, reinforces the conclusion that Tolworth District Centre does not perform an evening restaurant role:

- Surbiton (Zone 2) - 29.8% Market Share
- Tolworth (Zone 3) - 1.3% Market Share
- New Malden (Zone 4) - 28.3% Market Share

Cinemas

11.21 There are two cinemas in the borough, both located in Kingston Town Centre:

- **Odeon, The Rotunda, Kingston Town Centre**: The Odeon is located within the Rotunda Leisure Complex, in close proximity to Kingston Train Station and a number of bars and restaurants within the same development. Alongside the cinema is the Kingston Escape Rooms, Under 8 play centre and café, Pop Playrooms including indoor crazy golf, darts and pool tables, a David Lloyd Health Club and gym, and a number of restaurants. The Odeon cinema has 15-screens including high quality 3D and IMAX, plus choice of recliner club seats. The cinema is the most popular cinema in Kingston Town Centre and the borough.

Figure 11.2: The Rotunda Leisure Centre, Kingston Town Centre

- **Curzon, Bentall Centre, Kingston Town Centre**: The Curzon cinema is located in The Bentall Shopping Centre in the centre of the Primary Shopping Area. Offering only four screens the good quality, modern cinema also has a rooftop bar with views over Kingston and private hire availability. The venue is a short walk from Kingston Train Station, but also benefits from The Bentall Centre car park.

Figure 11.3: Curzon Cinema, The Bentall Centre

11.22 The outputs from the household telephone survey show the good spread of multi-plex cinemas across the sub-region, with little need to travel long distances to visit. The Odeon in Kingston Town Centre is the most popular cinema for those living within the borough and in Zone 10, with the Curzon being the second most popular cinema. Those living in Zones 6, 7, 8 and 9, outside the borough, all visit alternative cinemas closer to home, including Cineworld Wandsworth; Vue Westfield; Omniplex Sutton; Vue Staines; Odeon Epsom; Cineworld Hounslow; and Odeon Wimbledon. Cinemas in Kingston have relatively tight catchment areas compared to the wider comparison goods shopping role and associated catchment area.

Table 11.4: Preferred Cinema Choices of those living within Zones 1-10

KB (Z 1-5)	Odeon, Kingston TC (62.1%) Curzon, Kingston TC (13.5%) Odeon, Wimbledon (6.4%) Curzon, Wimbledon (4.7%)		Zone 8	Vue, Staines (32.0%) Cineworld, Hounslow (20.8%) Cineworld, Feltham (8.7%) Vue, Westfield (5.4%)
Zone 6	Cineworld, Wandsworth (14.9%) Vue, Westfield (13.5%) Odeon Luxe (13.0%) Odeon, Wimbledon (8.5%) Curzon, Richmond (7.2%)		Zone 9	Odeon, Epsom (44.3%) Everyman, Esher (16.9%) Odeon, Guildford (9.2%) Omniplex, Sutton (5.8%) Everyman, Reigate (5.8%)
Zone 7	Omniplex, Sutton (42.9%) Odeon, Wimbledon (23.3%) Odeon, Epsom (9.5%)		Zone 10	Odeon, Kingston (23.6%) Curzon, Kingston (7.8%) Everyman, Esher (25.1%)

Note: KB = Kingston Borough Zone 1-5

Note: Data demonstrates where people living in each zone choose to visit for this leisure activity; data includes top/most popular responses only and does not therefore total 100% within each survey zone.

11.23 Traditional cinema venues are changing and adapting in response to wider TV, movie and streaming trends, and whilst the presence of cinemas in the leisure sector appears secure at present, the future is somewhat uncertain. From an historic high immediately post-war of 1.64 billion admissions during 1946, UK cinema admissions gradually declined to an all-time low of just 54 million in 1984. Since that time, the advent of the multiplex and record levels of investment in improving the theatrical experience, has seen admissions recover and since 2000 they have remained above 150 million.

11.24 There has been much uncertainty in the cinema market given the advent of on-demand streaming services such as Netflix, a cheaper option in the comfort of your own home. Nevertheless, a serious detrimental impact has not yet occurred, with cinemas experiencing their highest admission figures in 2018 and 2019 since 1971.

11.25 Reasons for the market growth is varied. The industry has focused on the release of major blockbuster movies drawing in the crowds, and – importantly – include a more diverse genre from musicals to superhero and animated family films. Alongside films, cinemas have sought to diversify to offer live theatre and opera screenings, providing an alternative entertainment experience, and making West End productions affordable to a wider audience.

11.26 Alongside film release has been the significant investment in the actual cinema venues and the creation of an attractive cinema-going experience. Consumer expectations have risen, and cinemas have become places of comfy sofas, licensed bars, and good quality food and drink. Big cinema chains have installed higher-quality screens and are beginning to introduce monthly subscription plans similar to the 'streamers'. Notably, the industry has seen the rise of more boutique operators such as Everyman – a chain that has tripled its number of venues and level of attendance across the UK over the last 4 years by offering a high end, boutique, quality cinema experience.

11.27 Crucially, as the younger generation question the need for cinema visits, preferring to stream more cost effectively at home, the largest growth has been in the older age categories. These groups, with a greater disposable income, often enjoy a pre-film dinner in the bar with friends, followed by a drink in the comfy reclining chairs on offer.

11.28 A relatively new trend in the cinema market is the growth of the 'pop-up' cinema, estimated to be worth around £10 million in 2019, and growing at between 20-25% per year. A pop-up cinema is a mobile or temporary cinema, usually set-up in locations such as a park, beach, the grounds of a visitor attraction, on a city centre roof-top or other distinctive indoor or outdoor venue. Sometimes, for example, they are decorated seasonally, such as the Christmas themed secret cinemas. They tend to screen timeless classics or popular modern films that consumers are very familiar with, enjoying the experience of watching them again in a very different environment. Operators include Luna, Rooftop Film Club, Sundown Cinema, Backyard Cinema and Secret Cinema, for example.

11.29 In Kingston, these trends would suggest that the two existing cinemas will remain viable, but that there is unlikely to be a need for any additional cinema facilities over the plan period. Each cinema is of a high quality, occupies an important town centre location, and assists in the diversity of uses; we recommend these are protected moving forwards.

11.30 Cinemas were continuing to perform well throughout 2023 and into 2024, following a period of post Covid recovery, but the 'cost of living crisis' and the continued march of streaming services like Netflix, retain a level of uncertainty over what the future for the cinema industry might look like and what direction it might take. We conclude that the current cinemas contribute strongly to the overall health of Kingston Town Centre, but that there is no need to plan for additional cinema provision over the plan period.

Daytime Eating Out

11.31 The analysis of 'daytime restaurant/eating out' usage identifies a very similar pattern to evening eating out (Table 11.5), with most residents in the borough choosing to visit Kingston Town Centre for this purpose. There is little trade leakage from the borough for this leisure activity, reflecting well on the current provision and choices across the network of borough town centres. Central London has a weaker draw compared to evening eating out, but some residents from the borough and Zones 6, 7 and 8, choose to visit Central London most often.

Table 11.5: Preferred Daytime Eating Out Choices of those living within Zones 1-10

KB (Z 1-5)	Kingston (43.9%) Surbiton (15.8%) New Malden (10.8%) Chessington (5.4%) Central London (5.3%) Tolworth (2.2%)		Zone 8	Hounslow (17.1%) Central London (13.1%) Brentford (10.9%) Kingston (9.2%) Teddington (6.2%)
Zone 6	Putney (17.9%) Kingston (16.4%) Central London (15.4%) Chiswick (12.4%) Richmond (10.7%)		Zone 9	Leatherhead (21.8%) Epsom (19.8%) Bookham (8.0%) Cobham (7.8%) Wimbledon (6.9%) Kingston (1.9%)
Zone 7	Sutton (24.7%) Wimbledon (15.3%) Kingston (9.8%) Central London (7.9%) Cheam (7.3%)		Zone 10	Kingston (13.9%) Walton-on-Thames (13.3%) Weybridge (9.7%) Molesey (8.1%) Teddington (8.1%)

Note: KB = Kingston Borough Zone 1-5

Note: Data demonstrates where people living in each zone choose to visit for this leisure activity; data includes top/most popular responses only and does not therefore total 100% within each survey zone.

11.32 The District Centres again demonstrate a more localised catchment area, with strong trade retention within each respective location zone; and performing a stronger role than 'evening eating out':

- Surbiton (Zone 2) - 50.2% Market Share
- Tolworth (Zone 3) - 7.1% Market Share
- New Malden (Zone 4) - 35.2% Market Share

Pubs/Bars

11.33 Visiting pubs and bars is the fifth most popular leisure activity for those living in the survey area. Kingston Town Centre draws people from across the Zone 1-10 survey area – except Zone 7; and has a strong draw for those living to the west in Zone 9 and 10. Kingston has a strong market share for pubs and bars, but not as strong compared to restaurants, cafés and cinemas. The analysis does, however, highlight a good diversity of leisure uses supporting the health of Kingston Town Centre.

11.34 Surbiton and New Malden District Centre are attractive destinations for pubs and bars for those living within the borough, both having a strong market share. Tolworth District Centre does not perform strongly in this sector, whilst Central London does have a small market share. For those living outside the borough, the main destinations for pubs and bars – alongside Kingston Town Centre – include Central London, Putney, Hounslow and Leatherhead.

Table 11.6: Preferred Pub/Bar Choices of those living within Zones 1-10

KB (Z 1-5)	Kingston (38.4%) Surbiton (18.3%) New Malden (11.9%) Central London (6.0%) Tolworth (0.1%)		Zone 8	Hounslow (21.8%) Brentford (15.4%) Twickenham (9.1%) Hampton Hill (7.9%) Kingston (6.2%)
Zone 6	Central London (15.7%) Putney (14.9%) Richmond (14.3%) Chiswick (11.5%) Kingston (6.5%) Wandsworth (6.4%)		Zone 9	Leatherhead (28.0%) Cobham (12.9%) Great Bookham (12.7%) Epsom (10.8%) Kingston (9.1%)
Zone 7	Worcester Park (15.5%) Wimbledon (14.6%) Cheam (13.3%) Central London (12.1%) Sutton (11.9%)		Zone 10	Kingston (20.5%) Walton-on-Thames (12.6%) Teddington (10.8%) Thames Ditton (9.3%) Weybridge (8.5%) Claygate (6.8%)

Note: KB = Kingston Borough Zone 1-5

Note: Data demonstrates where people living in each zone choose to visit for this leisure activity; data includes top/most popular responses only and does not therefore total 100% within each survey zone.

11.35 The role of pubs and bars in Surbiton is highlighted earlier in this report, and further analysis here reinforces the important role this leisure sector plays in the vitality and viability of the District Centre – achieving a 60.4% market share in Location Zone 2. New Malden District Centre has a strong market share of 33.6% in Location Zone 4, and Tolworth has a negligible market share even in the localised catchment area:

- Surbiton (Zone 2) - 60.4% Market Share
- Tolworth (Zone 3) - 1.2% Market Share
- New Malden (Zone 4) - 33.6% Market Share

Cultural Venues

11.36 The Rose Theatre in Kingston Town Centre performs a key role in the wider leisure offer, attracting visitors locally and from further afield. When exploring leisure patterns to cultural venues (including galleries and theatres) the highest response across all parts of the survey area was Central London – reflecting the national and international status of destinations in the Capital.

Table 11.7: Preferred Cultural Venue Choices of those living within Zones 1-10

KB (Z 1-5)	Central London (61.5%) The Rose, Kingston (10.1%) Richmond Theatre (9.4%) New Wimbledon Theatre (5.4%)		Zone 8	Central London (62.9%) Polka Theatre, Wimbledon (12.0%) Richmond Theatre (11.5%) New Wimbledon Theatre (6.0%)
Zone 6	Central London (61.3%) Richmond Theatre (9.4%) New Wimbledon Theatre (4.8%) The Arts Centre, Hounslow (4.8%)		Zone 9	Central London (68.0%) Epsom Playhouse (14.6%) Leatherhead Theatre (4.8%) Richmond Theatre (2.4%)
Zone 7	Central London (60.0%) New Wimbledon Theatre (28.4%) Epsom Playhouse, Epsom (7.8%)		Zone 10	Central London (53.1%) The Rose, Kingston (21.0%) Richmond Theatre (6.2%)

Note: KB = Kingston Borough Zone 1-5

Note: Data demonstrates where people living in each zone choose to visit for this leisure activity; data includes top/most popular responses only and does not therefore total 100% within each survey zone.

11.37 The Rose Theatre predominantly attracts people from the borough and Zone 10 as their first-choice destination. However, the survey also asked where else people visit for this type of leisure activity, with responses identifying a wider catchment, including Zone 6 and Zone 7. The Rose Theatre is a popular first choice destination for borough residents, and a popular second choice destination (after Central London) for those living further afield.

Health and Fitness Centres / Gyms

11.38 Visiting health and fitness clubs is the seventh most popular leisure activity for those living in the survey area (Table 11.8). The most popular destination for those living in the borough is the Malden Centre in New Malden, a public sector facility offering swimming pool, gym facilities and sports halls for a variety of different sports. Other popular facilities include the Nuffield Centre in Surbiton, David Lloyd in Kingston and the Nuffield Centre in Kingston.

11.39 Kingston is also a popular destination for those living in Zone 9 of the survey area; this is likely to be those living in the far north of the survey zone given the popularity of Leatherhead and Epsom in the large part of the survey zone.

11.40 Elsewhere, Putney (Zone 6), Carshalton (Zone 7), Feltham and Hounslow (Zone 8), and Surbiton (Zone 10) are all popular destinations for health and fitness related leisure activities, highlighting the good range and selection of venues in those areas. Facilities in Kingston have a relatively tight catchment area, attracting few people from beyond the borough boundary, but this is to be expected given the number, range and geographic spread of such facilities across the sub-region. People are unlikely to travel longer distances for this type of leisure activity. Surbiton and Newham Malden appear well provided for, and the Tolworth Recreation Centre has a 2.6% borough-wide market share, but has a 15.1% market share in Zone 3. There is a more limited offer in the south of the borough in/around Chessington.

Table 11.8: Preferred Health & Fitness Club Choices of those living within Zones 1-10

KB (Z 1-5)	The Malden Centre, New Malden (27.6%) Nuffield Health, Surbiton (9.2%) David Lloyd, Kingston (8.3%) Nuffield Health, Kingston (8.2%) Tolworth Recreation Centre, Tolworth (2.6%)		Zone 8	Hanworth Leisure Centre, Feltham (22.8%) Heston Pools and Fitness, Hounslow (18.7%) Nuffield Health, Sunbury (16.0%)
Zone 6	Putney Town Centre (24.4%) Brentford Fountain Leisure Centre, Chiswick (7.4%) Fitness First, Balham (4.1%) Pure Gym, Feltham (4.1%) David Lloyd, Hounslow (4.1%)		Zone 9	Leatherhead Leisure Centre, Leatherhead (56.8%) Rainbow Leisure Centre, Epsom (9.0%) Kingston Town Centre (9.0%) Pure Gym, Epsom Town Centre (5.6%)
Zone 7	Westcroft Leisure Centre, Carshalton (18.5%) Sutton Town Centre (17.5%) Cheam Leisure Centre (14.7%)		Zone 10	Nuffield Health, Surbiton (15.5%) F45 Training, Surbiton (9.5%) Teddington Town Centre (8.0%) Walton on Thames Town Centre (7.1%) Elmbridge Xcel Leisure Complex (6.0%)

Note: KB = Kingston Borough Zone 1-5

Note: Data demonstrates where people living in each zone choose to visit for this leisure activity; data includes top/most popular responses only and does not therefore total 100% within each survey zone.

Family Entertainment

11.41 The borough hosts two popular tenpin bowling venues; one at the Rotunda in Kingston Town Centre – 'Tenpin', and one on the edge of Tolworth District Centre – 'Hollywood Bowl'. Both are equally popular with residents in the borough, whilst Hollywood Bowl is more popular with residents in Zone 7 and 10 given proximity, and Tenpin in Kingston Town Centre is more popular with residents in Zone 8 and 9. Both perform a strong role, attracting visitors from across the wider sub-region.

Table 11.9: Preferred Family Entertainment Choices of those living within Zones 1-10

KB (Z 1-5)	Hollywood Bowl, Tolworth (37.7%) Tenpin, Kingston Town Centre (36.4%) Chessington World of Adventures (5.3%) Central London (4.0%)		Zone 8	Tenpin, Feltham (36.9%) Tenpin, Kingston Town Centre (15.5%) Hollywood Bowl, Tolworth (3.5%)
Zone 6	Gravity Max, Wandsworth (20,4%) Tenpin, Feltham (18.0%) All Star Lanes, Holborn (10.3%)		Zone 9	Guildford Spectrum (53.7%) Tenpin, Kingston Town Centre (13.4%)

	Tenpin, Kingston Town Centre (5.1%) Hollywood Bowl, Tolworth (3.7%)			Hollywood Bowl, Tolworth (3.2%)
Zone 7	Hollywood Bowl, Tolworth (45.6%) Tenpin, Kingston Town Centre (25.3%) Gravity Max, Wandsworth (8.4%)		Zone 10	Hollywood Bowl, Tolworth (25.0%) Tenpin, Kingston Town Centre (21.6%) Tenpin, Feltham (16.8%) Guildford Spectrum (8.3%)

Note: KB = Kingston Borough Zone 1-5

Note: Data demonstrates where people living in each zone choose to visit for this leisure activity; data includes top/most popular responses only and does not therefore total 100% within each survey zone.

Nightclubs

11.42 Nightclubs are the least favourite leisure activity in the borough. The nightclub industry has experienced a sharp decline in recent years, with over half of clubs closing down within a decade. This was partly attributed to the change of pub licensing laws in 2005, when pubs and bars could obtain licences to stay open later. This discouraged 'moving on' to the next venue once the pub had shut at 11pm; with consumers able to stay in their pub and bar of choice until 12am or later.

11.43 More recently, nightclubs experienced a 'stop / start' trend following various periods of 'lockdown' as a consequence of the Covid-19 pandemic commencing March 2020. For many, the financial burden of closure led to many never re-opening or having to close down over the following months. Aside from pub licenses and economic challenges, it is widely documented that 'Generation Z' – the younger generation that has never known a life without technology – are no longer frequenting nightclubs as a staple weekend activity. There have been a number of growing trends in recent years:

- 'Generation Z' are more aware of healthy lifestyles, including lower alcohol consumption and healthier drinking and eating habits;
- Nightclubs are no longer the way to meet people. Meeting through friends and family, and online dating apps, is generally considered the preferred option;
- There is a lack of brand loyalty, with Generation Z not committing to visiting the same nightclub time and again, week in week out. Technology has opened the doors to different destinations and alternative leisure experiences;
- Millennials and Generation Z instead enjoy experiences from home, including take-aways, online movie streaming services, and luxury/varied drink offerings such as wine clubs, gin experiences and craft beer delivered straight to your door;
- The importance of 'human connection' has risen, with everyone so reliant on technology in their lives. When people meet up it is reported that they want to do it properly over a nice meal and conversation, with nightclubs not providing the right atmosphere or setting for this.

11.44 It is thought that there will always be a place for nightclubs in their current form, but perhaps a fewer niche venues will specialise in becoming a 'clubbing paradise', whilst many others will diversify instead to meet wider consumer needs. Hybrid venues are likely to rise in popularity, signalling a new era of nightclubs. Hybrid venues offer a daytime offering and nightlife scene too; from coffee and brunch in the morning through to cocktails and live music at night, extending the revenue period.

11.45 The results of the household telephone survey demonstrates that nightclubs are the least popular leisure activity for those living within the survey area, with only a very small proportion (7.7%) stating that they visit this type of venue. This leisure activity is predominantly age specific and limited in reach to the full catchment population. In Kingston Town Centre, the nightclub venues currently include PRYZM and Bacchus. Of those that do visit nightclubs, 28.2% within the survey area visit Kingston Town Centre, whilst 40.8% visit Central London. Within the borough, 54.9% visit Kingston Town Centre, and 30.9% visit Central London.

11.46 Societal trends and a deep commercial understanding of local markets will drive investment in any new nightclub venues in the borough. The composite analysis suggests that there is unlikely to be a need to plan for new nightclub venues over the plan period, and that nightclubs are not crucial in maintaining the vitality and viability of Kingston Town Centre.

11.47 A policy framework can manage the introduction of new nightclub uses effectively – whether supporting or resisting – as they continue to fall under the 'Sui Generis' Use Classes classification. This is more often the remit of licensing as a consequence of potential noise and impact on residential amenity. Any applications should consequently be considered robustly on a case by case basis.

Forecast Leisure Expenditure

11.48 Through the application of the population projections (consistent with those used in our quantitative retail capacity forecasts) to per capita spending on commercial leisure spending (provided by Experian), we can establish an indication of the expected growth in commercial leisure spending which is available to residents of the survey area.

11.49 It is important to note that not all of this expenditure growth can be used to support the development of new commercial facilities, because some commercial leisure spend is accounted for by existing floorspace improving their business efficiency over time. Nevertheless, analysis of the growth in spend is a useful indication of the scope of additional floorspace which could be accommodated. It is advised that the findings of the quantitative analysis below are considered in tandem with the qualitative needs previously identified in this section, together forming a useful baseline in the consideration of development proposals and planning applications.

11.50 Experian identify that annual per capita spend on leisure activities is expected to increase by 1.1% per annum between 2020 and 2024, and 1.2% per annum thereafter. By applying the average per capita spend on each type of commercial leisure activity to the forecast population growth, the total 'pot' of commercial leisure expenditure available to residents of the survey area can be calculated (Table 11.10). The analysis focuses on expenditure growth within the borough only (Zone 1-5), but it should be acknowledged that some leisure uses do draw from a wider catchment area and this should be considered in any planning application and associated submission material.

Table 11.10: Forecast Leisure Expenditure, Zone 1-5 Only (The Borough)

	2024 (£m)	2029 (£m)	2034 (£m)	2041 (£m)	Growth (£m)	
					2024-34	2024-41
Accommodation Services (hotels, guesthouses, B&B's)	54.7	58.2	61.3	65.6	6.6	10.9
Cultural Services (Cinema, Theatre, Concerts)	26.3	28.0	29.5	31.5	3.2	5.3
Games of Chance (Bingo, Casino, Betting)	29.2	31.1	32.8	35.1	3.5	5.8
Restaurants, Cafés, Bars	206.3	219.6	231.3	247.5	25.0	41.2
TOTAL LEISURE EXPENDITURE	**316.5**	**337.0**	**354.8**	**379.8**	**38.3**	**63.2**

Summary

- It is evident from the data that leisure uses will remain a valued and relevant part of our multi-dimensional town centres in the future. Despite 'at home' leisure experiences such as streaming services growing in popularity, the pandemic highlighted the need and desire for people to leave their homes and socialise with friends and family across a range of leisure experiences. The leisure industry has 'bounced back' and spend growth forecasts demonstrate the importance of leisure venues and attractions, and the continued trend to visit and use these facilities moving forwards. The quantitative analysis has highlighted a growth in residual expenditure to support new leisure floorspace, that should be accommodated in town centres in the first instance.
- Cafés are the most popular choice of leisure activity, with Kingston Town Centre drawing people from across the borough and further afield through linked trips with the shopping offer. The three District Centres also have strong café roles, each achieving a high market share within their localised catchment area. This is a strong health check indicator for the four main town centres, demonstrating the economic contribution from this sector, and role in driving linked-trips and longer dwell times.
- New Malden and Surbiton District Centres have strong eating and drinking functions, achieving good market shares for daytime and evening restaurants and pubs/bars. This reinforces the qualitative findings for those two town centres. Tolworth does not perform well in this sector, with a negligible market share for all three leisure activities; this is something that could be encouraged over the plan period, building on the substantial growth in local employment in and around Tolworth Train Station.
- Beyond cafés and restaurants, all other leisure uses fall within sui generis or Use Class F and can be controlled in policy and through development control decisions. The analysis concludes there is no need to plan for additional cinema provision, and new proposals will be based on commercial demand. The impact of new cinemas should be carefully considered given their important role to the diversity and overall health of Kingston Town Centre. The analysis does not support new edge or out-of-centre cinemas.
- The Rose Theatre is a strong performing leisure destination across the borough and wider sub-region and should be supported, protected and invested in over the forthcoming plan period.

- Nightclubs are the least used leisure activity in the borough and have faced numerous challenges in recent years from evolving leisure habits, leading to their decline. There is no need to plan for additional provision, and proposals will be market driven and considered against environmental health and licensing.

12. Conclusions

12.1 This section sets out the conclusions from the analysis and evidence presented in Sections 2-11.

Policy Framework

12.2 The NPPF advocates a 'town centres first' approach and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The NPPF encourages councils to recognise that town centres are the heart of their communities and to pursue policies which protect their health and vitality.

12.3 The London Plan (2021) aims to build strong and inclusive communities and emphasises that development must also promote the crucial role of town centres as places that provide important opportunities for face-to-face contact and social interaction during the daytime, evening and night-time. The London Plan encourages the strengthening of the role of town centres and acknowledges that the adaptation and diversification of town centres should be supported in response to changes in technology and consumer behaviour.

12.4 The London Plan also promotes higher density mixed-use or residential development in and on the edge of town centres – where suitable. The London Plan endorses the application of the sequential and impact test, but – going beyond the NPPF – also requires an impact assessment on proposals for new, or extensions to existing, edge or out-of-centre office uses [that are not in accordance with the Development Plan] – in addition to retail and leisure uses.

12.5 The London Plan identifies the Kingston Opportunity Area, enabling significant additional growth opportunities, but dependent on the delivery of Crossrail 2. This major transport infrastructure project was halted in 2020, and whilst safeguards remain in place around land parcels which would enable Crossrail 2, delivery and completion is unlikely over the forthcoming plan period to 2041. This evidence base does not, therefore, test such major strategic growth and assumes that Crossrail 2 is not delivered over this plan period.

12.6 The Core Strategy seeks to control shopping frontages using the now out-of-date Use Class A land use category, and aspires to strengthen and grow the retail offer in Kingston Town Centre. The AAP informed the Core Strategy, identifying a need for 50,000 sq m of retail floorspace to the period 2016. These forecasts were not delivered and preceded very different economic and market circumstances. This evidence base seeks to update these projections and advise on policy and strategy moving forwards.

12.7 In force from 1st September 2020, new planning regulations revoked parts A and D of the existing use classes order and introduced a new 'commercial, business and service' Use Class E, incorporating former A1, A2 and A3 retail uses. Former A4 (drinking establishments, public houses/wine bars) and A5 (hot food takeaway) uses and D2 cinemas, concert halls/live music venues, bingo halls and dance halls are now defined as Sui Generis.

12.8 A new permitted development (PD) right to allow the change of use from any use, or mix of uses, from the Commercial, Business and Service use class (Class E) to residential use (Class C3) came into force on 1 August 2021. This applies to 'unused' buildings that have been vacant for 3 months, are no larger than 1,500 sq m, and were previously used for at least 2 years for commercial, business or service use as defined by Use Class E.

National Retail and Town Centre Trends

12.9 The role of town centres as a focus for retail remains relevant in today's market to draw in shoppers and footfall. Current thinking and research consistently repeats, however, the need to look beyond the role of retail in order to reinvent the high street, emphasising that the town centre of the future must add an extra dimension to the retail experience. Covid-19 and new planning legislation accelerated these trends.

12.10 Away from the high street, the composition and role of out-of-centre retail and retail parks will almost certainly evolve towards more mixed uses spaces and places as owners seek opportunities for higher density and mixed-use development – as supported in the London Plan.

12.11 It is apparent that these 'extra layers/diversity of uses' are in addition to the core retail role but should be closely connected to ensure a joined-up experience within a comprehensive town centre strategy. Investment in a wider mix of land-uses and public realm/public space improvements will benefit a consolidated retail offer, leading to improved town centre footfall activity. Short-term investment projects alongside longer-term investment for major projects can have far-reaching positive benefits to the performance of a town centre.

12.12 Business rates are a challenge for most high street businesses. Retailers across the country argue that business rates, which are based on the property rather than turnover, are disproportionately high given the level of rent they pay and their profit margins. Online businesses tend to pay lower business rates as they often have fewer premises and of those they do utilise, they tend to have lower rateable values. Bricks and mortar retailers are also often locked into rents that increase annually (upwards only leases) and provide no flexibility during difficult trading conditions, though this is starting to change.

12.13 Many struggling town centres also face a range of other challenges, related to issues like accessibility, ownership, digital connectivity, diversity, affordability, housing and business support. Austerity and the loss of social infrastructure has also been a major issue over the last two decades. Town centres have not only lost retailers, but have seen public sector and third sector services retreat, consolidate or disappear impacting both footfall and vitality. Many councils have had to cut non-statutory services and have sold buildings that deliver social value on high streets. In London, for example, library spending fell by 12% between 2014 and 2019. Libraries are important civic buildings that provide shared and inclusive spaces that are free to access.

Sub-Regional Context

12.14 Shopping catchments and trends have changed in recent years. Change since the 2013 Town Centre Study can be attributed directly to national trends, including the continued growth in online shopping where people can access higher end goods – accelerated during the Covid-19 pandemic when people were more housebound. Alongside online shopping people are able to choose alternative shopping destinations closer to home where the offer is perhaps inferior to Kingston Town Centre but online purchases are filling the void; this includes retail warehousing. Shoppers no longer need to travel to one town centre to access all their goods in one visit and in one place; they can 'shop around'.

12.15 As a consequence, the major shopping destinations of Kingston, London West End and Westfield, have all lost market share; and Richmond, a smaller town centre located within the survey area, has increased market share. Hounslow is located within but near the edge of the survey area and has increased market share within its location survey zone; likely driven also by the opening of the new High Street Quarter.

12.16 The popularity of retail warehousing has continued and has grown in recent years, absorbing a strong proportion of available expenditure; New Malden out-of-centre floorspace is particularly popular. Amongst the District Centres, Surbiton and New Malden are the strongest comparison goods destinations, whereas Tolworth has a substantially lower market share; these conclusions are endorsed below in each respective town centre health check.

Kingston Town Centre

12.17 Kingston Town Centre is performing well, benefiting from an attractive environment and location on the River Thames. Its role as an ancient market town is evident in parts, and today offering a modern metropolitan centre with an extensive range of shops and services and one of the highest accessibility rankings in London. The retail offer is supplemented by a strong range of night-time economy, cultural, health, education and civic functions contributing to the customer base and strong range of town centre uses.

12.18 Key strengths include the representation of department stores operators, a strong selection of national multiple comparison goods retailers and main foodstore operators, the historic lanes and Bentalls Shopping Centre, and an above average provision of leisure uses including a number of visitor entertainment destinations. Non-food shopping continues to drive trips to the centre and there is strong evidence of linked trips with the wide range of uses, leading to high dwell times. In respect of mix and range of goods and services, Kingston continues to perform well as a London Metropolitan Town Centre.

12.19 The core catchment area is relatively tight including just Kingston and Surbiton; over 40% of visitors choose the centre because it's close to home. The Metropolitan Centre clearly continues to meet the varied needs of local residents and also the higher end comparison goods shopping requirements from those living further afield.

12.20 The core catchment area is relatively tight including just Kingston and Surbiton; over 40% of visitors choose the centre because it's close to home. The Metropolitan Centre clearly continues to meet the varied needs of local residents and also the higher end comparison goods shopping requirements from those living further afield. The survey results highlight a relatively good spread of transport mode with only 30% travelling by car. John Lewis and the Bentalls Centre are the most popular parking destinations due to ease of access, and a substantial proportion of people noted that there was always a parking space available across Kingston Town Centre.

12.21 Despite continuing to be above the national average, and presenting a strong mix of operator, the composition of the retail offer in Kingston Town Centre has evolved in recent years losing 17,020 sq m gross of comparison goods floorspace since 2013. This has been replaced by other categories including leisure services, retail services and convenience, as well as the higher vacancy rate. The level of vacant floorspace has seen a substantial increase since 2013 but remains below the national average.

12.22 The trends present in Kingston are consistent with trends experienced across all major London Metropolitan Centres and overall, Kingston Town Centre is displaying strong vitality and viability indicators. Future development and redevelopment proposals will need to evolve in the context of these wider trends. Whilst strategic growth of comparison goods floorspace is unlikely in the current market, the retention of comparison goods floorspace will be important to the future health of Kingston as a sub-regional shopping destination.

New Malden District Centre

12.23 New Malden is a good performing district centre located in the east of the borough. The centre has its own individual character being home to the largest expatriate Korean community in Europe. The general policy aspiration is one of consolidation rather than growth, with the town centre strategy aiming to offer a good range of walk-to retail and services to meet the needs of the diverse local community.

12.24 Key strengths include the convenience goods sector which drives footfall, providing four main town centre anchor retailers – Lidl, Waitrose, Tesco Express and M&S Simply Food; M&S opened in February 2024 as part of the Tudor Williams redevelopment. The comparison goods sector has declined in recent years, including the loss of Wilko and Savers tracking wider national trends, but there remains a good selection of non-clothing national multiples that you would expect to see in a larger district centre.

12.25 The range of financial and business services is more limited, dominated by estate agents, but the town centre does offer a good range of other services including the Post Office, tutoring college and doctors, for example. Alongside a strong selection of restaurants and cafés, the district centre has a particularly strong supply of gyms and leisure centres offering a wide range of sports and activities for the local community. These sporting facilities perform as key anchors in the town centre, with survey evidence demonstrating that they drive footfall and linked trips.

12.26 The vacancy rate is particularly low, and the centre has recently benefited from two developments – the redevelopment of the former Tudor Williams Department Store and the Fountain Public House – both for residential with ground floor commercial. The recent introduction of M&S Simply Food has been a significant positive investment and has since become the most popular and visited shop in the District Centre.

12.27 The district centre has a particularly high localised catchment area, with a high proportion walking to the centre. Frequency of visit is strong, journey time is low, and dwell time is reasonable for a district centre. Alongside the main foodstores, the charity shops and range of gyms/leisure centres were identified as key attractors; and the independent cafés and restaurants have a loyal customer base.

Surbiton District Centre

12.28 Surbiton is a strong performing district centre, located just south of Kingston Town Centre. Benefitting from high levels of accessibility, the centre is a commuter town well known for its range of vibrant bars and restaurants. The general policy aspiration is one of consolidation rather than growth, with the overall objective being to enhance the range of facilities and services for both residents and visitors.

12.29 Key strengths include the convenience goods sector which drives footfall, providing two of the main town centre anchor retailers – Sainsbury's and Waitrose. The comparison goods sector has experienced a strong downward trajectory, now falling below the national average but offering a diverse range of independent businesses and a small selection of key anchor national multiples. Despite the fall in overall representation, the comparison goods sector is concluded to be performing well as part of a wider district centre offering.

12.30 The proportion and diversity of convenience, leisure services, retail services and financial/professional services has grown, ensuring a strong, useful and inclusive town centre for the local community. There is a high number of quality independent businesses across the retail and leisure service sectors contributing to customer satisfaction and loyalty. The vacancy rate remains relatively low.

12.31 The catchment is comprised predominantly of those living within the local area, travelling less than 20 minutes with the large majority walking. Whilst most stay for less than an hour, the diversity of uses ensure some visitors stay for between 1-2 hours. The main purpose for visiting the centre is to food shop, although there are a number of linked trips cited, and also a wide range of issues 'liked' by shoppers and visitors. Overall Surbiton is a healthy and vibrant town centre.

Tolworth District Centre

12.32 Tolworth is a good performing district centre. Located in the centre of the borough, it is dominated by the Tolworth Tower (now a vacant office building) and the presence of the A3 and A240 strategic roads and high levels of traffic. Much time and investment has taken place in recent years to address high traffic flows and consequent barriers to pedestrian movement around the centre. The works undertaken have benefited the district centre with a substantial improvement to movement, connecting both sides of the High Street and beyond to the train station.

12.33 The comparison goods sector has declined in representation over the last 10 years whilst the convenience food and service sector has grown. Key strengths include the convenience goods sector with three national key anchors including M&S, Sainsbury's Local and Tesco Express, supplemented with newsagents and ethnic products across numerous grocery stores. The District Centre also offer a strong range of retail services and the vacancy rate remains low.

12.34 The comparison and leisure service sectors are more limited, with comparison goods declining substantially in recent years, albeit this is reflective of the smaller scale of centre. The range of everyday goods and services for a local catchment is good, and the addition of a petrol filling station with Tesco Express, hotel, Post Office, Library and medical/health services contribute to the vitality and viability of the centre.

12.35 The District Centre has a larger catchment that both New Malden and Surbiton, the number of daily visits is lower and travel by car is substantially higher. This perhaps reflects the level of passing trade on the busy highway network, and role serving those in the south of the borough – 10% live in Chessington, for example. Dwell time is lower, reflecting the more limited range of cafés and restaurants, and the M&S and click and collect service is evidently important in driving visitation rates and the health of the district centre. Costa Coffee and local restaurants Sunshine Café and Particella 107 have a loyal customer following.

Local Centres

12.36 The retention and reinforcement of a sustainable network of Local Centres across the borough forms a key part of the borough's core policy priorities. Equally, in planning terms, the NPPF encourages the provision of social, recreational and cultural facilities and services that the community needs in order to promote strong neighbourhoods, inclusive and safe places, social interaction and healthy lifestyles.

12.37 The borough has 25 existing Local Centres of varying scale and distributed across the borough and four Neighbourhood Areas. The south of the borough has no district or larger centres and reliant on the three existing Local Centres, all of which are large in scale and performing well – offering a range of convenience stores and day-to-day retail, leisure and financial services.

12.38 The vacancy rates are generally low, and no local centre is concluded to be unviable – all are serving a purpose, albeit the smaller centres have a more limited range of products and services. A number of units have been identified outside but adjoining the local centre policy boundaries, and there may be justification to incorporate these moving forwards into the new Local Plan. We return to this point later in the conclusions and recommendations.

Quantitative Need

12.39 The level of borough-wide need for additional comparison goods floorspace is set out in Table 12.1, illustrating a substantially more conservative level of need than presented in the 2013 evidence base.

Table 12.1: Kingston Borough Quantitative Need: Comparison Goods

2029, Sq m net	2034, Sq m net	2041 Sq m net
2,124	727	7,907

Source: Table 11, Appendix 2

12.40 There is only a small need for additional comparison goods floorspace over the plan period (7,907 sq m net to the period 2041), but even less need to the 10-year forecast period (727 sq m net). The reasons for this are consistent with identified national trends. Expenditure growth has been hit in the short to medium term by volatile national and international markets, SFT is substantially greater through accelerated trends as a consequence of Covid-19, and the rate that existing floorspace is absorbing expenditure continues to remain strong (claiming a high proportion of expenditure growth), as the level of sq m floorspace continues on a downwards trajectory (from 103,950 sq m gross in 2013, to 86,930 sq m gross in 2024).

12.41 The rate of expenditure growth is not sufficient to substantially override the rate that existing floorspace is absorbing spend over time. Combined with such a strong growth in SFT leads to the current status quo, and only a small level of additional need over the plan period. The over-supply is not currently substantial, so there are no concerns raised in respect of the need to lose space, but the strategy must protect existing provision to consolidate and support healthy town centres over the plan period.

12.42 There is no need to plan for growth in the comparison goods sector in any of the main town centres, including Kingston. The Council should monitor this beyond the initial 5-10 year period in the context of changing economic circumstances and wider national trends.

12.43 The quantitative analysis does, however, identify a strong level of residual expenditure sufficient to support additional convenience goods floorspace across the borough (Table 12.2). The projections forecast need for 8,532 sq m net by 2029, falling marginally to 8,138 sq m net by 2034, and again to 7,971 sq m net by 2041. It should be noted that projections beyond 2029 should be treated with caution given growing margins of error over longer time periods, and an ongoing uncertain economy.

Table 12.2: Kingston Borough-wide Quantitative Need: Convenience Goods

2029 Sq m net	2034 Sq m net	2041 Sq m net
8,532	8,138	7,971

Source: Table 11, Appendix 1
Note: Planning Commitment for new Lidl foodstore, New Malden, not included within this scenario

12.44 A new Lidl foodstore at Burlington Retail Park (1,324 sq m gross) will absorb a small proportion of the forecast floorspace need, but not a significant amount. The store is a planning commitment that has been granted planning permission but not yet built, and the Council should monitor the performance and impact of this store moving forwards.

12.45 The high level of convenience goods need is driven by the strong performance of most foodstores across the borough, achieving strong sales per sq m than company average expectations. Foodstores across the borough achieve a market share of 75.9% within Zones 1-5, a particularly high trade retention level. The strong performance of these foodstores is leading to surplus residual expenditure that could support additional convenience goods floorspace in the borough.

12.46 Consistent with national trends, the data has highlighted the strong trend towards affordable choices with Lidl and Aldi foodstores performing well across the borough, recording strong sales densities having opened since the 2013 evidence base. These include Aldi, Adams Walk, Kingston Town Centre; Lidl, Gordon Road, Kingston Town Centre; Lidl, Blagdon Road, New Malden and Lidl, Leatherhead Road, Chessington. Long established stores continue, however, to trade well above expected averages, including Sainsbury’s Eden Walk; M&S Clarence Street; Asda, London Road; and stores in Surbiton, Tolworth and New Malden.

12.47 Alongside affordable choices, the trend towards ‘shopping local’ is also evident, with the catchment areas of the traditional large food superstores shrinking. Sainsbury’s, Sury Basin, for example, has experienced a Zone 1 market share fall from 38.8% in 2013 to 19.8% in 2024; and Asda, London Road experiencing a fall from 18.1% to 9.9% in the same zone. Just outside the borough, Tesco Extra Beverley Way has experienced a fall from 21.8% to 10.2% in location Zone 4.

12.48 Our qualitative analysis of the boroughs foodstores identifies strong performing businesses, but ones that potentially have capacity to absorb a proportion of identified need within the existing physical formats; i.e. observed available car parking and short check-out queues. An over-trading store in quantitative terms does not necessarily lead to the need for additional foodstores when qualitative factors are also taken into consideration.

12.49 Nevertheless, the need identified is sufficiently strong to support the delivery of new sites to meet the need arising – if the opportunity and demand presents itself. This should be directed in the first instance to the network of town centres, including the strengthening of new or existing local centres like the new Sainsbury's stores at Ewell Road North Local Centre and Alexandra Drive Local Centre.

Leisure

12.50 It is evident from the data that leisure uses will remain a valued and relevant part of our multi-dimensional town centres in the future. Despite 'at home' leisure experiences such as streaming services growing in popularity, the pandemic highlighted the need and desire for people to leave their homes and socialise with friends and family across a range of leisure experiences. The leisure industry has 'bounced back' and spend growth forecasts demonstrate the importance of leisure venues and attractions, and the continued trend to visit and use these facilities moving forwards. The quantitative analysis has highlighted a growth in residual expenditure to support new leisure floorspace, that should be accommodated in town centres in the first instance.

12.51 Cafés are the most popular choice of leisure activity, with Kingston Town Centre drawing people from across the borough and further afield through linked trips with the shopping offer. The three District Centres also have strong café roles, each achieving a high market share within their localised catchment area. This is a strong health check indicator for the four main town centres, demonstrating the economic contribution from this sector, and role in driving linked-trips and longer dwell times.

12.52 New Malden and Surbiton District Centres have strong eating and drinking functions, achieving good market shares for daytime and evening restaurants and pubs/bars. This reinforces the qualitative findings for those two town centres. Tolworth does not perform well in this sector, with a negligible market share for all three leisure activities; this is something that could be encouraged over the plan period, building on the substantial growth in local employment in and around Tolworth Train Station.

12.53 Beyond cafés and restaurants, all other leisure uses fall within sui generis or Use Class F and can be controlled in policy and through development control decisions. The analysis concludes there is no need to plan for additional cinema provision, and new proposals will be based on commercial demand. The impact of new cinemas should be carefully considered given their important role to the diversity and overall health of Kingston Town Centre. The analysis does not support new edge or out-of-centre cinemas. The Rose Theatre is a strong performing leisure destination across the borough and wider sub-region and should be supported, protected and invested in over the forthcoming plan period.

12.54 Nightclubs are the least used leisure activity in the borough and have faced numerous challenges in recent years from evolving leisure habits, leading to their decline. There is no need to plan for additional provision, and proposals will be market driven and considered against environmental health and licensing.

13. Recommendations

13.1 In this section, we set out a series of Borough-wide / strategic objectives which the Council may wish to take forward in the development of policies for its new Local Plan and other future development plan documents. These are structured around the following key topics:

- Retail Floorspace Need and Accommodating growth
- Borough-wide planning policy recommendations
- Hierarchy of centres
- Town centre boundaries and frontages
- Permitted development and the use of Article 4 Directions

Accommodating Future Growth

13.2 There is only a small need for additional comparison floorspace in the borough over the plan period, particularly through to 2034. Forecasts beyond this period should be treated with caution. Market trends combined with average town centre floorspace data generated by Experian Goad, highlight the decline of comparison goods floorspace within the borough – and particularly Kingston Town Centre – and the wider UK in recent years. Within this market context, proposals for comparison goods/retail led schemes within the borough are unlikely over the plan period and there is no need to allocate sites outside of town centres for comparison goods floorspace. The policy approach should be one of consolidation and enhancement rather than growth.

RBK1: There is no need to allocate sites on the edge of or outside the existing network of town centres for comparison goods floorspace over the plan period.

13.3 Whilst there is no forecast need for comparison goods floorspace over the first 10 years of the plan period, any such development within the existing network of town centres should be supported and encouraged within the policy framework. This might be a redevelopment of existing space – such as Eden Walk or a short stretch of Primary Shopping Frontage, for example – which would lead to positive investment and an enhanced and consolidated retail and leisure offer. Commercial demand and town centre redevelopment proposals for new ground floor retail/leisure floorspace across the network of town centres, including within Kingston Primary Shopping Area, should be supported subject to wider local plan policies.

13.4 The Council should revisit the 2008 AAP to identify the Proposal Sites to carry forwards into the new Local Plan, focusing on Sites P1 (Clarence Street North), P2 (Eden Walk) and P3 in respect of retail/town centre floorspace in the first instance. Policy K1 of the AAP aimed to deliver additional retail floorspace and to extend the Primary Shopping Area. This is now out-of-date, and whilst these sites should continue to form important redevelopment opportunities for the town centre, the importance of flexibility and a wider range of town centre uses should be reflected within the policy framework. Whilst the retention of retail floorspace is important for a strategic town centre like Kingston, diversification has become increasingly important to the longer-term vitality and viability of town centres.

RBK2: Revisit 2008 AAP and identify list of sites to carry forward into the new Local Plan, to include wider town centre uses and a more flexible approach to floorspace mix. Policy should continue to encourage and protect ground floor retail on sites within the Primary Shopping Area, and any site allocation should reflect this position.

13.5 The evidence set out in the town centre health check has demonstrated the continued importance of John Lewis as the town centre anchor retailer, driving visits and linked trips across the town centre. The Council should seek to retain John Lewis over the plan period as part of the wider town centre mix.

RBK3: Seek to retain John Lewis as a key anchor tenant in Kingston Town Centre.

13.6 There is an identified need for additional convenience goods floorspace over the plan period, and this should be directed to the main town centres and the network of existing Local Centres. This could be absorbed in part by the current supply of town centre vacant floorspace (35,880 sq m gross). Elsewhere in the borough, any proposals for new convenience goods floorspace that meet the key policy tests and support stronger and inclusive communities, should be supported.

13.7 Additional smaller scale foodstores are recommended to ensure sustainable shopping patterns across the borough, and recently completed new local stores have demonstrated their strong contribution to Local Centres – ensuring they are meeting local needs and supporting the longer-term vitality and viability of the town centres they serve. The strong role of existing convenience stores has been identified and recognised including the Sainsbury's Local in Ewell Road North Local Centre and the newly opened Sainsbury's Local in Alexandra Drive Local Centre. Any edge or out-of-centre proposals should be carefully considered against the impact test.

RBK4: Set out preferred locations to meet the convenience goods need arising focusing on the network of town, district and local centres, Opportunity Area (should this remain in the new Local Plan), and any residential growth areas in the first instance.

13.8 Leisure floorspace continues to be an important element to a town centre economy, with strong participation rates and forecast growth in leisure expenditure over the plan period. Leisure floorspace in town centres should be encouraged, subject to wider development plan policies / environmental health/licensing. The cinemas, theatres and leisure centres are all well used, and there is no identified need to plan for additional facilities – any edge or out-of-centre proposals will be market driven and should be considered on their own merits, but any impact on town centre facilities should be carefully considered given the likelihood of harmful impact.

RBK5: There is no need to allocate sites on the edge of or outside the existing network of town centres for leisure floorspace over the plan period. Leisure floorspace in town centres should be encouraged subject to wider development plan policies and environmental health/licensing.

Borough-wide Planning Policy Recommendations

13.9 The Council's existing approach to protect and enhance the vitality and viability of town centres is set out in CS12, DM18 and DM20 of the Core Strategy, detailed in Section 2 of this report.

13.10 Policy CS12 states that the Council will maintain and enhance the attractive and distinctive character of Kingston Town Centre and its role as a sustainable Metropolitan Centre; and will seek to enhance the vitality and viability of New Malden, Surbiton and Tolworth District Centres so that they complement the role of Kingston Town Centre. The protection and enhancement of Local Centres and convenience shops is emphasised. This approach is consistent with current policy requirements.

RBK6: The approach driving Policy CS12 should be endorsed in the new Local Plan.

13.11 Policy DM18 seeks to protect existing retail uses, stating that the Council will retain shopping frontages in the District Centres predominantly for retail use, so that they continue to provide locally accessibly goods and services and employment opportunities of a suitable scale for the size of centre. The policy supports local shops and resists their loss – particularly convenience shops.

RBK7: The approach driving Policy DM18 should be endorsed in the new Local Plan.

13.12 Policy DM20 addresses new retail development, stating that the Council will consider applications for new retail development in designated centres favourably, in order to meet identified future needs; support the co-location of retail and community facilities; ensure that any applications for new retail development are of an appropriate scale; and ensure that any applications for new retail development demonstrate the application of the sequential approach and provide an impact assessment as outlined in national policy.

RBK8: The approach driving Policy DM20 should be endorsed in the new Local Plan.

13.13 We make a number of additional recommendations in respect of specific development management policies of relevance to retail and town centres in the borough. We set these out below.

RBK9: Land uses within the relevant locational policies of the Local Plan should be broadened to apply to the 'Location of new Main Town Centre Uses', to ensure all planning applications comply with the key policy tests, notably the sequential site and impact tests. New retail and leisure development should continue to be encouraged across the network of town centres as a key driver of footfall. New retail, leisure and mixed-use town centre development can be controlled through conditions to ensure ground floor occupancy is restricted to specific land uses within the retail and leisure categories. The NPPF Glossary defines the full list of 'Main Town Centre Uses' as follows:

Main town centre uses*: Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).*

RBK10: Policy and town centre strategies should aim to ***retain the core retail functions*** of the Metropolitan and District Centres. In the context of the new Use Class E, the Council should continue to monitor and review regularly the land use composition throughout each town centre.

To ensure an in-depth understanding of role and composition, the updates should go beyond Use Class E and monitor and record by land use category including comparison goods, convenience goods, retail service, leisure service, financial and professional uses and vacant units. Drawing on Experian Goad definitions, the audits should provide a further finer-grained break-down within each land use category at points in time; including for example cafes, restaurants, fast food restaurant and public houses within the leisure services category.

This should include maintaining and regularly reviewing shopping frontages and primary shopping areas and other key town centre uses, venues or facilities in each town centre which contribute to footfall and overall character/identity. This approach will identify the extent and effectiveness of each borough town centre to evolve and diversify in response to wider town centre trends. Later in this section, we review primary shopping area and frontage policies, suggesting amendments which the Council may wish to consider.

RBK11: The Council should ***seek to diversify the role of its town centres***. The Council should look to accommodate an increasing range of uses within the network of town centres, including community space and facilities and housing, to help improve the sustainability of town centres in the long term. Policy should ensure that the introduction of such uses at the expense of ground floor retail/leisure frontage within the defined Primary Shopping Areas is considered carefully within a retail impact assessment. Any applications should be considered on a case-by-case basis, underpinned by a robust retail impact assessment.

The consistency of retail frontages should be retained and protected through policy. Sites could instead include upper floors or well-connected edge-of-centre, for example. There may be exceptional beneficial circumstances of locating other uses within the primary shopping area retail frontage, if that use brings particular linked trip, footfall and vibrancy benefits to the town centre. ***Any loss of retail floorspace within the PSA should be robustly tested*** within a retail impact assessment, to consider the overall loss to the health of the town centre, and the extent to which the new use mitigates against this loss.

RBK12: The Council should provide policy guidance on the ***upper floors*** of retail and town centre shop units, encouraging residential space in vacant and under-used spaces. An Article 4 Direction (discussed later in this section) should encompass upper floors thereby enabling the Council to manage conversion to residential where appropriate whilst ensuring the protection of upper floors for storage areas associated with the viability of ground floor retail/leisure businesses. Any subsequent planning application for change of use of an upper floor should be accompanied by a commercial usage strategy addressing this point, to ensure retail space remains viable with sufficient back office/storage space. Within the framework of an Article 4 Direction, planning applications for change of use from Use Class E commercial to residential should be accompanied with details of storage space and associated viability of the retail unit at ground floor level.

RBK13: The Council should ***support the delivery of redeveloped or refurbished space, particularly if considered sub-standard or low density*** to deliver the diversification of town centre uses, alongside support for the retention of ground floor shop frontages. The Council should work with developers/landlords to bring forward sites and spaces that could be used to intensify the economic function of town centres. This includes a wide range of space that can be used to support the future economic evolution of the borough's town centres, including retail and leisure; community, religious, health and education; and more general employment space and workspace (including SME workspaces, artists spaces and maker spaces). Town centre strategies should encourage diversification alongside support for ground floor shop frontages to underpin and future proof the vitality and viability of town centres; any loss of retail floorspace should be assessed robustly by a retail impact assessment.

RBK14: The identification of sites to meet floorspace 'need' should be subject to ***the sequential test*****.** In accordance with the approach set out in paragraphs 91 and 92 of the NPPF (2023), new floorspace should be directed towards the Council's network of Metropolitan, District and Local centres in the first instance. Based on the evidence presented, there is no requirement to allocate sites outside of the network of town centres for comparison or commercial leisure floorspace. The Council should allocate sites to meet forecast convenience goods need over the plan period; this should be directed to the network of existing town centres in the first instance.

RBK15**:** The Council should consider favourably options for the ***intensification of out-of-centre retail sites*** for non-retail uses, including existing retail parks and large format supermarkets. Reflecting the requirements of London Plan Policy SD7, the emerging Local Plan should recognise the potential of these locations to deliver housing intensification through redevelopment, ensuring these locations become more sustainable in transport terms. The consideration of opportunity to realise the full potential of such sites should be encouraged in policy. The main opportunity sits on the boundary with London Borough of Merton, where the largest concentration of retail warehousing is present.

The importance of the retail floorspace and its contribution to meeting shopping needs should be considered as part of any redevelopment proposals. There is a deficit of expenditure to support additional comparison goods floorspace, but any evolution of the destination should consider the retention and ongoing role of retail in this general location – New Malden. The Council may wish to consider the evolution of this destination through a place-making approach.

RBK16: Policy should aim to control proposals for new/redeveloped Use Class E floorspace in out-of-centre locations where possible, clearly setting out the type of floorspace by stated land use, scale and location, to ensure new development accords with what has been tested through the planning application process. The Council should use conditions when issuing planning permissions to control the land use type at a finer level of detail than generic 'Use Class E'.

RBK17: Policy should endorse ***the sequential test***. Planning applications for the development of retail, commercial leisure and other 'main town centre uses' (as defined by the NPPF) which are not within a defined centre – including new Local Centres – will need to demonstrate ***compliance with the sequential and impact 'tests'*** set out at paragraphs 91-95 of the NPPF (2023). The Local Plan should go beyond advice set out in the NPPF to ensure consistency with London Plan Policy SD7; i.e. requiring proposals for edge or out-of-centre office development (not compliant with the Development Plan) to be accompanied by an office impact assessment.

During the preparation of a sequential site assessment, local authorities should be proactive in presenting sites to developers as potential town centre development opportunities, which could include vacant units. These will include the Strategic Sites as part of the new Local Plan. The Council should work closely and pro-actively with applicants to identify sequentially preferable sites which should be considered through the sequential test. Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the considerations in paragraph 94, it should be refused.

RBK18: Policy should endorse ***the impact test***. The Local Plan should confirm and enforce a ***retail impact threshold***, ensuring that edge and out-of-centre retail development proposals are required to undertake a full and detailed retail impact assessment for schemes at or above 300 sq m gross. This level remains robust to define anything proposal that is 'more than just local' in nature/scale; a small convenience/newsagent is generally no larger than 300 sq m gross, and would sit comfortably within a localised and sustainable community without having a detrimental impact on the hierarchy of town centres. Anything larger becomes more strategic in nature, having a stronger consumer trade draw, and therefore a potential impact on existing floorspace. Anything over 300 sq m gross should be carefully considered through an impact assessment to ensure the Local Plan strategy to define and protect the network of town and local centres is reinforced and protected.

RBK19: Policy allocations and conditions attached to planning permissions should encourage ***active frontages*** including uses which serve the public and enhance the function and vibrancy of each centre as a shopping and leisure destination. High street retail areas should avoid and prevent 'closed/dead' frontages which are inactive and discourage vitality, vibrancy and pedestrian footfall. Policy should encourage transparent glazing, and high quality and consistent shop frontage design and signage.

RBK20: Policy should support flexibility and the temporary or ***'meanwhile' uses*** of vacant properties. The term 'meanwhile use' refers to the short-term use of temporarily empty buildings, including shops until they can be brought back into commercial use. Such innovative action provides an opportunity to help keep a town centre vibrant, whilst the landlord is able to continue to look for a new commercial occupant for the space during the meanwhile use. Meanwhile uses are generally for the benefit of the local community, for example; meeting spaces, informal training and learning spaces, temporary rehearsal spaces, pop-up shops and exhibitions, and so on. They can offer a breeding ground for innovative ideas and empower the local community, lasting just a few days or several years. Policy should continue to encourage this mechanism within the borough's town centres.

RBK21: Evidence has demonstrated the importance of the market to Kingston Town Centre and the significant customer loyalty which underpins a strong trading performance. The NPPF encourages local authorities to retain and enhance existing ***markets***; and in this context a policy building on Core Strategy Policy CS12 and protecting Kingston Town Centre Market should be included. The Kingston Town Centre health check and town centre analysis demonstrates the continued importance of the market to the overall vitality and viability of the town centre, attracting local customers and those from further afield. The market should be supported and protected within the new Local Plan, and diversification and eventing encouraged.

RBK22: The quantitative retail and commercial leisure needs identified in this study should be subject to ***regular review*** throughout the Council's Local Plan period. We advise that quantitative forecasts beyond 2029 are considered indicative because key inputs into the quantitative need assessment such as population, rates of online shopping and expenditure growth will invariably change. Alongside this, patterns of shopping will continue to evolve, both as technologies change, and residents of the borough respond to new retail and leisure developments both inside and outside the borough.

RBK23: In response to London Plan Policy HC6, the Council may wish to consider a ***Night-Time Economy Strategy*** for the borough or focused on Kingston Town Centre and New Malden, Surbiton and Tolworth District Centres. The night-time economy is becoming increasingly important to London's economy, with continued momentum to promote London as a 24-hour global city. However, it is recognised that 24-hour activities are not suitable for every part of London, and boroughs should balance the needs of local residents in all parts of London with the economic benefits of promoting a night-time economy.

The nature of many night time economy uses (e.g. late night bars, clubs, and associated uses such as takeaways and late night fast-food outlets) means that it is particularly important for a joined-up approach to the development of a strategy, including planning, licencing, culture, regeneration, cleansing services and community safety. Boroughs are advised to work closely with stakeholders such as neighbouring boroughs, the police, local businesses, patrons, workers and residents.

Applications for new Night Time Economy Uses (6pm-6am operational) should be directed to Kingston Town Centre – in accordance with the current role and London Plan hierarchy/strategic areas of such activity. Applications for development elsewhere in the borough should be considered on individual merits, with particular consideration to amenity and safety.

Hierarchy of Town Centres

13.14 The current hierarchy of main town centres in the borough, as set out in the Core Strategy, is summarised below:

- Metropolitan Centre: Kingston;
- District Centres: New Malden, Surbiton, Tolworth;
- Local Centres: As set out in Table 9.1; and opportunity to separate Park Road/Kingston Hill into two separate Local Centres given physical separation.

13.15 Based on our assessment, we do not consider there to be a policy case for any change to the borough's hierarchy of town centres at the present time. They are all performing a role and function in line with Development Plan definitions and aspirations. There is also no evidence to suggest that any of the centres should be de-designated from the borough's hierarchy of centres.

13.16 To inform this appraisal, the in-depth health check analysis and quantitative assessment has considered the London Plan policy role, scale, number of operators, retailer representation and status of multiple retailers, evening economy and cultural attractions, turnover and sales density, and sub-regional / national / and international role.

RBK24: Retain the existing hierarchy of town centres.

Local Centres

RBK25: Retain Local Centre frontages rather than boundaries to ensure any new development sites/proposals are measured from the active commercial frontage. This will underpin any sequential site and impact assessment, assisting integration and connectivity with the existing Local Centre provision. Informed by a detailed analysis of each Local Centre across the borough, the following recommendations could be considered:

- Alexandra Drive: extend boundary to include new Sainsbury's Local;
- Cambridge Road: extend boundary to include unit currently occupied by ADA convenience store;
- Ewell Road South: extend boundary to include units currently occupied by Up & Running and Monkey Puzzle children's nursery;
- Kingston Hill Park Road: extend boundary to include The Black Horse public house;
- Richmond Road: extend boundary to include petrol filling station including Little Waitrose;
- Kingston Hill/Park Road: split into two separate Local Centres.
- Tudor Drive: extend boundary to include unit currently occupied by Beppe's Italian Restaurant.

RBK26: Retain and reinforce of a sustainable network of Local Centres across the borough to encourage the provision of social, recreational and cultural facilities and services that the community needs in order to promote strong neighbourhoods, inclusive and safe places, social interaction and healthy lifestyles.

RBK27: Planning applications for new Local Centres should be accompanied by a ***Retail and Leisure Impact Assessment*** to ensure their scale is appropriate to the development and the geographic locality and wider network of town centres. Policy should restrict land uses within new Local Centres through the use of tightly worded policies, site allocations and conditions (considering a greater level of detail than 'Use Class E') attached to planning permissions. Planning conditions should be led by land uses tested within the submitted Retail Impact Assessment. This policy and development management approach will assist the Council in managing the health of the new centres moving forwards, ensuring a truly sustainable community with access to an appropriate mix of retail and leisure services. Council may wish to support Use Class (excluding offices), Use Class F and other main town centre uses that may be appropriate to the role of a Local Centre.

RBK28: Policy should restrict sui generis uses from forming part of a new Local Centre, unless discussed and tested through the planning application process. Any town centre uses not falling within Use Class E or Use Class F, should be restricted/prevented through conditions attached to a planning permission. These restricted town centre sui generis uses should include amusement arcades, taxi businesses, retail warehouse clubs, nightclubs, casinos, betting offices/shops, pay day loan shops, public houses/wine bars/drinking establishments, hot food take-aways, venues for live music performances, cinemas, concert halls, bingo halls and dance halls. Proposals including these uses should be fully tested as part of the planning application process.

Town Centre Boundaries and Frontages

13.17 The NPPF directs local planning authorities to define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre.

13.18 The Planning Practice Guidance (PPG) emphasises that whilst the NPPF has removed reference to primary and secondary shopping 'frontages', authorities may, where appropriate, define Primary Shopping Frontages and Secondary Shopping Frontages where their use can be justified in supporting the vitality and viability of particular centres. These frontage allocations would, combined, form the Primary Shopping Area.

13.19 We draw attention to the following definitions set out at Annex 2 of the NPPF (2023), which now excludes reference to primary and secondary shopping frontages:

Town centre *– Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance.*

Primary Shopping Area **–** *'Defined area where retail development is concentrated'.* (The Primary Shopping Area is the relevant boundary when considering the retail sequential site and impact assessment. Edge and out-of-centre is measured from the boundary of the Primary Shopping Area).

Edge of centre*: For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. [For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.]*

13.20 Previous versions of the NPPF provided definitions of primary and secondary shopping frontages – 'Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.' As noted above, the PPG confirms that local authorities may continue to use these frontage allocations if it is justified in supporting the vitality and viability of particular centres. Previous versions of the NPPF confirm that Primary and Secondary Shopping Frontages (combined) form a Primary Shopping Area.

RBK29: Policy should protect shop uses at ground floor level. This policy position should be enforced in the new Local Plan, ensuring *new and redevelopment of space* includes ground floor retail / leisure floorspace, and active frontages, within the defined primary and secondary shopping frontage. New planning permissions should be conditioned accordingly by land use category/description, not general Use Class. This will ensure control of land use in the future.

RBK30: Retain clear illustrations of Primary Shopping Frontage, Secondary Shopping Frontage and Primary Shopping Area for Kingston Town Centre on the new Local Plan Policies Map, using definitions consistent with the NPPF and PPG. The Core Strategy Policies Map illustrating these allocations should remain unchanged. There is no evidence to suggest that these defined allocations should be amended. Kingston Town Centre is a top performing UK town centre, and there is no recommendation to support contraction or change at the current time.

RBK31: Retail clear illustrations of Primary Shopping Areas for New Malden District Centre, Tolworth District Centre and Surbiton District Centre. Change the policy allocation from 'District Inset Areas' to 'Primary Shopping Areas' to ensure consistency with the NPPF and PPG, and clarity for the purposes of the retail sequential site and impact assessments. We recommend the following boundary changes:

- **New Malden District Centre**: Consolidate boundary to north of the District Centre, up to Acacia Grove and Alric Avenue. Remove frontage beyond this road junction.
- **Surbiton District Centre**: Consolidate boundary to west of the District Centre, up to Balaclava Road and Maple Road. Remove frontage beyond this road junction.
- **Tolworth District Centre**: Retain District Centre with no change. Earlier sections of this report have noted major development to the south of the A3 roundabout at Tolworth Train Station, including Signal Park (residential), a new Lidl Headquarters (offices) and a new Premier Inn Hotel. The development is an important investment, but does not include active frontages characteristic of a district centre. To protect the current district centre, this area should remain outside Tolworth District Centre, enabling the Council to request sequential site and impact assessments should new Main Town Centre Use proposals come forward. This should be kept under review during the course of the new Local Plan and incorporated at a later date if considered appropriate. We recommend this area is not included as part of the new Local Plan.

13.21 Area Action Plan Policy K2 seeks to control Use Class A1/2/3/4/5 throughout the ground floor of Primary and Secondary Frontages, and to bring back into active use upper floors for residential, offices or community uses. The creation of new class E means, however, that changing a former class A1 use to any of former class A2, A3, B1, D1 or D2 uses would not constitute development and no planning application would therefore be required. As a result, policy can only control changes from former class A1 uses (now class E) to non-class E uses.

RBK32: Within the ***Primary Shopping Frontage***, Local Plan policy should prevent change of use to any non-Use Class E land use. Retail and leisure uses at ground floor should continue to be supported in the Local Plan as the preferred land use within the Primary Shopping Frontage, and any loss of retail/leisure (rather than stating Use Class E) should be restricted where possible. Any change of use to Use Class F and town centre Sui Generis may be considered on a case by case basis, but a full Retail Impact Assessment must be undertaken to assess the overall detrimental impact – or otherwise – that this may have on the health and vitality and viability of the retail frontage and wider Primary Shopping Area.

Sui Generis uses that should be carefully managed and strongly resisted within a Primary Shopping Frontage and considered on a case by case basis, include:

- Amusement arcades and casinos;
- Nightclubs;
- Betting offices/shops;
- Pay day loan shops;

- Public houses, wine bars or drinking establishments;
- Hot food take-aways.

RBK33: Policy should recognise the potential to accommodate non-Use Class E main town centre uses within the ***Secondary Shopping Frontage in Kingston Town Centre*** and the ***Primary Shopping Areas of the District Centres***. This will support flexibility and diversification where appropriate. Non-Use Class E Main Town Centre Uses should be considered on a case by case basis and on the merits of each respective planning application, exploring the impacts such a use could have the main shopping function of the town centre. Certain land uses (sui generis bars, for example) could form part of a wider Evening Economy Strategy - an over proliferation should be avoided and other issues considered, such as noise and safety.

RBK34: Policy should consider defining a '***Town Centre Boundary***' for Kingston Town Centre – consistent with the NPPF definition, beyond the Primary Shopping Area and including wider commercial, cultural and other main town centre uses. This would reflect the current Core Strategy Kingston Town Centre AAP boundary.

RBK35: Policy allocations and conditions attached to planning permissions should prevent the proliferation of ***fast food take-aways*** (sui generis). The four main town centres currently have the following proportion of fast-food take-aways:

- Kingston Town Centre - 4.9%
- New Malden District Centre - 6.1%
- Surbiton District Centre - 5.6%
- Tolworth District Centre - 9.7%

The national average is currently 6%, and policy may wish to ensure that the representation of fast-food take-aways (Sui Generis) does not exceed this level (6%) within each respective Primary Shopping Area, and each application should be considered on a case-by-case basis to take into account operating hours, proximity to education, and noise/public health and ventilation. The new Local Plan should restrict the proliferation, distribution and catchment areas to avoid clustering and proliferation. Assessment against the current level of provision will assist with development management decisions; Tolworth and New Malden have, for example, already exceeded this threshold and applications for new sui generis fast food take-aways should be refused.

RBK36: Shop storage and office areas should be protected. Policy should protect storage and office areas above (or below) ground floor level within town centres unless it is successfully demonstrated that their loss will not adversely impact required operational storage space, leading to an unviable or unlettable shop unit. It is crucial that retail and leisure businesses can retain and secure the necessary storage areas to make their businesses viable.

Permitted Development and the Use of Article 4 Directions

13.22 Retail continues to remain a vitally important footfall driver in centres, and continues to be the main reason that people are visiting the centres. A retail offer which mixes representation from national multiple retailers which act as 'anchors' and specialist independents which provide diversity is important to attracting footfall, and we expect this to continue over the course of the Council's new Local Plan period.

13.23 At the national level, whilst town centres are undoubtedly going through a period of transition, successful centres continue to be supported by retail. Recent UK benchmark data have show Kingston Town Centre to be amongst the top performing town centres in the country, and this role and positioning should be retained and protected. The continued importance of retailing in underpinning the vitality and viability of the borough's network of centres is also borne out by the findings of the household telephone survey undertaken in support of the study. In total, the borough's network of Metropolitan and District centres and out-of-centre retail warehousing attract around £350m of (just) comparison goods retail expenditure into the borough – excluding any gross value added. These figures confirm the vital role which retail plays in supporting the overall health of the borough's town centres.

13.24 The diversification of each town centre is crucial if the borough's town centres are to remain relevant and viable over the plan period. If there was, however, a significant shift away from 'shop' retail in Kingston Town Centre in particular, the reasons for visiting the centre would fall and potentially erode footfall, dwell time, frequency of visit, and turnover, with potential implications for the wider vitality and viability of the centre. Ground floor retail and shops in town centres should therefore be protected.

Permitted Development Rights

13.25 A new permitted development (PD) right to allow the change of use from any use, or mix of uses, from the Commercial, Business and Service use class (Class E) to residential use (Class C3) came into force on 1 August 2021. In town centres, retail shops can change use to residential use without the need for planning permission. This applies to buildings that must have been in a commercial, business, or service use for at least two continuous years previously. This new permitted development effectively encourages flexibility but could also dilute retail frontages and erode the overall vitality and viability of a town centre.

Article 4 Directions

13.26 Councils have the power to remove national permitted development rights under what is known as an 'Article 4 Direction'. The Council introduced A borough-wide Article 4 Direction came into force on 31st July 2022, removing permitted development from Use Class C3 (residential) to Use Class E (commercial, business and service uses). The areas covered by the Article 4 Direction are the borough's designated main town centres (including Kingston Town Centre and Tolworth, Surbiton and New Malden District Centres), local centres and industrial areas.

13.27 Paragraph 53 of the NPPF confirms that, when related to change from non-residential commercial use (Use Class E) to residential use (Use Class C3), the use of an Article 4 Direction should be limited to situations where it is necessary to avoid wholly unacceptable adverse impacts; including the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability. In June 2023 a modification notice came into force following direction from the Secretary of State, focusing the borough areas / boundaries to cover the most essential commercial, business and service uses.

13.28 Moving forwards, there is a need to ensure the main town centres remain strong centres which meet a full range of local residents' day-to-day shopping, and, in the case of the higher order town centres, a good choice and breadth of 'shopping'. A number of town centres comprise 2-3 storey frontages that could easily convert to residential buildings at ground floor; and many buildings in peripheral areas of the Primary Shopping Area may be vulnerable to this change of use. The Council may also wish to consider protecting upper floors in use as ancillary shop space, for example.

13.29 The vitality and viability of centres is dependent on providing a critical mass of quality, footfall-generating retail and leisure uses, and the application of appropriate Article 4 directions will ensure that the borough's network of centres continue to function as healthy centres over the new Plan period.

RBK37: Continue to endorse the borough-wide Article 4 Direction across all borough Town, District and Local Centres to prevent permitted change of use from Use Class E to Use Class C3 (dwelling-house), to protect the Primary Shopping Area – the 'thriving core of the high street'. The Council may wish to consider extending the Article 4 Direction to remove Class G permitted development, which allows the conversion of the upper floors of commercial building into up to two residential flats, or implement policy to protect the ancillary storage areas of shop units to ensure continued viability.

Monitoring

13.30 As advised in the NPPF, it is recommended that the Council should update its retail evidence base at frequent intervals throughout the Local Plan period to 2041, as new information on the economy, population growth, expenditure growth and 'special forms of trading' becomes available. The need to update should be reviewed every 5 years and implemented if needed at that point (NPPF, para.33).

13.31 Updates to retail capacity forecasts will also be required once new floorspace comes forward at throughout the network of town centres and on the Strategic Site Allocations, in order to assess the implications that this development might have on the network of town centres. Further monitoring should also focus on the role of the network of town centres within the wider region/sub-region, the health check analysis of each of the main town centres, the health of the Local Centres, and the quantitative performance of town centre floorspace.

Appendix 1

Convenience Goods Need Assessment

Royal Borough of Kingston upon Thames
Retail and Leisure Needs Assessment 2024

Comparison Goods Retail Need Forecasts

Table 1: Survey Area Postcode Composition

Zone	Postcode Sectors
Zone 1	KT1 1/2/3; KT2 5/6
Zone 2	KT5 8; KT6 4/6
Zone 3	KT5 9; KT6 7
Zone 4	KT2 7; KT3 3/4/5/6
Zone 5	KT9 1; KT9 2
Zone 6	SW14 7/8; TW1 1/2/3/4; TW9 1/2/3/4; TW10 5/6/7; SW11 6; SW12 8/9; SW13 0/8/9; SW15 1/2/3/4/5/6; SW17 0/7/8/9; SW18 1/2/3/4/5; W3 8; W4 1/2/3/4/5
Zone 7	SW19 1/2/3/4/5/6/7/8; SW20 0/8/9; KT4 7/8; SM1 1/2/3/4; SM2 5/6/7; SM3 8/9; SM4 4/5/6; SM5 1/2/3
Zone 8	TW2 5/6/7; TW3 1/2/3/4; TW4 5/6/7; TW5 0/9; TW7 4/5/6/7; TW8 0/8/9; TW13 4/5/6/7; TW14 0/8/9; TW15 1/2/3; TW16 5/6/7; TW17 0/8/9
Zone 9	KT17 1/2/3/4; KT18 5/6/7; KT19 0/7/8/9; KT21 1/2; KT11 1/2/3; KT22 0/7/8/9; KT23 3/4
Zone 10	KT1 4; KT8 0/1/2/9; KT12 2/3; TW11 0/8/9; TW12 1/2/3; KT7 0; KT10 0/8/9; KT12 1/4/5; KT13 0/8/9; KT6 5

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Royal Borough of Kingston upon Thames
Retail and Leisure Needs Assessment 2024

Convenience Goods Retail Need Forecasts

Table 2: Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL
2024	46,748	25,089	21,591	49,471	21,369	397,525	314,676	348,858	148,273	176,648	1,550,248
2029	47,474	25,173	21,929	50,090	21,723	400,480	316,711	350,453	148,866	177,138	1,560,037
2034	47,927	25,134	22,193	50,562	22,042	404,628	318,659	352,238	149,033	177,256	1,569,672
2041	48,655	25,156	22,531	51,228	22,333	412,326	322,911	355,881	149,660	178,784	1,589,465
Change 2024-2029	726	84	338	619	354	2,955	2,035	1,595	593	490	9,789
Change 2029-2034	453	-39	264	472	319	4,148	1,948	1,785	167	118	9,635
Change 2034-2041	728	22	338	666	291	7,698	4,252	3,643	627	1,528	19,793
TOTAL Change 2024 - 2041	***1,907***	***67***	***940***	***1,757***	***964***	***14,801***	***8,235***	***7,023***	***1,387***	***2,136***	***39,217***

Source: Experian

Convenience Goods Retail Need Forecasts

Table 3: Survey Area per Capita Expenditure Forecasts - Convenience Goods

	Expenditure per Capita (£)	SFT (%)	SFT (£)	Expenditure per capita less SFT
2024	2,976	5.2%	155	2,821
2029	2,970	6.3%	187	2,783
2034	2,982	7.0%	209	2,773
2041	3,003	7.4%	222	2,781

Expenditure growth rates: 2024: -0.5%; 2025: -0.2%; 2026-30: 0.0%; 2031-41: 0.1%

Source: Experian E-Marketer. Expenditure growth rates and allowance for SFT are sourced from Experian Retail Planner 21 (February 2024)

Convenience Goods Retail Need Forecasts

Table 4 - Survey Area Convenience Goods Expenditure - Convenience Goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2024	131.9	70.8	60.9	139.6	60.3	1,121.5	887.8	984.2	418.3	498.4	**4,373.6**
2029	132.1	70.1	61.0	139.4	60.5	1,114.5	881.4	975.3	414.3	493.0	**4,341.5**
2034	132.9	69.7	61.5	140.2	61.1	1,122.1	883.7	976.8	413.3	491.6	**4,353.0**
2041	135.3	70.0	62.7	142.4	62.1	1,146.5	897.9	989.6	416.2	497.1	**4,419.8**
Change 2024-2041 (£m)	**3.4**	**-0.8**	**1.7**	**2.9**	**1.8**	**25.0**	**10.1**	**5.4**	**-2.2**	**-1.2**	**46.1**
Change 2024-2041 (%)	**2.6**	**-1.2**	**2.9**	**2.1**	**3.0**	**2.2**	**1.1**	**0.5**	**-0.5**	**-0.2**	**1.1**

Source: Tables 2 and 3

Convenience Goods Retail Need Forecasts

Table 5 - Convenience Goods Allocation - % Market Share (2024)

Survey Location Zone		Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %
1	**Kingston Town Centre**										
	Sainsbury's Eden Walk, Kingston	7.8%	0.5%	2.3%	0.4%	1.2%	0.0%	0.0%	0.4%	0.8%	1.1%
	Waitrose, Wood Street, Kingston	8.1%	0.5%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.3%	2.4%
	Aldi, Adams Walk, Kingston	8.6%	0.2%	2.3%	0.4%	0.0%	0.4%	0.0%	1.3%	1.0%	0.8%
	M&S, Clarence Street, Kingston	5.1%	1.2%	0.5%	0.7%	0.1%	0.3%	0.1%	0.0%	0.0%	1.5%
	Tesco Express, Richmond Road, Kingston	2.2%	0.0%	0.0%	0.3%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
	Other Local Stores, Kingston	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sub-Total	32.6%	2.4%	5.1%	2.3%	1.3%	0.7%	0.2%	1.7%	2.2%	5.8%
1	**Kingston Edge and Out-of-Centre**										
	Sainsbury's, Sury Basin, Kingston (Edge-of-Centre)	19.8%	2.6%	2.4%	0.6%	0.0%	0.7%	0.0%	0.0%	0.0%	1.9%
	Asda, London Road, Kingston (Out-of-Centre)	9.9%	1.9%	2.8%	4.1%	0.0%	0.0%	0.5%	0.0%	0.9%	1.0%
	Lidl, Gordon Road, Kingston (Edge-of-Centre)	8.9%	0.8%	4.2%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sub-Total	*38.7%*	*5.4%*	*9.4%*	*9.7%*	*0.0%*	*0.7%*	*0.5%*	*0.0%*	*0.9%*	*2.9%*
2	**Surbiton District Centre**										
	Sainsbury's Superstore, Victoria Road, Surbiton	0.9%	18.3%	6.1%	0.0%	5.1%	0.2%	0.0%	0.0%	0.0%	2.9%
	Waitrose, Claremont Road, Surbiton	1.4%	30.5%	7.4%	1.4%	4.2%	0.0%	0.0%	0.0%	0.0%	3.4%
	M&S Simply Food, Victoria Road, Surbiton	0.0%	2.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%
	Local Shops, Surbiton District Centre	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sub-Total	*2.3%*	*50.8%*	*14.4%*	*1.4%*	*9.3%*	*0.2%*	*0.0%*	*0.0%*	*0.0%*	*7.8%*
3	**Tolworth District Centre**										
	M&S Simply Food, Tolworth Broadway, Tolworth	0.0%	4.3%	15.2%	1.6%	1.7%	0.0%	0.4%	0.0%	0.1%	0.2%
	Tesco Express (Esso), Tolworth Broadway, Tolworth	0.0%	1.4%	5.9%	0.6%	0.0%	0.8%	0.0%	0.0%	0.0%	1.4%
	Iceland, Tolworth Broadway, Tolworth	0.0%	2.2%	3.4%	1.1%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's Local, Ewell Road, Tolworth	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Local Shops, Tolworth District Centre	0.0%	0.0%	0.5%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sub-Total	*0.0%*	*7.9%*	*26.3%*	*3.3%*	*3.2%*	*0.8%*	*0.4%*	*0.0%*	*0.1%*	*1.7%*
4	**New Malden District Centre**										
	Waitrose, High Street, New Malden	1.3%	0.0%	0.6%	23.6%	0.4%	0.0%	0.2%	0.0%	0.0%	0.0%
	Tesco Express, High Street, New Malden	0.0%	0.1%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	M&S, High Street, New Malden	0.0%	0.0%	0.3%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Lidl, Blagdon Road, New Malden	0.1%	0.0%	3.0%	7.7%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%
	Local Shops, New Malden District Centre	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sub-Total	*1.5%*	*0.1%*	*4.0%*	*38.2%*	*0.4%*	*0.0%*	*1.1%*	*0.0%*	*0.0%*	*0.0%*
	Other Edge and Out-of-Centre, Borough-wide										
4	Aldi, Kingston Road, New Malden (Edge of Centre)	1.4%	0.3%	2.7%	8.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Sainsbury's Local, Coombe Road, Norbiton (Edge-of-Centre)	0.8%	2.1%	0.0%	0.9%	0.0%	0.0%	1.3%	0.0%	0.0%	0.5%
5	Lidl, Leatherhead Road, Chessington (Out-of-Centre)	0.0%	0.9%	1.4%	0.1%	23.9%	0.0%	0.0%	0.0%	0.1%	1.4%
1	Co-Op, King's Road, Kingston (Out-of-Centre)	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Waitrose Little, Shell Petrol Station, Richmond Road (Edge-of-Centre)	3.2%	0.0%	0.0%	0.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
	Sub-Total	*10.5%*	*3.2%*	*4.1%*	*9.1%*	*23.9%*	*0.8%*	*1.3%*	*0.0%*	*0.1%*	*1.9%*
	Local Centres										
10	Ace of Spades Local Centre (No.1) (Tesco Express)	0.0%	0.9%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Alexandra Drive Local Centre (No.2) (*Edge of Centre*) (Sainsbury's Local)	0.0%	6.1%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Berrylands Road Local Centre (No.3) (Londis)	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Chessington North Parade Local Centre (No.6) (Sainsbury's Local)	0.0%	0.0%	0.0%	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Ewell Road North Local Centre (No.9) (Sainsbury's Local)	0.0%	5.7%	1.1%	0.0%	1.8%	0.0%	0.0%	0.0%	0.8%	1.7%
3	Ewell Road South Local Centre (No.10) (Co-Op)	0.0%	1.3%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
5	Hook Parade Local Centre (No.11) (Sainsbury's Local)	0.0%	0.0%	0.0%	0.0%	9.5%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Hook Parade Local Centre (No.11) (Tesco Express)	0.0%	0.0%	0.2%	0.0%	8.2%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Kingston Hill/Park Road Local Centre (No.12) (Waitrose Little)	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
4	Malden Manor Local Centre (No.17) (*Edge of Centre*) (Co-Op)	0.0%	0.0%	1.7%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
7	Plough Green Local Centre (No.18) (Tesco Express)	0.1%	0.0%	0.0%	0.5%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%
1	The Triangle Local Centre (No.22) (Tesco Express)	0.7%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Villiers Avenue Local Centre (No.24) (Co-Op)	0.5%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sub-Total	*1.4%*	*15.6%*	*11.3%*	*2.9%*	*24.9%*	*0.4%*	*0.5%*	*0.0%*	*0.8%*	*2.1%*
	Total Kingston upon Thames	**87.0%**	**85.5%**	**74.5%**	**66.9%**	**63.1%**	**3.6%**	**4.1%**	**1.7%**	**4.0%**	**22.2%**
	Destinations for Convenience Goods Outside Royal Borough of Kingston upon Thames										
4	Tesco Extra, Beverley Way, New Malden	2.4%	7.5%	11.5%	10.2%	10.1%	0.6%	2.1%	0.0%	1.7%	1.8%
6	Asda, Roehampton Vale, Roehampton	0.0%	1.2%	0.3%	1.5%	0.4%	3.7%	3.1%	0.0%	0.4%	0.6%
6	Sainsbury's Superstore, Lower Richmond Road, Richmond	3.3%	0.0%	0.0%	0.0%	0.0%	5.2%	0.0%	0.0%	0.0%	0.0%
7	Tesco Express (Esso), London Road, North Cheam	1.0%	0.0%	0.0%	2.4%	0.0%	0.7%	2.2%	1.7%	2.1%	0.5%
7	Sainsbury's Superstore, London Road, North Cheam	0.0%	0.0%	0.3%	2.0%	0.0%	0.3%	15.3%	0.0%	0.4%	0.1%
9	Aldi, Kingston Road, Ewell	0.0%	0.3%	1.9%	0.3%	2.5%	0.0%	0.9%	0.0%	2.3%	1.2%
9	Sainsbury's Superstore, Kiln Lane, Epsom	0.0%	0.5%	1.7%	0.0%	8.2%	0.0%	0.5%	0.0%	10.7%	0.0%
9	Tesco Superstore, Oxshott Road, Leatherhead	0.0%	0.0%	0.3%	1.2%	8.1%	0.0%	0.0%	0.0%	12.0%	0.1%
9	Sainsbury's Superstore, Bridgeway, Cobham	0.0%	0.0%	1.8%	0.1%	0.5%	0.0%	0.0%	0.0%	4.0%	4.2%
10	Tesco Extra, Barns Wallis Drive, Weybridge	0.0%	0.0%	1.6%	0.0%	1.2%	0.0%	0.0%	0.5%	0.8%	2.1%
10	Aldi, Bridge Street, Walton-on-Thames	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	4.6%
	Sub-Total	*6.6%*	*9.6%*	*20.7%*	*17.8%*	*30.9%*	*10.4%*	*24.0%*	*2.4%*	*34.4%*	*15.2%*
	ALL DESTINATIONS [listed above]	**93.6%**	**95.0%**	**95.2%**	**84.6%**	**94.0%**	**14.0%**	**28.0%**	**4.1%**	**38.4%**	**37.4%**
	OTHER DESTINATIONS	**6.4%**	**5.0%**	**4.8%**	**15.4%**	**6.0%**	**86.0%**	**72.0%**	**95.9%**	**61.6%**	**62.6%**

*Notes: * List includes those mentioned and most used by survey respondents. Some centres or parades not cited by survey respondents. Results highlight the most dominant destinations.*

Convenience Goods Retail Need Forecasts

Table 6 - Convenience Goods Allocation - Spend (£) 2024

Survey Location Zone		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Total £m	Total %
	Total Available Convenience Goods Spend - 2024 (£m)	**131.9**	**70.8**	**60.9**	**139.6**	**60.3**	**1121.5**	**887.8**	**984.2**	**418.3**	**498.4**	**4,373.6**	**100.0**
	Destinations for Convenience Goods in Royal Borough of Kingston upon Thames												
												£M	%
1	**Kingston Town Centre**												
	Sainsbury's Eden Walk, Kingston	10.3	0.4	1.4	0.5	0.7	0.0	0.0	3.9	3.4	5.6	26.3	0.6
	Waitrose, Wood Street, Kingston	10.7	0.3	0.0	0.7	0.0	0.0	0.0	0.0	1.3	11.8	24.8	0.6
	Aldi, Adams Walk, Kingston	11.3	0.2	1.4	0.6	0.0	4.5	0.0	12.8	4.3	4.0	39.1	0.9
	M&S, Clarence Street, Kingston	6.7	0.8	0.3	1.0	0.0	3.4	1.0	0.0	0.0	7.7	21.0	0.5
	Tesco Express, Richmond Road, Kingston	2.9	0.0	0.0	0.4	0.0	0.0	0.7	0.0	0.0	0.0	4.0	0.1
	Other Local Stores, Kingston	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0
	Sub-Total	43.0	1.7	3.1	3.2	0.8	7.9	1.7	16.7	9.1	29.1	116.2	2.7
1	**Kingston Edge and Out-of-Centre**												
	Sainsbury's, Sury Basin, Kingston (Edge-of-Centre)	26.1	1.8	1.5	0.9	0.0	8.0	0.0	0.0	0.0	9.3	47.7	1.1
	Asda, London Road, Kingston (Out-of-Centre)	13.1	1.4	1.7	5.7	0.0	0.0	4.3	0.0	3.6	5.1	34.8	0.8
	Lidl, Gordon Road, Kingston (Edge-of-Centre)	11.7	0.6	2.6	6.9	0.0	0.0	0.0	0.0	0.0	0.0	21.8	0.5
	Sub-Total	51.0	3.8	5.7	13.5	0.0	8.0	4.3	0.0	3.6	14.4	104.3	2.4
2	**Surbiton District Centre**												
	Sainsbury's Superstore, Victoria Road, Surbiton	1.2	13.0	3.7	0.0	3.1	1.9	0.0	0.0	0.0	14.4	37.3	0.9
	Waitrose, Claremont Road, Surbiton	1.9	21.6	4.5	2.0	2.5	0.0	0.0	0.0	0.0	16.7	49.2	1.1
	M&S Simply Food, Victoria Road, Surbiton	0.0	1.5	0.4	0.0	0.0	0.0	0.0	0.0	0.0	7.8	9.6	0.2
	Local Shops, Surbiton District Centre	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0
	Sub-Total	3.1	36.0	8.8	2.0	5.6	1.9	0.0	0.0	0.0	38.9	96.3	2.2
3	**Tolworth District Centre**												
	M&S Simply Food, Tolworth Broadway, Tolworth	0.0	3.1	9.3	2.2	1.0	0.0	3.9	0.0	0.4	1.1	21.0	0.5
	Tesco Express (Esso), Tolworth Broadway, Tolworth	0.0	1.0	3.6	0.8	0.0	9.0	0.0	0.0	0.0	7.2	21.5	0.5
	Iceland, Tolworth Broadway, Tolworth	0.0	1.5	2.1	1.5	0.6	0.0	0.0	0.0	0.0	0.0	5.7	0.1
	Sainsbury's Local, Ewell Road, Tolworth	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0
	Local Shops, Tolworth District Centre	0.0	0.0	0.3	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.6	0.0
	Sub-Total	0.0	5.6	16.0	4.5	1.9	9.0	3.9	0.0	0.4	8.3	49.6	1.1
4	**New Malden District Centre**												
	Waitrose, High Street, New Malden	1.8	0.0	0.4	32.9	0.2	0.0	1.6	0.0	0.0	0.0	36.9	0.8
	Tesco Express, High Street, New Malden	0.0	0.1	0.0	6.4	0.0	0.0	0.0	0.0	0.0	0.0	6.5	0.1
	M&S, High Street, New Malden	0.0	0.0	0.2	1.6	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0
	Lidl, Blagdon Road, New Malden	0.2	0.0	1.9	10.7	0.0	0.0	8.5	0.0	0.0	0.0	21.3	0.5
	Local Shops, New Malden District Centre	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0
	Sub-Total	1.9	0.1	2.4	53.3	0.2	0.0	10.2	0.0	0.0	0.0	68.2	1.6
	Other Edge and Out-of-Centre, Borough-wide												
4	Aldi, Kingston Road, New Malden (Edge of Centre)	1.9	0.2	1.7	11.1	0.0	0.0	0.0	0.0	0.0	0.0	14.9	0.3
4	Sainsbury's Local, Coombe Road, Norbiton (Edge-of-Centre)	1.0	1.5	0.0	1.2	0.0	0.0	11.7	0.0	0.0	2.6	18.0	0.4
5	Lidl, Leatherhead Road, Chessington (Out-of-Centre)	0.0	0.6	0.8	0.2	14.4	0.0	0.0	0.0	0.4	7.0	23.4	0.5
1	Co-Op, King's Road, Kingston (Out-of-Centre)	6.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.8	0.2
1	Waitrose Little, Shell Petrol Station, Richmond Road (Edge-of-Centre)	4.2	0.0	0.0	0.1	0.0	9.0	0.0	0.0	0.0	0.0	13.3	0.3
	Sub-Total	13.9	2.3	2.5	12.7	14.4	9.0	11.7	0.0	0.4	9.6	76.4	1.7
	Local Centres												
10	Ace of Spades Local Centre (No.1) (Tesco Express)	0.0	0.7	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0
3	Alexandra Drive Local Centre (No.2) (*Edge of Centre*) (Sainsbury's Local)	0.0	4.3	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.6	0.2
2	Berrylands Road Local Centre (No.3) (Londis)	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
5	Chessington North Parade Local Centre (No.6) (Sainsbury's Local)	0.0	0.0	0.0	0.0	3.3	0.0	0.0	0.0	0.0	0.0	3.3	0.1
2	Ewell Road North Local Centre (No.9) (Sainsbury's Local)	0.0	4.0	0.7	0.0	1.1	0.0	0.0	0.0	3.3	8.4	17.5	0.4
3	Ewell Road South Local Centre (No.10) (Co-Op)	0.0	0.9	1.3	0.0	0.0	0.0	0.0	0.0	0.0	2.1	4.3	0.1
5	Hook Parade Local Centre (No.11) (Sainsbury's Local)	0.0	0.0	0.0	0.0	5.7	0.0	0.0	0.0	0.0	0.0	5.7	0.1
5	Hook Parade Local Centre (No.11) (Tesco Express)	0.0	0.0	0.1	0.0	4.9	0.0	0.0	0.0	0.0	0.0	5.0	0.1
1	Kingston Hill/Park Road Local Centre (No.12) (Waitrose Little)	0.1	0.0	0.0	0.0	0.0	4.5	0.0	0.0	0.0	0.0	4.6	0.1
4	Malden Manor Local Centre (No.17) (*Edge of Centre*) (Co-Op)	0.0	0.0	1.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.1
7	Plough Green Local Centre (No.18) (Tesco Express)	0.1	0.0	0.0	0.6	0.0	0.0	4.3	0.0	0.0	0.0	5.1	0.1
1	The Triangle Local Centre (No.22) (Tesco Express)	0.9	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.1
2	Villiers Avenue Local Centre (No.24) (Co-Op)	0.6	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0
	Sub-Total	1.8	11.1	6.9	4.1	15.0	4.5	4.3	0.0	3.3	10.5	61.5	1.4
	Total Kingston upon Thames	**114.7**	**60.5**	**45.4**	**93.3**	**38.0**	**40.2**	**36.0**	**16.7**	**16.8**	**110.8**	**572.4**	**13.1**
	Destinations for Convenience Goods Outside Royal Borough of Kingston upon Thames												
4	Tesco Extra, Beverley Way, New Malden	3.1	5.3	7.0	14.3	6.1	6.6	18.5	0.0	6.9	8.9	76.9	1.8
6	Asda, Roehampton Vale, Roehampton	0.0	0.9	0.2	2.2	0.2	41.2	27.5	0.0	1.8	3.1	76.9	1.8
6	Sainsbury's Superstore, Lower Richmond Road, Richmond	4.3	0.0	0.0	0.0	0.0	57.9	0.0	0.0	0.0	0.0	62.2	1.4
7	Tesco Express (Esso), London Road, North Cheam	1.3	0.0	0.0	3.4	0.0	8.0	19.4	16.6	8.9	2.5	60.1	1.4
7	Sainsbury's Superstore, London Road, North Cheam	0.0	0.0	0.2	2.8	0.0	3.1	135.5	0.0	1.7	0.6	143.8	3.3
9	Aldi, Kingston Road, Ewell	0.0	0.2	1.2	0.4	1.5	0.0	7.7	0.0	9.5	5.8	26.1	0.6
9	Sainsbury's Superstore, Kiln Lane, Epsom	0.0	0.4	1.0	0.0	4.9	0.0	4.1	0.0	44.6	0.0	55.1	1.3
9	Tesco Superstore, Oxshott Road, Leatherhead	0.0	0.0	0.2	1.6	4.9	0.0	0.0	0.0	50.3	0.6	57.5	1.3
9	Sainsbury's Superstore, Bridgeway, Cobham	0.0	0.0	1.1	0.2	0.3	0.0	0.0	0.0	16.6	21.1	39.3	0.9
10	Tesco Extra, Barns Wallis Drive, Weybridge	0.0	0.0	1.0	0.0	0.7	0.0	0.0	4.5	3.5	10.4	19.9	0.5
10	Aldi, Bridge Street, Walton-on-Thames	0.0	0.0	0.8	0.0	0.0	0.0	0.0	2.6	0.0	22.9	26.2	0.6
	Sub-Total	8.7	6.8	12.6	24.8	18.7	116.8	212.6	23.6	143.8	75.7	644.0	14.7
	ALL DESTINATIONS [listed above]	**123.4**	**67.3**	**58.0**	**118.1**	**56.7**	**157.0**	**248.6**	**40.4**	**160.6**	**186.5**	**1,216.5**	**27.8**
	OTHER DESTINATIONS	**8.5**	**3.5**	**2.9**	**21.5**	**3.6**	**964.5**	**639.2**	**943.9**	**257.7**	**311.9**	**3,157.2**	**72.2**

Royal Borough of Kingston upon Thames
Retail and Leisure Needs Assessment 2024

Convenience Goods Retail Need Forecasts

Table 7 - Convenience Goods Allocation - Spend (£) 2029

Survey Location Zone		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Total £m	Total %
	Total Available Convenience Goods Spend - 2029 (£m)	**132.1**	**70.1**	**61.0**	**139.4**	**60.5**	**1,114.5**	**881.4**	**975.3**	**414.3**	**493.0**	**4,341.5**	**100.0**
	Destinations for Convenience Goods in Royal Borough of Kingston upon Thames												
												£M	%
1	**Kingston Town Centre**												
	Sainsbury's Eden Walk, Kingston	10.3	0.4	1.4	0.5	0.7	0.0	0.0	3.9	3.4	5.5	26.2	0.6
	Waitrose, Wood Street, Kingston	10.7	0.3	0.0	0.7	0.0	0.0	0.0	0.0	1.3	11.6	24.7	0.6
	Aldi, Adams Walk, Kingston	11.4	0.2	1.4	0.6	0.0	4.5	0.0	12.7	4.3	4.0	38.9	0.9
	M&S, Clarence Street, Kingston	6.7	0.8	0.3	1.0	0.0	3.3	1.0	0.0	0.0	7.6	20.9	0.5
	Tesco Express, Richmond Road, Kingston	2.9	0.0	0.0	0.4	0.0	0.0	0.7	0.0	0.0	0.0	4.0	0.1
	Other Local Stores, Kingston	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0
	Sub-Total	43.1	1.7	3.1	3.2	0.8	7.8	1.7	16.6	9.0	28.8	115.7	2.7
1	**Kingston Edge and Out-of-Centre**												
	Sainsbury's, Sury Basin, Kingston (Edge-of-Centre)	26.2	1.8	1.5	0.9	0.0	8.0	0.0	0.0	0.0	9.2	47.6	1.1
	Asda, London Road, Kingston (Out-of-Centre)	13.1	1.3	1.7	5.7	0.0	0.0	4.2	0.0	3.5	5.1	34.7	0.8
	Lidl, Gordon Road, Kingston (Edge-of-Centre)	11.7	0.6	2.6	6.9	0.0	0.0	0.0	0.0	0.0	0.0	21.8	0.5
	Sub-Total	51.1	3.8	5.7	13.5	0.0	8.0	4.2	0.0	3.5	14.3	104.1	2.4
2	**Surbiton District Centre**												
	Sainsbury's Superstore, Victoria Road, Surbiton	1.2	12.8	3.7	0.0	3.1	1.9	0.0	0.0	0.0	14.3	37.0	0.9
	Waitrose, Claremont Road, Surbiton	1.9	21.3	4.5	2.0	2.5	0.0	0.0	0.0	0.0	16.5	48.8	1.1
	M&S Simply Food, Victoria Road, Surbiton	0.0	1.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	7.7	9.5	0.2
	Local Shops, Surbiton District Centre	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0
	Sub-Total	3.1	35.6	8.8	2.0	5.6	1.9	0.0	0.0	0.0	38.5	95.5	2.2
3	**Tolworth District Centre**												
	M&S Simply Food, Tolworth Broadway, Tolworth	0.0	3.0	9.3	2.2	1.0	0.0	3.8	0.0	0.4	1.1	20.9	0.5
	Tesco Express (Esso), Tolworth Broadway, Tolworth	0.0	1.0	3.6	0.8	0.0	8.9	0.0	0.0	0.0	7.1	21.4	0.5
	Iceland, Tolworth Broadway, Tolworth	0.0	1.5	2.1	1.5	0.6	0.0	0.0	0.0	0.0	0.0	5.7	0.1
	Sainsbury's Local, Ewell Road, Tolworth	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0
	Local Shops, Tolworth District Centre	0.0	0.0	0.3	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.6	0.0
	Sub-Total	0.0	5.5	16.0	4.5	1.9	8.9	3.8	0.0	0.4	8.2	49.4	1.1
4	**New Malden District Centre**												
	Waitrose, High Street, New Malden	1.8	0.0	0.4	32.9	0.2	0.0	1.6	0.0	0.0	0.0	36.9	0.8
	Tesco Express, High Street, New Malden	0.0	0.1	0.0	6.4	0.0	0.0	0.0	0.0	0.0	0.0	6.5	0.1
	M&S, High Street, New Malden	0.0	0.0	0.2	1.6	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0
	Lidl, Blagdon Road, New Malden	0.2	0.0	1.9	10.7	0.0	0.0	8.5	0.0	0.0	0.0	21.2	0.5
	Local Shops, New Malden District Centre	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0
	Sub-Total	1.9	0.1	2.4	53.2	0.2	0.0	10.1	0.0	0.0	0.0	68.0	1.6
	Other Edge and Out-of-Centre, Borough-wide												
4	Aldi, Kingston Road, New Malden (Edge of Centre)	1.9	0.2	1.7	11.1	0.0	0.0	0.0	0.0	0.0	0.0	14.9	0.3
4	Sainsbury's Local, Coombe Road, Norbiton (Edge-of-Centre	1.0	1.5	0.0	1.2	0.0	0.0	11.6	0.0	0.0	2.5	17.9	0.4
5	Lidl, Leatherhead Road, Chessington (Out-of-Centre)	0.0	0.6	0.8	0.2	14.5	0.0	0.0	0.0	0.4	6.9	23.4	0.5
1	Co-Op, King's Road, Kingston (Out-of-Centre)	6.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.8	0.2
1	Waitrose Little, Shell Petrol Station, Richmond Road (Edge	4.2	0.0	0.0	0.1	0.0	8.9	0.0	0.0	0.0	0.0	13.3	0.3
	Sub-Total	13.9	2.3	2.5	12.7	14.5	8.9	11.6	0.0	0.4	9.4	76.2	1.8
	Local Centres												
10	Ace of Spades Local Centre (No.1) (Tesco Express)	0.0	0.6	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0
3	Alexandra Drive Local Centre (No.2) (*Edge of Centre*) (Sain	0.0	4.3	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.6	0.2
2	Berrylands Road Local Centre (No.3) (Londis)	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
5	Chessington North Parade Local Centre (No.6) (Sainsbury's	0.0	0.0	0.0	0.0	3.3	0.0	0.0	0.0	0.0	0.0	3.3	0.1
2	Ewell Road North Local Centre (No.9) (Sainsbury's Local)	0.0	4.0	0.7	0.0	1.1	0.0	0.0	0.0	3.3	8.3	17.4	0.4
3	Ewell Road South Local Centre (No.10) (Co-Op)	0.0	0.9	1.3	0.0	0.0	0.0	0.0	0.0	0.0	2.1	4.3	0.1
5	Hook Parade Local Centre (No.11) (Sainsbury's Local)	0.0	0.0	0.0	0.0	5.7	0.0	0.0	0.0	0.0	0.0	5.7	0.1
5	Hook Parade Local Centre (No.11) (Tesco Express)	0.0	0.0	0.1	0.0	4.9	0.0	0.0	0.0	0.0	0.0	5.1	0.1
1	Kingston Hill/Park Road Local Centre (No.12) (Waitrose Lit	0.1	0.0	0.0	0.0	0.0	4.5	0.0	0.0	0.0	0.0	4.6	0.1
4	Malden Manor Local Centre (No.17) (*Edge of Centre*) (Co-	0.0	0.0	1.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.1
7	Plough Green Local Centre (No.18) (Tesco Express)	0.1	0.0	0.0	0.6	0.0	0.0	4.3	0.0	0.0	0.0	5.0	0.1
1	The Triangle Local Centre (No.22) (Tesco Express)	0.9	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.1
2	Villiers Avenue Local Centre (No.24) (Co-Op)	0.6	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0
	Sub-Total	1.8	11.0	6.9	4.1	15.1	4.5	4.3	0.0	3.3	10.4	61.2	1.4
	Total Kingston upon Thames	**114.9**	**59.9**	**45.5**	**93.2**	**38.1**	**40.0**	**35.7**	**16.6**	**16.6**	**109.6**	**570.1**	**13.1**
	Destinations for Convenience Goods Outside Royal Borough of Kingston upon Thames												
4	Tesco Extra, Beverley Way, New Malden	3.1	5.3	7.0	14.3	6.1	6.6	18.4	0.0	6.9	8.8	76.5	1.8
6	Asda, Roehampton Vale, Roehampton	0.0	0.8	0.2	2.2	0.3	40.9	27.3	0.0	1.8	3.0	76.4	1.8
6	Sainsbury's Superstore, Lower Richmond Road, Richmond	4.3	0.0	0.0	0.0	0.0	57.5	0.0	0.0	0.0	0.0	61.8	1.4
7	Tesco Express (Esso), London Road, North Cheam	1.3	0.0	0.0	3.4	0.0	8.0	19.2	16.4	8.9	2.5	59.7	1.4
7	Sainsbury's Superstore, London Road, North Cheam	0.0	0.0	0.2	2.8	0.0	3.0	134.5	0.0	1.7	0.6	142.8	3.3
9	Aldi, Kingston Road, Ewell	0.0	0.2	1.2	0.4	1.5	0.0	7.6	0.0	9.4	5.7	25.9	0.6
9	Sainsbury's Superstore, Kiln Lane, Epsom	0.0	0.4	1.0	0.0	5.0	0.0	4.1	0.0	44.2	0.0	54.6	1.3
9	Tesco Superstore, Oxshott Road, Leatherhead	0.0	0.0	0.2	1.6	4.9	0.0	0.0	0.0	49.8	0.6	57.1	1.3
9	Sainsbury's Superstore, Bridgeway, Cobham	0.0	0.0	1.1	0.2	0.3	0.0	0.0	0.0	16.5	20.8	38.9	0.9
10	Tesco Extra, Barns Wallis Drive, Weybridge	0.0	0.0	1.0	0.0	0.7	0.0	0.0	4.4	3.4	10.2	19.8	0.5
10	Aldi, Bridge Street, Walton-on-Thames	0.0	0.0	0.8	0.0	0.0	0.0	0.0	2.6	0.0	22.6	25.9	0.6
	Sub-Total	8.7	6.7	12.6	24.8	18.7	116.0	211.1	23.4	142.4	74.9	639.3	14.7
	ALL DESTINATIONS [listed above]	**123.6**	**66.6**	**58.1**	**118.0**	**56.8**	**156.0**	**246.8**	**40.0**	**159.0**	**184.5**	**1,209.4**	**27.9**
	OTHER DESTINATIONS	**8.5**	**3.5**	**3.0**	**21.4**	**3.6**	**958.5**	**634.6**	**935.3**	**255.3**	**308.5**	**3,132.1**	**72.1**

Convenience Goods Retail Need Forecasts

Table 8 - Convenience Goods Allocation - Spend (£) 2034

Survey Location Zone		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Total £m	Total %
	Total Available Convenience Goods Spend - 2034 (£m)	**132.9**	**69.7**	**61.5**	**140.2**	**61.1**	**1122.1**	**883.7**	**976.8**	**413.3**	**491.6**	**4,353.0**	**100.0**
	Destinations for Convenience Goods in Royal Borough of Kingston upon Thames												
												£M	%
1	**Kingston Town Centre**												
	Sainsbury's Eden Walk, Kingston	10.4	0.4	1.4	0.5	0.8	0.0	0.0	3.9	3.4	5.5	26.3	0.6
	Waitrose, Wood Street, Kingston	10.8	0.3	0.0	0.7	0.0	0.0	0.0	0.0	1.3	11.6	24.7	0.6
	Aldi, Adams Walk, Kingston	11.4	0.2	1.4	0.6	0.0	4.5	0.0	12.7	4.3	4.0	39.0	0.9
	M&S, Clarence Street, Kingston	6.8	0.8	0.3	1.0	0.0	3.4	1.0	0.0	0.0	7.6	20.9	0.5
	Tesco Express, Richmond Road, Kingston	2.9	0.0	0.0	0.4	0.0	0.0	0.7	0.0	0.0	0.0	4.0	0.1
	Other Local Stores, Kingston	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0
	Sub-Total	43.3	1.7	3.1	3.2	0.8	7.9	1.7	16.6	9.0	28.7	115.9	2.7
1	**Kingston Edge and Out-of-Centre**												
	Sainsbury's, Sury Basin, Kingston (Edge-of-Centre)	26.3	1.8	1.5	0.9	0.0	8.0	0.0	0.0	0.0	9.2	47.8	1.1
	Asda, London Road, Kingston (Out-of-Centre)	13.2	1.3	1.7	5.7	0.0	0.0	4.2	0.0	3.5	5.1	34.8	0.8
	Lidl, Gordon Road, Kingston (Edge-of-Centre)	11.8	0.6	2.6	7.0	0.0	0.0	0.0	0.0	0.0	0.0	21.9	0.5
	Sub-Total	51.4	3.7	5.8	13.6	0.0	8.0	4.2	0.0	3.5	14.2	104.5	2.4
2	**Surbiton District Centre**												
	Sainsbury's Superstore, Victoria Road, Surbiton	1.2	12.8	3.8	0.0	3.1	1.9	0.0	0.0	0.0	14.2	37.0	0.9
	Waitrose, Claremont Road, Surbiton	1.9	21.2	4.5	2.0	2.6	0.0	0.0	0.0	0.0	16.5	48.7	1.1
	M&S Simply Food, Victoria Road, Surbiton	0.0	1.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	7.6	9.4	0.2
	Local Shops, Surbiton District Centre	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0
	Sub-Total	3.1	35.4	8.9	2.0	5.7	1.9	0.0	0.0	0.0	38.4	95.4	2.2
3	**Tolworth District Centre**												
	M&S Simply Food, Tolworth Broadway, Tolworth	0.0	3.0	9.4	2.3	1.0	0.0	3.8	0.0	0.4	1.1	21.0	0.5
	Tesco Express (Esso), Tolworth Broadway, Tolworth	0.0	1.0	3.6	0.8	0.0	9.0	0.0	0.0	0.0	7.1	21.5	0.5
	Iceland, Tolworth Broadway, Tolworth	0.0	1.5	2.1	1.5	0.6	0.0	0.0	0.0	0.0	0.0	5.7	0.1
	Sainsbury's Local, Ewell Road, Tolworth	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0
	Local Shops, Tolworth District Centre	0.0	0.0	0.3	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.6	0.0
	Sub-Total	0.0	5.5	16.2	4.6	1.9	9.0	3.8	0.0	0.4	8.2	49.6	1.1
4	**New Malden District Centre**												
	Waitrose, High Street, New Malden	1.8	0.0	0.4	33.1	0.2	0.0	1.6	0.0	0.0	0.0	37.1	0.9
	Tesco Express, High Street, New Malden	0.0	0.1	0.0	6.4	0.0	0.0	0.0	0.0	0.0	0.0	6.5	0.2
	M&S, High Street, New Malden	0.0	0.0	0.2	1.6	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0
	Lidl, Blagdon Road, New Malden	0.2	0.0	1.9	10.8	0.0	0.0	8.5	0.0	0.0	0.0	21.3	0.5
	Local Shops, New Malden District Centre	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0
	Sub-Total	2.0	0.1	2.4	53.5	0.2	0.0	10.1	0.0	0.0	0.0	68.4	1.6
	Other Edge and Out-of-Centre, Borough-wide												
4	Aldi, Kingston Road, New Malden (Edge of Centre)	1.9	0.2	1.7	11.2	0.0	0.0	0.0	0.0	0.0	0.0	15.0	0.3
4	Sainsbury's Local, Coombe Road, Norbiton (Edge-of-Centre	1.0	1.4	0.0	1.3	0.0	0.0	11.6	0.0	0.0	2.5	17.9	0.4
5	Lidl, Leatherhead Road, Chessington (Out-of-Centre)	0.0	0.6	0.8	0.2	14.6	0.0	0.0	0.0	0.4	6.9	23.5	0.5
1	Co-Op, King's Road, Kingston (Out-of-Centre)	6.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.8	0.2
1	Waitrose Little, Shell Petrol Station, Richmond Road (Edge	4.2	0.0	0.0	0.1	0.0	9.0	0.0	0.0	0.0	0.0	13.3	0.3
	Sub-Total	14.0	2.3	2.5	12.8	14.6	9.0	11.6	0.0	0.4	9.4	76.6	1.8
	Local Centres												
10	Ace of Spades Local Centre (No.1) (Tesco Express)	0.0	0.6	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0
3	Alexandra Drive Local Centre (No.2) (*Edge of Centre*) (Sain	0.0	4.3	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.6	0.2
2	Berrylands Road Local Centre (No.3) (Londis)	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
5	Chessington North Parade Local Centre (No.6) (Sainsbury's	0.0	0.0	0.0	0.0	3.4	0.0	0.0	0.0	0.0	0.0	3.4	0.1
2	Ewell Road North Local Centre (No.9) (Sainsbury's Local)	0.0	4.0	0.7	0.0	1.1	0.0	0.0	0.0	3.3	8.3	17.3	0.4
3	Ewell Road South Local Centre (No.10) (Co-Op)	0.0	0.9	1.3	0.0	0.0	0.0	0.0	0.0	0.0	2.1	4.3	0.1
5	Hook Parade Local Centre (No.11) (Sainsbury's Local)	0.0	0.0	0.0	0.0	5.8	0.0	0.0	0.0	0.0	0.0	5.8	0.1
5	Hook Parade Local Centre (No.11) (Tesco Express)	0.0	0.0	0.1	0.0	5.0	0.0	0.0	0.0	0.0	0.0	5.1	0.1
1	Kingston Hill/Park Road Local Centre (No.12) (Waitrose Lit	0.1	0.0	0.0	0.0	0.0	4.5	0.0	0.0	0.0	0.0	4.6	0.1
4	Malden Manor Local Centre (No.17) (*Edge of Centre*) (Co-	0.0	0.0	1.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.1
7	Plough Green Local Centre (No.18) (Tesco Express)	0.1	0.0	0.0	0.6	0.0	0.0	4.3	0.0	0.0	0.0	5.0	0.1
1	The Triangle Local Centre (No.22) (Tesco Express)	0.9	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.1
2	Villiers Avenue Local Centre (No.24) (Co-Op)	0.6	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0
	Sub-Total	1.8	10.9	6.9	4.1	15.2	4.5	4.3	0.0	3.3	10.4	61.5	1.4
	Total Kingston upon Thames	**115.6**	**59.6**	**45.8**	**93.8**	**38.6**	**40.3**	**35.8**	**16.6**	**16.6**	**109.3**	**571.9**	**13.1**
	Destinations for Convenience Goods Outside Royal Borough of Kingston upon Thames												
4	Tesco Extra, Beverley Way, New Malden	3.1	5.2	7.1	14.4	6.2	6.6	18.4	0.0	6.8	8.8	76.7	1.8
6	Asda, Roehampton Vale, Roehampton	0.0	0.8	0.2	2.2	0.3	41.2	27.3	0.0	1.8	3.0	76.8	1.8
6	Sainsbury's Superstore, Lower Richmond Road, Richmond	4.3	0.0	0.0	0.0	0.0	57.9	0.0	0.0	0.0	0.0	62.2	1.4
7	Tesco Express (Esso), London Road, North Cheam	1.3	0.0	0.0	3.4	0.0	8.0	19.3	16.4	8.8	2.5	59.8	1.4
7	Sainsbury's Superstore, London Road, North Cheam	0.0	0.0	0.2	2.8	0.0	3.1	134.9	0.0	1.7	0.6	143.1	3.3
9	Aldi, Kingston Road, Ewell	0.0	0.2	1.2	0.4	1.5	0.0	7.6	0.0	9.3	5.7	25.9	0.6
9	Sainsbury's Superstore, Kiln Lane, Epsom	0.0	0.4	1.0	0.0	5.0	0.0	4.1	0.0	44.1	0.0	54.6	1.3
9	Tesco Superstore, Oxshott Road, Leatherhead	0.0	0.0	0.2	1.6	4.9	0.0	0.0	0.0	49.7	0.6	57.0	1.3
9	Sainsbury's Superstore, Bridgeway, Cobham	0.0	0.0	1.1	0.2	0.3	0.0	0.0	0.0	16.4	20.8	38.8	0.9
10	Tesco Extra, Barns Wallis Drive, Weybridge	0.0	0.0	1.0	0.0	0.7	0.0	0.0	4.4	3.4	10.2	19.7	0.5
10	Aldi, Bridge Street, Walton-on-Thames	0.0	0.0	0.8	0.0	0.0	0.0	0.0	2.6	0.0	22.5	25.9	0.6
	Sub-Total	8.8	6.7	12.7	24.9	18.9	116.8	211.7	23.4	142.1	74.7	640.6	14.7
	ALL DESTINATIONS [listed above]	**124.4**	**66.3**	**58.6**	**118.7**	**57.5**	**157.1**	**247.4**	**40.1**	**158.6**	**183.9**	**1,212.5**	**27.9**
	OTHER DESTINATIONS	**8.5**	**3.5**	**3.0**	**21.6**	**3.6**	**965.0**	**636.3**	**936.8**	**254.7**	**307.6**	**3,140.5**	**72.1**

Royal Borough of Kingston upon Thames
Retail and Leisure Needs Assessment 2024

Convenience Goods Retail Need Forecasts

Table 9 - Convenience Goods Allocation - Spend (£) 2041

Survey Location Zone		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Total £m	Total %
	Total Available Convenience Goods Spend - 2041 (£m)	**135.3**	**70.0**	**62.7**	**142.4**	**62.1**	**1146.5**	**897.9**	**989.6**	**416.2**	**497.1**	**4,419.8**	**100.0**
	Destinations for Convenience Goods in Royal Borough of Kingston upon Thames												
												£M	%
1	**Kingston Town Centre**												
	Sainsbury's Eden Walk, Kingston	10.6	0.4	1.4	0.5	0.8	0.0	0.0	4.0	3.4	5.6	26.6	0.6
	Waitrose, Wood Street, Kingston	11.0	0.3	0.0	0.7	0.0	0.0	0.0	0.0	1.3	11.7	25.0	0.6
	Aldi, Adams Walk, Kingston	11.6	0.2	1.4	0.6	0.0	4.6	0.0	12.9	4.3	4.0	39.6	0.9
	M&S, Clarence Street, Kingston	6.9	0.8	0.3	1.1	0.0	3.4	1.0	0.0	0.0	7.7	21.3	0.5
	Tesco Express, Richmond Road, Kingston	3.0	0.0	0.0	0.4	0.0	0.0	0.7	0.0	0.0	0.0	4.1	0.1
	Other Local Stores, Kingston	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0
	Sub-Total	44.1	1.7	3.2	3.2	0.8	8.0	1.7	16.8	9.0	29.0	117.6	2.7
1	**Kingston Edge and Out-of-Centre**												
	Sainsbury's, Sury Basin, Kingston (Edge-of-Centre)	26.8	1.8	1.5	0.9	0.0	8.2	0.0	0.0	0.0	9.3	48.6	1.1
	Asda, London Road, Kingston (Out-of-Centre)	13.4	1.3	1.7	5.8	0.0	0.0	4.3	0.0	3.6	5.1	35.3	0.8
	Lidl, Gordon Road, Kingston (Edge-of-Centre)	12.0	0.6	2.6	7.1	0.0	0.0	0.0	0.0	0.0	0.0	22.3	0.5
	Sub-Total	52.3	3.7	5.9	13.8	0.0	8.2	4.3	0.0	3.6	14.4	106.2	2.4
2	**Surbiton District Centre**												
	Sainsbury's Superstore, Victoria Road, Surbiton	1.2	12.8	3.8	0.0	3.2	2.0	0.0	0.0	0.0	14.4	37.4	0.8
	Waitrose, Claremont Road, Surbiton	1.9	21.3	4.6	2.1	2.6	0.0	0.0	0.0	0.0	16.7	49.2	1.1
	M&S Simply Food, Victoria Road, Surbiton	0.0	1.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	7.7	9.5	0.2
	Local Shops, Surbiton District Centre	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0
	Sub-Total	3.2	35.6	9.0	2.1	5.8	2.0	0.0	0.0	0.0	38.8	96.3	2.2
3	**Tolworth District Centre**												
	M&S Simply Food, Tolworth Broadway, Tolworth	0.0	3.0	9.5	2.3	1.0	0.0	3.9	0.0	0.4	1.1	21.3	0.5
	Tesco Express (Esso), Tolworth Broadway, Tolworth	0.0	1.0	3.7	0.8	0.0	9.2	0.0	0.0	0.0	7.2	21.8	0.5
	Iceland, Tolworth Broadway, Tolworth	0.0	1.5	2.1	1.5	0.6	0.0	0.0	0.0	0.0	0.0	5.8	0.1
	Sainsbury's Local, Ewell Road, Tolworth	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0
	Local Shops, Tolworth District Centre	0.0	0.0	0.3	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.6	0.0
	Sub-Total	0.0	5.5	16.5	4.6	2.0	9.2	3.9	0.0	0.4	8.3	50.3	1.1
4	**New Malden District Centre**												
	Waitrose, High Street, New Malden	1.8	0.0	0.4	33.6	0.3	0.0	1.6	0.0	0.0	0.0	37.7	0.9
	Tesco Express, High Street, New Malden	0.0	0.1	0.0	6.5	0.0	0.0	0.0	0.0	0.0	0.0	6.6	0.2
	M&S, High Street, New Malden	0.0	0.0	0.2	1.6	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0
	Lidl, Blagdon Road, New Malden	0.2	0.0	1.9	11.0	0.0	0.0	8.6	0.0	0.0	0.0	21.7	0.5
	Local Shops, New Malden District Centre	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0
	Sub-Total	2.0	0.1	2.5	54.4	0.3	0.0	10.3	0.0	0.0	0.0	69.5	1.6
	Other Edge and Out-of-Centre, Borough-wide												
4	Aldi, Kingston Road, New Malden (Edge of Centre)	1.9	0.2	1.7	11.4	0.0	0.0	0.0	0.0	0.0	0.0	15.2	0.3
4	Sainsbury's Local, Coombe Road, Norbiton (Edge-of-Centre	1.1	1.5	0.0	1.3	0.0	0.0	11.8	0.0	0.0	2.6	18.2	0.4
5	Lidl, Leatherhead Road, Chessington (Out-of-Centre)	0.0	0.6	0.9	0.2	14.9	0.0	0.0	0.0	0.4	7.0	23.9	0.5
1	Co-Op, King's Road, Kingston (Out-of-Centre)	7.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.0	0.2
1	Waitrose Little, Shell Petrol Station, Richmond Road (Edge	4.3	0.0	0.0	0.1	0.0	9.2	0.0	0.0	0.0	0.0	13.6	0.3
	Sub-Total	14.3	2.3	2.6	13.0	14.9	9.2	11.8	0.0	0.4	9.5	77.8	1.8
	Local Centres												
10	Ace of Spades Local Centre (No.1) (Tesco Express)	0.0	0.6	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0
3	Alexandra Drive Local Centre (No.2) (*Edge of Centre*) (Sain	0.0	4.3	3.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.7	0.2
2	Berrylands Road Local Centre (No.3) (Londis)	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
5	Chessington North Parade Local Centre (No.6) (Sainsbury's	0.0	0.0	0.0	0.0	3.4	0.0	0.0	0.0	0.0	0.0	3.4	0.1
2	Ewell Road North Local Centre (No.9) (Sainsbury's Local)	0.0	4.0	0.7	0.0	1.1	0.0	0.0	0.0	3.3	8.4	17.5	0.4
3	Ewell Road South Local Centre (No.10) (Co-Op)	0.0	0.9	1.4	0.0	0.0	0.0	0.0	0.0	0.0	2.1	4.4	0.1
5	Hook Parade Local Centre (No.11) (Sainsbury's Local)	0.0	0.0	0.0	0.0	5.9	0.0	0.0	0.0	0.0	0.0	5.9	0.1
5	Hook Parade Local Centre (No.11) (Tesco Express)	0.0	0.0	0.1	0.0	5.1	0.0	0.0	0.0	0.0	0.0	5.2	0.1
1	Kingston Hill/Park Road Local Centre (No.12) (Waitrose Lit	0.1	0.0	0.0	0.0	0.0	4.6	0.0	0.0	0.0	0.0	4.7	0.1
4	Malden Manor Local Centre (No.17) (*Edge of Centre*) (Co-	0.0	0.0	1.1	2.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.1
7	Plough Green Local Centre (No.18) (Tesco Express)	0.1	0.0	0.0	0.7	0.0	0.0	4.4	0.0	0.0	0.0	5.1	0.1
1	The Triangle Local Centre (No.22) (Tesco Express)	0.9	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.1
2	Villiers Avenue Local Centre (No.24) (Co-Op)	0.7	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0
	Sub-Total	1.8	10.9	7.1	4.2	15.5	4.6	4.4	0.0	3.3	10.5	62.3	1.4
	Total Kingston upon Thames	**117.7**	**59.8**	**46.7**	**95.3**	**39.2**	**41.1**	**36.4**	**16.8**	**16.7**	**110.5**	**580.1**	**13.1**
	Destinations for Convenience Goods Outside Royal Borough of Kingston upon Thames												
4	Tesco Extra, Beverley Way, New Malden	3.2	5.3	7.2	14.6	6.3	6.8	18.7	0.0	6.9	8.9	77.9	1.8
6	Asda, Roehampton Vale, Roehampton	0.0	0.8	0.2	2.2	0.3	42.1	27.8	0.0	1.8	3.1	78.2	1.8
6	Sainsbury's Superstore, Lower Richmond Road, Richmond	4.4	0.0	0.0	0.0	0.0	59.1	0.0	0.0	0.0	0.0	63.6	1.4
7	Tesco Express (Esso), London Road, North Cheam	1.3	0.0	0.0	3.5	0.0	8.2	19.6	16.7	8.9	2.5	60.6	1.4
7	Sainsbury's Superstore, London Road, North Cheam	0.0	0.0	0.2	2.8	0.0	3.1	137.0	0.0	1.7	0.6	145.4	3.3
9	Aldi, Kingston Road, Ewell	0.0	0.2	1.2	0.4	1.5	0.0	7.7	0.0	9.4	5.7	26.2	0.6
9	Sainsbury's Superstore, Kiln Lane, Epsom	0.0	0.4	1.1	0.0	5.1	0.0	4.2	0.0	44.4	0.0	55.1	1.2
9	Tesco Superstore, Oxshott Road, Leatherhead	0.0	0.0	0.2	1.7	5.0	0.0	0.0	0.0	50.0	0.6	57.5	1.3
9	Sainsbury's Superstore, Bridgeway, Cobham	0.0	0.0	1.1	0.2	0.3	0.0	0.0	0.0	16.5	21.0	39.2	0.9
10	Tesco Extra, Barns Wallis Drive, Weybridge	0.0	0.0	1.0	0.0	0.7	0.0	0.0	4.5	3.4	10.3	20.0	0.5
10	Aldi, Bridge Street, Walton-on-Thames	0.0	0.0	0.8	0.0	0.0	0.0	0.0	2.6	0.0	22.8	26.2	0.6
	Sub-Total	8.9	6.7	13.0	25.3	19.2	119.4	215.1	23.8	143.0	75.5	649.8	14.7
	ALL DESTINATIONS [listed above]	**126.6**	**66.5**	**59.6**	**120.6**	**58.4**	**160.5**	**251.4**	**40.6**	**159.7**	**186.0**	**1,229.9**	**27.8**
	OTHER DESTINATIONS	**8.7**	**3.5**	**3.0**	**21.9**	**3.7**	**986.0**	**646.5**	**949.0**	**256.4**	**311.1**	**3,189.9**	**72.2**

Royal Borough of Kingston upon Thames
Retail and Leisure Needs Assessment 2024

Convenience Goods Retail Need Forecasts

Table 10 - Convenience Goods Floorspace 2024

	Total net floorspace (sq.m)	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2022 (£m)
Kingston Town Centre					
Sainsbury's Eden Walk, Kingston	1,234	90%	1,111	13,810	15.3
Waitrose, Wood Street, Kingston	2,639	90%	2,375	15,174	36.0
Aldi, Adams Walk, Kingston	808	90%	727	10,575	7.7
M&S, Clarence Street, Kingston	1,322	90%	1,190	12,462	14.8
Tesco Express, Richmond Road, Kingston	445	95%	423	14,602	6.2
Other Local Stores, Kingston	2,949	95%	2,802	5,500	15.4
Sub-Total	*9,397*	-	*8,627*	*11,067*	*95.5*
Kingston Edge and Out-of-Centre					
Sainsbury's, Sury Basin, Kingston (Edge-of-Centre)	3,808	80%	3,046	13,810	42.1
Asda, London Road, Kingston (Out-of-Centre)	1,932	80%	1,546	19,030	29.4
Lidl, Gordon Road, Kingston (Edge-of-Centre)	1,764	90%	1,588	5,500	8.7
Sub-Total	*7,504*	-	*6,180*	*12,981*	*80.2*
Surbiton District Centre					
Sainsbury's Superstore, Victoria Road, Surbiton	1,658	90%	1,492	13,810	20.6
Waitrose, Claremont Road, Surbiton	1,908	90%	1,717	15,174	26.1
M&S Simply Food, Victoria Road, Surbiton	240	90%	216	12,462	2.7
Local Shops, Surbiton District Centre	2,730	90%	2,457	5,500	13.5
Sub-Total	*6,536*	-	*5,882*	*10,688*	*62.9*
Tolworth District Centre					
M&S Simply Food, Tolworth Broadway, Tolworth	1,266	95%	1,203	12,462	15.0
Tesco Express (Esso), Tolworth Broadway, Tolworth	128	95%	122	14,602	1.8
Iceland, Tolworth Broadway, Tolworth	570	95%	542	8,202	4.4
Sainsbury's Local, Ewell Road, Tolworth	504	95%	479	13,810	6.6
Local Shops, Tolworth District Centre	2,060	95%	1,957	5,500	10.8
Sub-Total	*4,528*	-	*4,302*	*8,969*	*38.6*
New Malden District Centre					
Waitrose, High Street, New Malden	1,284	90%	1,156	15,174	17.5
Tesco Express, High Street, New Malden	344	95%	327	14,602	4.8
M&S, High Street, New Malden	744	95%	707	12,462	8.8
Lidl, Blagdon Road, New Malden	776	90%	698	8,868	6.2
Local Shops, New Malden District Centre	3,824	95%	3,633	5,500	20.0
Sub-Total	*6,972*	-	*6,520*	*8,786*	*57.3*
Other Edge and Out-of-Centre, Borough-wide					
Aldi, Kingston Road, New Malden (Edge of Centre)	1,486	90%	1,337	10,575	14.1
Sainsbury's Local, Coombe Road, Norbiton (Edge-of-Centre)	510	95%	485	13,810	6.7
Lidl, Leatherhead Road, Chessington (Out-of-Centre)	1,832	90%	1,649	8,868	14.6
Co-Op, King's Road, Kingston (Out-of-Centre)	224	95%	213	5,680	1.2
Waitrose Little, Shell Petrol Station, Richmond Road (Edge-of-Centre)	160	90%	144	15,174	2.2
Sub-Total	*4,212*	-	*3,828*	*10,150*	*38.8*

Table 11 - Global Convenience Goods Floorspace Need - Borough-wide

	2024	2029	2034	2041
Total Available Expenditure (Zone 1-10) (£m)	4,373.6	4,341.5	4,353.0	4,419.8
Market Share from Survey Area (Zone 1-10) (%)	12	12	12	12
Convenience goods spending in Study Area (£m)	510.9	508.8	510.4	517.8
Existing Retail Floorspace (sq m net)	35,339	35,339	35,339	35,339
Sales per sqm net (£)	14,458	10,722	10,884	11,115
Sales from Existing Floorspace (£m)	510.9	378.9	384.6	392.8
Sales from Committed Floorspace (£m)	-	0.0	0.0	0.0
Residual Spending to support new floorspace (£000)	0.0	129.9	125.8	125.1
Sales per sq m net in new shops (£)	15,000	15,226	15,456	15,689
Capacity for new floorspace (sqm net)	**0**	**8,532**	**8,138**	**7,971**

Sales density of 0.20% 2022; 0.3% 2031-41 (source: Experian Retail Planner 21 (February 2024))

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Appendix 2

Comparison Goods Need Assessment

Royal Borough of Kingston upon Thames
Retail and Leisure Needs Assessment 2024

Comparison Goods Retail Need Forecasts

Table 1: Survey Area Postcode Composition

Zone	Postcode Sectors
Zone 1	KT1 1/2/3; KT2 5/6
Zone 2	KT5 8; KT6 4/6
Zone 3	KT5 9; KT6 7
Zone 4	KT2 7; KT3 3/4/5/6
Zone 5	KT9 1; KT9 2
Zone 6	SW14 7/8; TW1 1/2/3/4; TW9 1/2/3/4; TW10 5/6/7; SW11 6; SW12 8/9; SW13 0/8/9; SW15 1/2/3/4/5/6; SW17 0/7/8/9; SW18 1/2/3/4/5; W3 8; W4 1/2/3/4/5
Zone 7	SW19 1/2/3/4/5/6/7/8; SW20 0/8/9; KT4 7/8; SM1 1/2/3/4; SM2 5/6/7; SM3 8/9; SM4 4/5/6; SM5 1/2/3
Zone 8	TW2 5/6/7; TW3 1/2/3/4; TW4 5/6/7; TW5 0/9; TW7 4/5/6/7; TW8 0/8/9; TW13 4/5/6/7; TW14 0/8/9; TW15 1/2/3; TW16 5/6/7; TW17 0/8/9
Zone 9	KT17 1/2/3/4; KT18 5/6/7; KT19 0/7/8/9; KT21 1/2; KT11 1/2/3; KT22 0/7/8/9; KT23 3/4
Zone 10	KT1 4; KT8 0/1/2/9; KT12 2/3; TW11 0/8/9; TW12 1/2/3; KT7 0; KT10 0/8/9; KT12 1/4/5; KT13 0/8/9; KT6 5

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Comparison Goods Retail Need Forecasts

Table 2: Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	TOTAL
2024	46,748	25,089	21,591	49,471	21,369	397,525	314,676	348,858	148,273	176,648	1,550,248
2029	47,474	25,173	21,929	50,090	21,723	400,480	316,711	350,453	148,866	177,138	1,560,037
2034	47,927	25,134	22,193	50,562	22,042	404,628	318,659	352,238	149,033	177,256	1,569,672
2041	48,655	25,156	22,531	51,228	22,333	412,326	322,911	355,881	149,660	178,784	1,589,465
Change 2024-2029	726	84	338	619	354	2,955	2,035	1,595	593	490	9,789
Change 2029-2034	453	-39	264	472	319	4,148	1,948	1,785	167	118	9,635
Change 2034-2041	728	22	338	666	291	7,698	4,252	3,643	627	1,528	19,793
TOTAL Change 2024 - 2041	***1,907***	***67***	***940***	***1,757***	***964***	***14,801***	***8,235***	***7,023***	***1,387***	***2,136***	***39,217***

Source: Experian

Comparison Goods Retail Need Forecasts

Table 3: Survey Area per Capita Expenditure Forecasts - Comparison Goods

	Expenditure per Capita (£)	SFT (%)	SFT (£)	Expenditure per capita less SFT
2024	4,012	24.3%	975	3,037
2029	4,655	27.4%	1,276	3,380
2034	5,360	28.8%	1,544	3,817
2041	6,504	29.7%	1,932	4,572

Expenditure growth rates: 2024: -1.2%; 2025: 2.7%; 2026-30: 3.1%; 2031-41: 2.8%

Source: Experian E-Marketer. Expenditure growth rates and allowance for SFT are sourced from Experian Retail Planner 21 (February 2024)

Comparison Goods Retail Need Forecasts

Table 4 - Survey Area Comparison Goods Expenditure

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2024	142.0	76.2	65.6	150.2	64.9	1,207.3	955.7	1,059.5	450.3	536.5	**4,708.2**
2029	160.5	85.1	74.1	169.3	73.4	1,353.6	1,070.4	1,184.5	503.2	598.7	**5,272.8**
2034	182.9	95.9	84.7	193.0	84.1	1,544.3	1,216.2	1,344.4	568.8	676.5	**5,990.8**
2041	222.4	115.0	103.0	234.2	102.1	1,885.1	1,476.3	1,627.1	684.2	817.4	**7,267.0**
Change 2024-41 (£m)	**80.5**	**38.8**	**37.4**	**84.0**	**37.2**	**677.8**	**520.6**	**567.6**	**233.9**	**280.9**	**2,558.8**
Change 2024-2041 (%)	**56.7**	**50.9**	**57.1**	**55.9**	**57.3**	**56.1**	**54.5**	**53.6**	**51.9**	**52.4**	**54.3**

Source: Tables 2 and 3

Royal Borough of Kingston upon Thames
Retail and Leisure Needs Assessment 2024

Comparison Goods Retail Need Forecasts

Table 5 - Comparison Goods Allocation - % Market Share (2024)

Survey Location Zone		Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %
	Town Centre Destinations for Comparison Goods in Royal Borough of Kingston Upon Thame										
1	Kingston Metropolitan Centre	70.9%	57.5%	42.3%	56.7%	46.2%	15.1%	16.2%	8.6%	19.7%	44.3%
2	Surbiton District Centre	0.2%	14.5%	7.4%	0.1%	1.4%	0.0%	0.0%	0.0%	0.1%	1.4%
3	Tolworth District Centre	0.5%	1.4%	4.1%	0.2%	1.5%	0.0%	0.0%	0.0%	0.0%	0.4%
4	New Malden District Centre	0.3%	0.0%	2.2%	9.5%	2.5%	0.0%	0.2%	0.0%	0.1%	0.3%
	Total	*71.8%*	*73.3%*	*56.0%*	*66.4%*	*51.5%*	*15.1%*	*16.4%*	*8.6%*	*20.0%*	*46.5%*
	Edge and Out-of-Centre Destinations for Comparison Goods in Royal Borough of Kingston Upon Thames										
4	Retail Warehousing, Kingston Road	0.3%	0.2%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total	*0.3%*	*0.2%*	*0.0%*	*0.2%*	*0.1%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*
	Total Royal Borough of Kingston upon Thames	***72.1%***	***73.5%***	***56.0%***	***66.7%***	***51.6%***	***15.1%***	***16.4%***	***8.6%***	***20.0%***	***46.5%***
	Destinations for Comparison Goods Outside Royal Borough of Kingston Upon Thames										
4	Retail Warehousing New Malden	8.5%	13.4%	18.1%	20.4%	20.0%	2.4%	8.4%	0.0%	5.0%	4.2%
4	Kew Retail Park, Bessant Drive	1.6%	0.0%	0.0%	0.0%	0.0%	2.5%	0.5%	4.0%	0.0%	0.9%
6	Putney Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.9%	0.0%	0.7%	0.0%
6	Richmond Town Centre	0.7%	0.4%	3.6%	0.4%	0.0%	9.8%	0.1%	4.2%	0.0%	8.0%
6	Tooting Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
6	Twickenham Town Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	3.0%	0.0%	0.1%
6	Wandsworth Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.4%	0.1%	0.0%	0.0%
6	Morden Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
7	Sutton Town Centre	0.0%	0.0%	0.1%	0.3%	0.0%	0.0%	11.8%	0.0%	0.2%	0.0%
7	Wimbledon Town Centre	0.0%	0.1%	0.2%	5.5%	0.2%	0.4%	2.8%	0.0%	0.0%	0.1%
7	Priory Retail Park, Colliers Wood	0.5%	0.0%	0.0%	0.6%	0.0%	2.4%	2.6%	0.8%	0.0%	0.0%
7	Feltham Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	2.1%	0.0%	0.0%
8	Hounslow Town Centre	0.5%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	18.8%	0.0%	0.0%
8	Isleworth Town Centre	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
8	Apex Retail Park, Twickenham	0.0%	0.1%	0.0%	0.0%	0.0%	4.3%	0.1%	3.5%	0.0%	2.1%
8	Epsom Town Centre	0.3%	0.1%	0.6%	0.6%	4.8%	0.0%	1.0%	0.0%	15.5%	0.0%
9	Leatherhead Town Centre	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.1%	0.0%	6.7%	0.0%
9	B&Q, Kingston Road, Leatherhead	0.6%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	4.0%	0.5%
9	Homebase, Reigate Road, Ewell	0.0%	0.2%	0.4%	0.0%	0.5%	0.0%	0.4%	0.0%	0.6%	0.0%
9	Walton on Thames Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	4.8%
10	Weybridge Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
10	Guildford Town Centre	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	12.3%	1.5%
Outside	Staines upon Thames Town Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	6.2%	0.0%	2.0%
Outside	Westfield Shepherds Bush	0.3%	0.0%	0.0%	0.0%	0.0%	6.5%	0.2%	0.9%	0.0%	0.1%
Outside	Central London / West End	0.9%	4.4%	1.8%	3.2%	0.0%	3.5%	5.3%	2.2%	2.4%	1.4%
Outside	Homebase, The Causeway, Staines	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%
Outside	Ikea, Hammersmith	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%
Outside	Ikea, Wembley	1.3%	0.0%	0.4%	0.0%	0.0%	1.5%	0.0%	2.6%	0.0%	0.0%
Outside	Ikea, Croydon	0.4%	1.0%	2.3%	1.0%	1.5%	0.9%	3.4%	0.3%	0.6%	2.3%
	Total Outside Borough	***16.9%***	***20.0%***	***27.7%***	***32.0%***	***28.3%***	***47.3%***	***38.6%***	***49.9%***	***48.1%***	***29.2%***
	Total All Destinations	***89.0%***	***93.5%***	***83.7%***	***98.7%***	***79.9%***	***62.4%***	***55.0%***	***58.4%***	***68.1%***	***75.7%***
	Other Destinations (Inside and Outside Borough)	***11.0%***	***6.5%***	***16.3%***	***1.3%***	***20.1%***	***37.6%***	***45.0%***	***41.6%***	***31.9%***	***24.3%***

Royal Borough of Kingston upon Thames
Retail and Leisure Needs Assessment 2024

Comparison Goods Retail Need Forecasts

Table 6 - Comparison Goods Allocation - Spend (£) 2024

Survey Location Zone		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Total £m	Total %
	Total Available Comparison Goods Spend - 2024	*142.0*	*76.2*	*65.6*	*150.2*	*64.9*	*1,207.3*	*955.7*	*1,059.5*	*450.3*	*536.5*	*4,708.2*	*100.0*
	Town Centre Destinations for Comparison Goods in Royal Borough of Kingston Upon												
1	Kingston Metropolitan Centre	100.6	43.8	27.7	85.1	30.0	182.2	154.7	90.6	88.9	237.4	1,041.1	22.1
2	Surbiton District Centre	0.3	11.0	4.9	0.1	0.9	0.0	0.0	0.0	0.5	7.8	25.5	0.5
3	Tolworth District Centre	0.7	1.0	2.7	0.2	0.9	0.0	0.0	0.0	0.0	2.4	8.0	0.2
4	New Malden District Centre	0.4	0.0	1.4	14.3	1.7	0.0	2.0	0.0	0.5	1.8	22.2	0.5
	Total	102.0	55.8	36.7	99.8	33.4	182.2	156.8	90.6	89.9	249.4	1,096.8	23.3
	Edge and Out-of-Centre Destinations for Comparison Goods in Royal Borough of Kingston Upon Thames												
4	Retail Warehousing, Kingston Road	0.4	0.2	0.0	0.4	0.1	0.0	0.0	0.0	0.0	0.0	1.0	0.0
	Total	0.4	0.2	0.0	0.4	0.1	0.0	0.0	0.0	0.0	0.0	1.0	0.0
	Total Royal Borough of Kingston upon Thames	**102.4**	**56.0**	**36.7**	**100.2**	**33.5**	**182.2**	**156.8**	**90.6**	**89.9**	**249.4**	**1,097.8**	**23.3**
	Destinations for Comparison Goods outside Royal Borough of Kingston upon Thames												
4	Retail Warehousing New Malden	12.0	10.2	11.9	30.7	13.0	29.5	80.3	0.0	22.5	22.5	232.6	4.9
6	Kew Retail Park, Bessant Drive	2.2	0.0	0.0	0.0	0.0	30.3	5.0	42.7	0.0	4.8	85.1	1.8
6	Putney Town Centre	0.0	0.0	0.0	0.0	0.0	48.6	8.5	0.0	3.2	0.0	60.3	1.3
6	Richmond Town Centre	1.0	0.3	2.3	0.5	0.0	118.3	0.5	44.0	0.0	42.8	209.8	4.5
6	Tooting Town Centre	0.0	0.0	0.0	0.0	0.0	12.3	0.0	0.0	0.0	0.0	12.3	0.3
6	Twickenham Town Centre	0.1	0.0	0.0	0.0	0.0	1.7	0.0	31.8	0.0	0.4	34.0	0.7
6	Wandsworth Town Centre	0.0	0.0	0.0	0.0	0.0	30.6	3.5	1.4	0.0	0.0	35.5	0.8
7	Morden Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	6.6	0.0	0.0	0.0	6.6	0.1
7	Sutton Town Centre	0.0	0.0	0.1	0.5	0.0	0.0	112.7	0.0	1.0	0.0	114.3	2.4
7	Wimbledon Town Centre	0.0	0.1	0.1	8.3	0.1	5.4	26.8	0.0	0.0	0.3	41.1	0.9
7	Priory Retail Park, Colliers Wood	0.7	0.0	0.0	1.0	0.0	28.7	25.0	8.5	0.0	0.2	64.1	1.4
8	Feltham Town Centre	0.0	0.0	0.0	0.0	0.0	10.1	0.0	21.8	0.0	0.0	31.9	0.7
8	Hounslow Town Centre	0.8	0.0	0.0	0.0	0.0	22.5	0.0	199.4	0.0	0.0	222.7	4.7
8	Isleworth Town Centre	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	2.0	0.0
8	Apex Retail Park, Twickenham	0.0	0.1	0.0	0.0	0.0	52.4	1.3	37.6	0.0	11.5	102.9	2.2
9	Epsom Town Centre	0.4	0.1	0.4	0.8	3.1	0.0	9.4	0.0	69.8	0.0	84.1	1.8
9	Leatherhead Town Centre	0.0	0.0	0.0	0.0	0.2	0.0	1.1	0.0	30.2	0.0	31.6	0.7
9	B&Q, Kingston Road, Leatherhead	0.8	0.0	0.0	0.0	0.6	0.0	0.0	0.0	18.1	2.7	22.2	0.5
9	Homebase, Reigate Road, Ewell	0.0	0.2	0.3	0.0	0.3	0.0	3.6	0.0	2.8	0.0	7.2	0.2
10	Walton on Thames Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	0.0	26.0	29.8	0.6
10	Weybridge Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	6.9	7.4	0.2
Outside	Guildford Town Centre	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	55.5	8.0	63.7	1.4
Outside	Staines upon Thames Town Centre	0.1	0.0	0.0	0.0	0.0	2.8	0.0	65.7	0.0	10.6	79.2	1.7
Outside	Westfield Shepherds Bush	0.4	0.0	0.0	0.0	0.0	78.6	2.0	9.9	0.0	0.3	91.2	1.9
Outside	Central London / West End	1.2	3.4	1.2	4.8	0.0	42.4	50.4	23.6	11.0	7.4	145.3	3.1
Outside	Homebase, The Causeway, Staines	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.6	0.0	0.0	5.6	0.1
Outside	Ikea, Hammersmith	0.0	0.0	0.0	0.0	0.0	27.2	0.0	0.0	0.0	0.0	27.2	0.6
Outside	Ikea, Wembley	1.9	0.0	0.2	0.0	0.0	18.5	0.0	28.0	0.0	0.0	48.6	1.0
Outside	Ikea, Croydon	0.6	0.7	1.5	1.5	1.0	11.3	32.1	3.6	2.7	12.5	67.6	1.4
	Total Outside Borough (£m)	**24.0**	**15.2**	**18.2**	**48.1**	**18.4**	**571.2**	**368.9**	**528.3**	**216.6**	**156.9**	**1,965.8**	**41.8**
	Total All Destinations (above) (£m)	**126.4**	**71.2**	**54.9**	**148.3**	**51.9**	**753.5**	**525.7**	**618.9**	**306.6**	**406.3**	**3,063.6**	**65.1**
	Other Destinations (£m)	**15.6**	**5.0**	**10.7**	**1.9**	**13.0**	**453.9**	**430.0**	**440.6**	**143.7**	**130.2**	**1,644.6**	**34.9**

Royal Borough of Kingston upon Thames
Retail and Leisure Needs Assessment 2024

Comparison Goods Retail Need Forecasts

Table 7 - Comparison Goods Allocation - Spend (£) 2029

Survey Location Zone		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Total £m	Total %
	Total Available Comparison Goods Spend - 2029	*160.5*	*85.1*	*74.1*	*169.3*	*73.4*	*1,353.6*	*1,070.4*	*1,184.5*	*503.2*	*598.7*	*5,272.8*	*100.0*
	Town Centre Destinations for Comparison Goods in Royal Borough of Kingston Upon Th												
1	Kingston Metropolitan Centre	113.7	48.9	31.3	95.9	33.9	204.3	173.3	101.3	99.4	264.9	1,167.0	22.1
2	Surbiton District Centre	0.4	12.3	5.5	0.1	1.0	0.0	0.0	0.0	0.6	8.7	28.5	0.5
3	Tolworth District Centre	0.8	1.2	3.1	0.3	1.1	0.0	0.0	0.0	0.0	2.7	9.0	0.2
4	New Malden District Centre	0.5	0.0	1.6	16.2	1.9	0.0	2.3	0.0	0.6	2.0	25.0	0.5
	Total	115.3	62.4	41.5	112.5	37.8	204.3	175.6	101.3	100.5	278.3	1,229.5	23.3
	Edge and Out-of-Centre Destinations for Comparison Goods in Royal Borough of Kingston Upon Thames												
4	Retail Warehousing, Kingston Road	0.4	0.2	0.0	0.4	0.1	0.0	0.0	0.0	0.0	0.0	1.1	0.0
	Total	0.4	0.2	0.0	0.4	0.1	0.0	0.0	0.0	0.0	0.0	1.1	0.0
	Total Royal Borough of Kingston upon Thames	**115.7**	**62.6**	**41.5**	**112.9**	**37.9**	**204.3**	**175.6**	**101.3**	**100.5**	**278.3**	**1,230.6**	**23.3**
	Destinations for Comparison Goods outside Royal Borough of Kingston upon Thames												
4	Retail Warehousing New Malden	13.6	11.4	13.4	34.6	14.7	33.1	89.9	0.0	25.2	25.1	261.0	4.9
6	Kew Retail Park, Bessant Drive	2.5	0.0	0.0	0.0	0.0	33.9	5.6	47.8	0.0	5.4	95.2	1.8
6	Putney Town Centre	0.0	0.0	0.0	0.0	0.0	54.5	9.5	0.0	3.6	0.0	67.6	1.3
6	Richmond Town Centre	1.1	0.4	2.7	0.6	0.0	132.7	0.6	49.2	0.0	47.7	234.9	4.5
6	Tooting Town Centre	0.0	0.0	0.0	0.0	0.0	13.7	0.0	0.0	0.0	0.0	13.7	0.3
6	Twickenham Town Centre	0.2	0.0	0.0	0.0	0.0	2.0	0.0	35.5	0.0	0.4	38.0	0.7
6	Wandsworth Town Centre	0.0	0.0	0.0	0.0	0.0	34.3	3.9	1.5	0.0	0.0	39.8	0.8
7	Morden Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	7.4	0.0	0.0	0.0	7.4	0.1
7	Sutton Town Centre	0.0	0.0	0.1	0.5	0.0	0.0	126.3	0.0	1.1	0.0	128.0	2.4
7	Wimbledon Town Centre	0.0	0.1	0.1	9.4	0.1	6.1	30.0	0.0	0.0	0.3	46.1	0.9
7	Priory Retail Park, Colliers Wood	0.7	0.0	0.0	1.1	0.0	32.2	28.0	9.5	0.0	0.2	71.8	1.4
8	Feltham Town Centre	0.0	0.0	0.0	0.0	0.0	11.3	0.0	24.4	0.0	0.0	35.7	0.7
8	Hounslow Town Centre	0.9	0.0	0.0	0.0	0.0	25.2	0.0	223.0	0.0	0.0	249.0	4.7
8	Isleworth Town Centre	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	2.3	0.0
8	Apex Retail Park, Twickenham	0.0	0.1	0.0	0.0	0.0	58.8	1.5	42.0	0.0	12.8	115.2	2.2
9	Epsom Town Centre	0.5	0.1	0.5	1.0	3.5	0.0	10.5	0.0	78.0	0.0	94.0	1.8
9	Leatherhead Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	1.2	0.0	33.8	0.0	35.3	0.7
9	B&Q, Kingston Road, Leatherhead	1.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	20.2	3.0	24.9	0.5
9	Homebase, Reigate Road, Ewell	0.0	0.2	0.3	0.0	0.4	0.0	4.0	0.0	3.1	0.0	8.0	0.2
10	Walton on Thames Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.0	29.0	33.2	0.6
10	Weybridge Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	7.7	8.2	0.2
Outside	Guildford Town Centre	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	62.0	8.9	71.2	1.3
Outside	Staines upon Thames Town Centre	0.2	0.0	0.0	0.0	0.0	3.1	0.0	73.4	0.0	11.9	88.5	1.7
Outside	Westfield Shepherds Bush	0.4	0.0	0.0	0.0	0.0	88.2	2.3	11.1	0.0	0.3	102.3	1.9
Outside	Central London / West End	1.4	3.8	1.4	5.4	0.0	47.5	56.4	26.4	12.2	8.3	162.7	3.1
Outside	Homebase, The Causeway, Staines	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3	0.0	0.0	6.3	0.1
Outside	Ikea, Hammersmith	0.0	0.0	0.0	0.0	0.0	30.5	0.0	0.0	0.0	0.0	30.5	0.6
Outside	Ikea, Wembley	2.1	0.0	0.3	0.0	0.0	20.7	0.0	31.3	0.0	0.0	54.4	1.0
Outside	Ikea, Croydon	0.7	0.8	1.7	1.7	1.1	12.7	35.9	4.0	3.0	14.0	75.7	1.4
	Total Outside Borough (£m)	**27.2**	**17.0**	**20.5**	**54.2**	**20.8**	**640.4**	**413.2**	**590.6**	**242.1**	**175.0**	**2,201.0**	**41.7**
	Total All Destinations (above) (£m)	**27.2**	**17.0**	**20.5**	**54.2**	**20.8**	**640.4**	**413.2**	**590.6**	**242.1**	**175.0**	**2,201.0**	**41.7**
	Other Destinations (£m)	**133.3**	**68.1**	**53.6**	**115.1**	**52.6**	**713.1**	**657.2**	**593.9**	**261.1**	**423.7**	**3,071.7**	**58.3**

Royal Borough of Kingston upon Thames
Retail and Leisure Needs Assessment 2024

Comparison Goods Retail Need Forecasts

Table 8 - Comparison Goods Allocation - Spend (£) 2034

Survey Location Zone		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Total £m	Total %
	Total Available Comparison Goods Spend - 2034	***182.9***	***95.9***	***84.7***	***193.0***	***84.1***	***1,544.3***	***1,216.2***	***1,344.4***	***568.8***	***676.5***	***5,990.8***	***100.0***
	Town Centre Destinations for Comparison Goods in Royal Borough of Kingston Upon Tha												
1	Kingston Metropolitan Centre	129.6	55.1	35.8	109.4	38.8	233.1	196.9	115.0	112.3	299.4	1,325.4	22.1
2	Surbiton District Centre	0.4	13.9	6.3	0.1	1.1	0.0	0.0	0.0	0.6	9.8	32.3	0.5
3	Tolworth District Centre	0.9	1.3	3.5	0.3	1.2	0.0	0.0	0.0	0.0	3.0	10.2	0.2
4	New Malden District Centre	0.5	0.0	1.8	18.4	2.1	0.0	2.6	0.0	0.6	2.3	28.5	0.5
	Total	131.4	70.3	47.4	128.2	43.3	233.1	199.5	115.0	113.6	314.5	1,396.4	23.3
	Edge and Out-of-Centre Destinations for Comparison Goods in Royal Borough of Kingston Upon Thames												
4	Retail Warehousing, Kingston Road	0.5	0.2	0.0	0.5	0.1	0.0	0.0	0.0	0.0	0.0	1.3	0.0
	Total	0.5	0.2	0.0	0.5	0.1	0.0	0.0	0.0	0.0	0.0	1.3	0.0
	Total Royal Borough of Kingston upon Thames	**131.9**	**70.5**	**47.4**	**128.7**	**43.4**	**233.1**	**199.5**	**115.0**	**113.6**	**314.5**	**1,397.6**	**23.3**
	Destinations for Comparison Goods outside Royal Borough of Kingston upon Thames												
4	Retail Warehousing New Malden	15.5	12.8	15.3	39.4	16.8	37.8	102.1	0.0	28.5	28.4	296.7	5.0
6	Kew Retail Park, Bessant Drive	2.9	0.0	0.0	0.0	0.0	38.7	6.3	54.2	0.0	6.1	108.3	1.8
6	Putney Town Centre	0.0	0.0	0.0	0.0	0.0	62.2	10.8	0.0	4.0	0.0	77.1	1.3
6	Richmond Town Centre	1.3	0.4	3.0	0.7	0.0	151.3	0.7	55.9	0.0	53.9	267.2	4.5
6	Tooting Town Centre	0.0	0.0	0.0	0.0	0.0	15.7	0.0	0.0	0.0	0.0	15.7	0.3
6	Twickenham Town Centre	0.2	0.0	0.0	0.0	0.0	2.2	0.0	40.3	0.0	0.4	43.2	0.7
6	Wandsworth Town Centre	0.0	0.0	0.0	0.0	0.0	39.1	4.5	1.8	0.0	0.0	45.3	0.8
7	Morden Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	8.4	0.0	0.0	0.0	8.4	0.1
7	Sutton Town Centre	0.0	0.0	0.1	0.6	0.0	0.0	143.5	0.0	1.3	0.0	145.4	2.4
7	Wimbledon Town Centre	0.0	0.1	0.1	10.7	0.1	6.9	34.1	0.0	0.0	0.4	52.5	0.9
7	Priory Retail Park, Colliers Wood	0.9	0.0	0.0	1.2	0.0	36.7	31.9	10.8	0.0	0.2	81.7	1.4
8	Feltham Town Centre	0.0	0.0	0.0	0.0	0.0	12.9	0.0	27.7	0.0	0.0	40.6	0.7
8	Hounslow Town Centre	1.0	0.0	0.0	0.0	0.0	28.7	0.0	253.0	0.0	0.0	282.8	4.7
8	Isleworth Town Centre	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	2.6	0.0
8	Apex Retail Park, Twickenham	0.0	0.1	0.0	0.0	0.0	67.1	1.7	47.7	0.0	14.5	131.0	2.2
9	Epsom Town Centre	0.6	0.1	0.5	1.1	4.0	0.0	12.0	0.0	88.1	0.0	106.4	1.8
9	Leatherhead Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	1.4	0.0	38.2	0.0	39.9	0.7
9	B&Q, Kingston Road, Leatherhead	1.1	0.0	0.0	0.0	0.8	0.0	0.0	0.0	22.8	3.4	28.1	0.5
9	Homebase, Reigate Road, Ewell	0.0	0.2	0.4	0.0	0.4	0.0	4.6	0.0	3.5	0.0	9.1	0.2
10	Walton on Thames Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	0.0	32.8	37.6	0.6
10	Weybridge Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	8.8	9.3	0.2
Outside	Guildford Town Centre	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	70.1	10.0	80.4	1.3
Outside	Staines upon Thames Town Centre	0.2	0.0	0.0	0.0	0.0	3.5	0.0	83.3	0.0	13.4	100.5	1.7
Outside	Westfield Shepherds Bush	0.5	0.0	0.0	0.0	0.0	100.6	2.6	12.6	0.0	0.4	116.6	1.9
Outside	Central London / West End	1.6	4.3	1.6	6.2	0.0	54.2	64.1	29.9	13.8	9.3	184.9	3.1
Outside	Homebase, The Causeway, Staines	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.1	0.0	0.0	7.1	0.1
Outside	Ikea, Hammersmith	0.0	0.0	0.0	0.0	0.0	34.8	0.0	0.0	0.0	0.0	34.8	0.6
Outside	Ikea, Wembley	2.4	0.0	0.3	0.0	0.0	23.6	0.0	35.5	0.0	0.0	61.9	1.0
Outside	Ikea, Croydon	0.8	0.9	2.0	2.0	1.3	14.5	40.8	4.6	3.4	15.8	86.0	1.4
	Total Outside Borough (£m)	**31.0**	**19.1**	**23.5**	**61.8**	**23.8**	**730.7**	**469.5**	**670.3**	**273.7**	**197.8**	**2,501.1**	**41.7**
	Total All Destinations (above) (£m)	**31.0**	**19.1**	**23.5**	**61.8**	**23.8**	**730.7**	**469.5**	**670.3**	**273.7**	**197.8**	**2,501.1**	**41.7**
	Other Destinations (£m)	**152.0**	**76.8**	**61.2**	**131.2**	**60.3**	**813.6**	**746.7**	**674.1**	**295.1**	**478.7**	**3,489.7**	**58.3**

Royal Borough of Kingston upon Thames
Retail and Leisure Needs Assessment 2024

Comparison Goods Retail Need Forecasts

Table 9 - Comparison Goods Allocation - Spend (£) 2041

Survey Location Zone		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Total £m	Total %
	Total Available Comparison Goods Spend - 2041	***222.4***	***115.0***	***103.0***	***234.2***	***102.1***	***1,885.1***	***1,476.3***	***1,627.1***	***684.2***	***817.4***	***7,267.0***	***100.0***
	Town Centre Destinations for Comparison Goods in Royal Borough of Kingston Upon Th												
1	Kingston Metropolitan Centre	157.6	66.1	43.5	132.7	47.1	284.5	239.0	139.2	135.1	361.7	1,606.7	22.1
2	Surbiton District Centre	0.5	16.6	7.7	0.2	1.4	0.0	0.0	0.0	0.8	11.8	38.9	0.5
3	Tolworth District Centre	1.1	1.6	4.2	0.4	1.5	0.0	0.0	0.0	0.0	3.6	12.4	0.2
4	New Malden District Centre	0.6	0.0	2.2	22.3	2.6	0.0	3.2	0.0	0.8	2.8	34.5	0.5
	Total	159.8	84.3	57.6	155.6	52.6	284.5	242.2	139.2	136.7	380.0	1,692.5	23.3
	Edge and Out-of-Centre Destinations for Comparison Goods in Royal Borough of Kingston Upon Thames												
4	Retail Warehousing, Kingston Road	0.6	0.3	0.0	0.6	0.1	0.0	0.0	0.0	0.0	0.0	1.5	0.0
	Total	0.6	0.3	0.0	0.6	0.1	0.0	0.0	0.0	0.0	0.0	1.5	0.0
	Total Royal Borough of Kingston upon Thames	**160.4**	**84.6**	**57.6**	**156.2**	**52.7**	**284.5**	**242.2**	**139.2**	**136.7**	**380.0**	**1,694.1**	**23.3**
	Destinations for Comparison Goods outside Royal Borough of Kingston upon Thames												
4	Retail Warehousing New Malden	18.9	15.4	18.7	47.8	20.4	46.1	124.0	0.0	34.2	34.3	359.8	5.0
6	Kew Retail Park, Bessant Drive	3.5	0.0	0.0	0.0	0.0	47.3	7.7	65.6	0.0	7.3	131.4	1.8
6	Putney Town Centre	0.0	0.0	0.0	0.0	0.0	76.0	13.1	0.0	4.9	0.0	93.9	1.3
6	Richmond Town Centre	1.5	0.5	3.7	0.8	0.0	184.7	0.8	67.6	0.0	65.2	324.9	4.5
6	Tooting Town Centre	0.0	0.0	0.0	0.0	0.0	19.1	0.0	0.0	0.0	0.0	19.1	0.3
6	Twickenham Town Centre	0.2	0.0	0.0	0.0	0.0	2.7	0.0	48.8	0.0	0.5	52.3	0.7
6	Wandsworth Town Centre	0.0	0.0	0.0	0.0	0.0	47.7	5.4	2.1	0.0	0.0	55.3	0.8
7	Morden Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	10.2	0.0	0.0	0.0	10.2	0.1
7	Sutton Town Centre	0.0	0.0	0.1	0.7	0.0	0.0	174.2	0.0	1.5	0.0	176.5	2.4
7	Wimbledon Town Centre	0.0	0.1	0.2	13.0	0.2	8.5	41.4	0.0	0.0	0.4	63.7	0.9
7	Priory Retail Park, Colliers Wood	1.0	0.0	0.0	1.5	0.0	44.8	38.7	13.1	0.0	0.2	99.4	1.4
8	Feltham Town Centre	0.0	0.0	0.0	0.0	0.0	15.8	0.0	33.5	0.0	0.0	49.3	0.7
8	Hounslow Town Centre	1.2	0.0	0.0	0.0	0.0	35.1	0.0	306.3	0.0	0.0	342.6	4.7
8	Isleworth Town Centre	2.7	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	3.2	0.0
8	Apex Retail Park, Twickenham	0.0	0.1	0.0	0.0	0.0	81.9	2.1	57.7	0.0	17.5	159.3	2.2
9	Epsom Town Centre	0.7	0.1	0.6	1.3	4.9	0.0	14.5	0.0	106.0	0.0	128.2	1.8
9	Leatherhead Town Centre	0.0	0.0	0.0	0.0	0.4	0.0	1.7	0.0	45.9	0.0	48.0	0.7
9	B&Q, Kingston Road, Leatherhead	1.3	0.0	0.0	0.0	0.9	0.0	0.0	0.0	27.4	4.1	33.9	0.5
9	Homebase, Reigate Road, Ewell	0.0	0.3	0.4	0.0	0.5	0.0	5.5	0.0	4.2	0.0	11.0	0.2
10	Walton on Thames Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.8	0.0	39.6	45.4	0.6
10	Weybridge Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	10.6	11.3	0.2
Outside	Guildford Town Centre	0.0	0.3	0.1	0.0	0.0	0.0	0.0	0.0	84.3	12.1	96.8	1.3
Outside	Staines upon Thames Town Centre	0.2	0.0	0.0	0.0	0.0	4.3	0.0	100.9	0.0	16.2	121.6	1.7
Outside	Westfield Shepherds Bush	0.6	0.0	0.0	0.0	0.0	122.8	3.2	15.2	0.0	0.4	142.2	2.0
Outside	Central London / West End	1.9	5.1	1.9	7.5	0.0	66.1	77.8	36.2	16.7	11.3	224.5	3.1
Outside	Homebase, The Causeway, Staines	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.6	0.0	0.0	8.6	0.1
Outside	Ikea, Hammersmith	0.0	0.0	0.0	0.0	0.0	42.5	0.0	0.0	0.0	0.0	42.5	0.6
Outside	Ikea, Wembley	2.9	0.0	0.4	0.0	0.0	28.8	0.0	43.0	0.0	0.0	75.1	1.0
Outside	Ikea, Croydon	1.0	1.1	2.4	2.4	1.6	17.7	49.5	5.5	4.1	19.1	104.4	1.4
	Total Outside Borough (£m)	**37.6**	**23.0**	**28.5**	**75.0**	**28.9**	**892.0**	**569.9**	**811.3**	**329.2**	**239.0**	**3,034.3**	**41.8**
	Total All Destinations (above) (£m)	**37.6**	**23.0**	**28.5**	**75.0**	**28.9**	**892.0**	**569.9**	**811.3**	**329.2**	**239.0**	**3,034.3**	**41.8**
	Other Destinations (£m)	**184.8**	**92.1**	**74.5**	**159.2**	**73.2**	**993.2**	**906.4**	**815.8**	**355.1**	**578.4**	**4,232.7**	**58.2**

Comparison Goods Retail Need Forecasts

Table 10 - Existing Comparison Goods Floorspace 2024

Survey Zone	Town Centre	Gross Floorspace (sq m)	Net Floorspace (sq m net)
8	Kingston Metropolitan Centre	86,930	69,544
5	Surbiton District Centre	6,330	5,064
2	Tolworth District Centre	5,020	4,016
3/9	New Malden District Centre	6,880	5,504
	TOTAL FLOORSPACE		**84,128**

Comparison Goods Retail Need Forecasts

Table 11 - Global Comparison Goods Floorspace Need - Borough-wide

	2024	2029	2034	2041
Total Available Expenditure (Zone 1-10) (£m)	4,708.2	5,272.8	5,990.8	7,267.0
Market Share from Survey Area (Zone 1-10) (%)	23.3	23.3	23.3	23.3
Survey Area Residents Spending (a) (£m)	1,097.8	1,230.6	1,397.6	1,694.1
Inflow from Beyond Survey Area (£m) (Note a)	218.5	244.9	278.1	337.1
Comparison goods spending in Study Area (£m)	1,316.2	1,475.4	1,675.7	2,031.1
Existing Retail Floorspace (sq m net)	84,128	84,128	84,128	84,128
Sales per sqm net (£)	15,646	17,252	19,806	22,739
Sales from Existing Floorspace (£m)	1,316.2	1,451.4	1,666.3	1,913.0
Residual Spending to support new floorspace (£000)	0.0	24.1	9.5	118.1
Sales per sq m net in new shops (£)	10,000	11,335	13,014	14,941
Capacity for new floorspace (sqm net)	**0**	**2,124**	**727**	**7,907**

Note a) 17% Kingston inflow and 17% Surbiton inflow; derived from combined household telephone survey and in-centre shopper survey

urban shape
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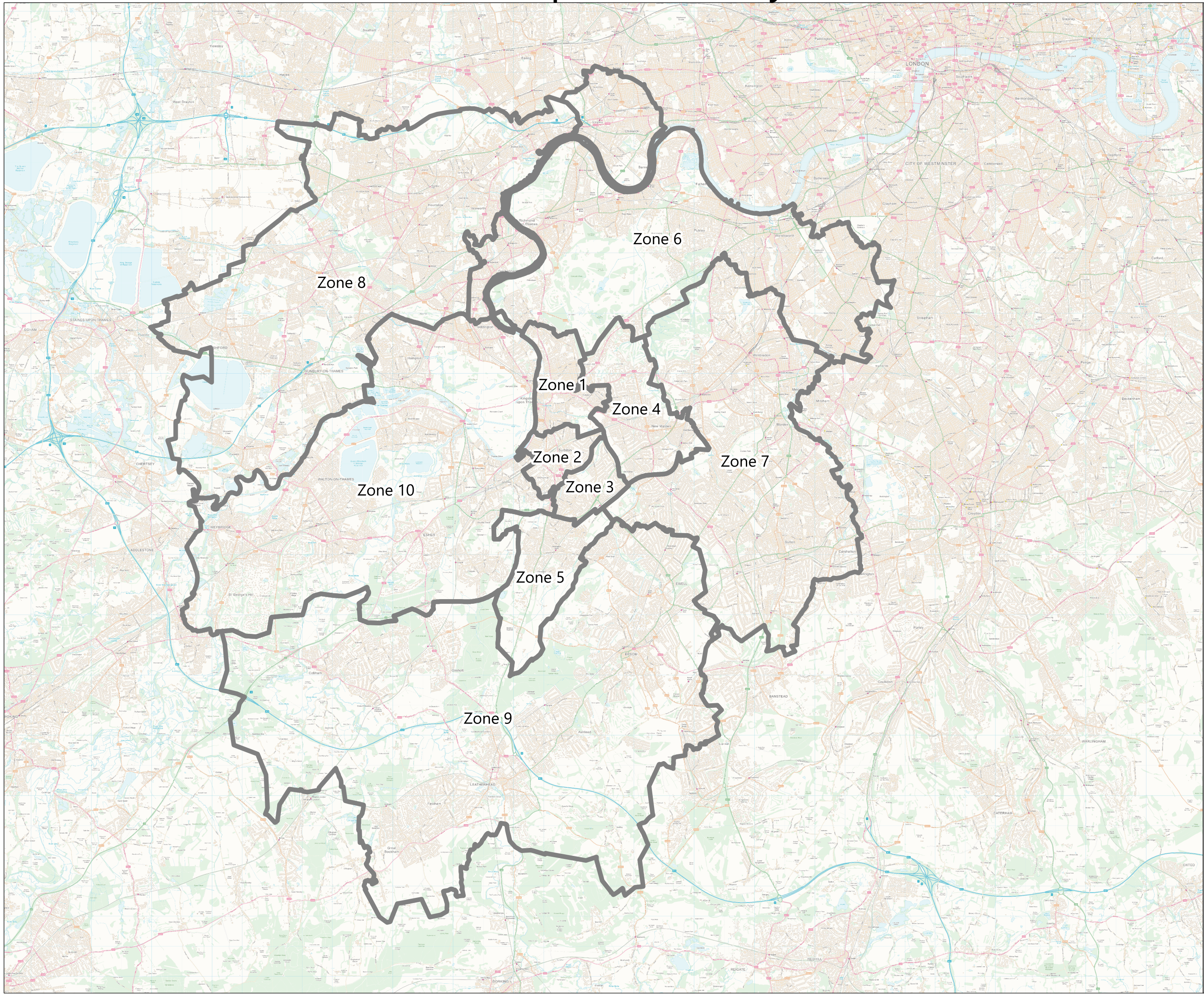
Appendix 3

Zone 1-10 Survey Area Plan

Telephone Survey Areas - Postcode Sectors



Survey Zone Boundary

Operator:	S Ruddick
Department:	Survey
Drawing No:	PS01
Date: 29/01/2024	Scale: 1:150000

urban shape
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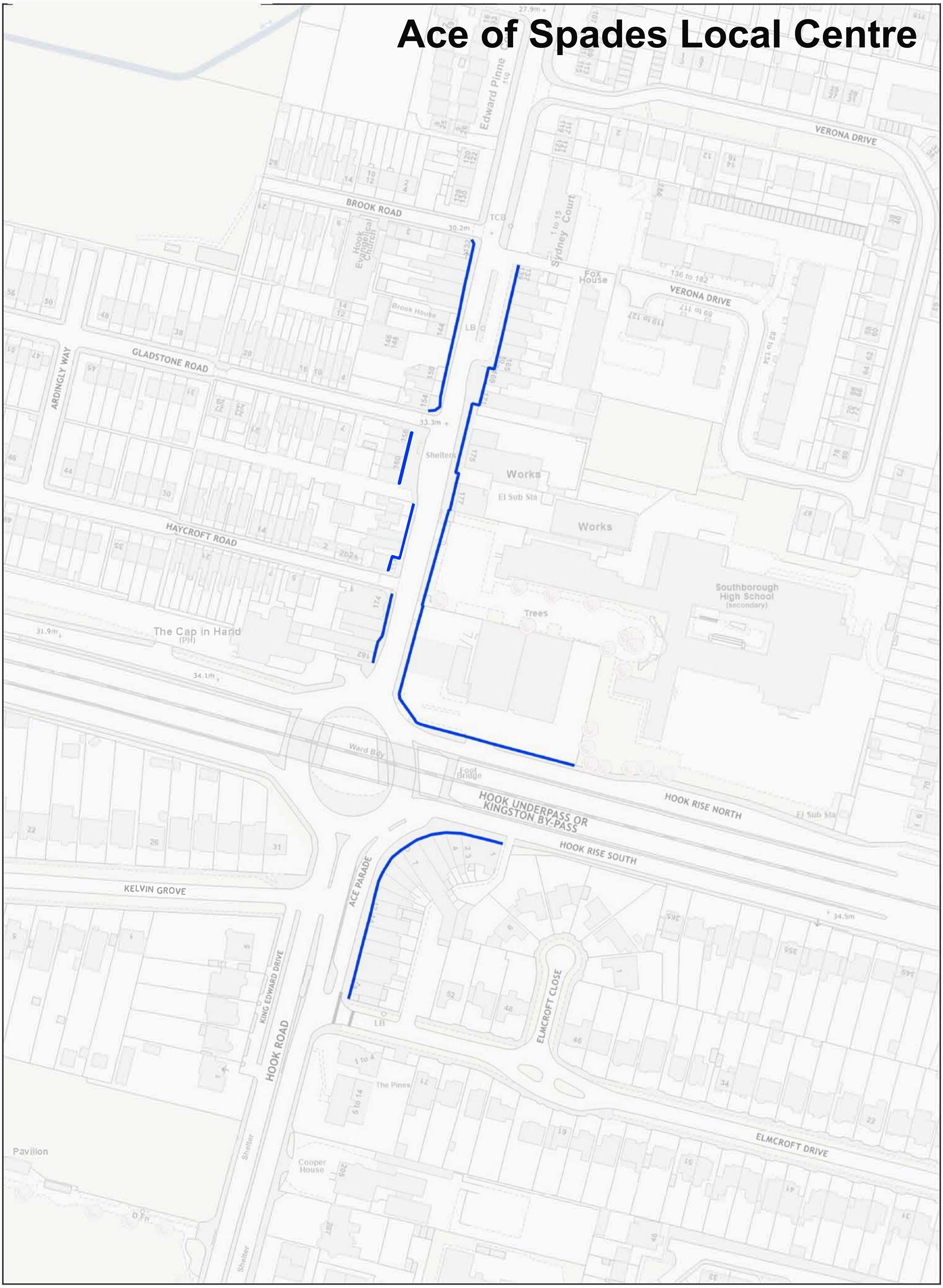
Appendix 4

Local Centre Plans

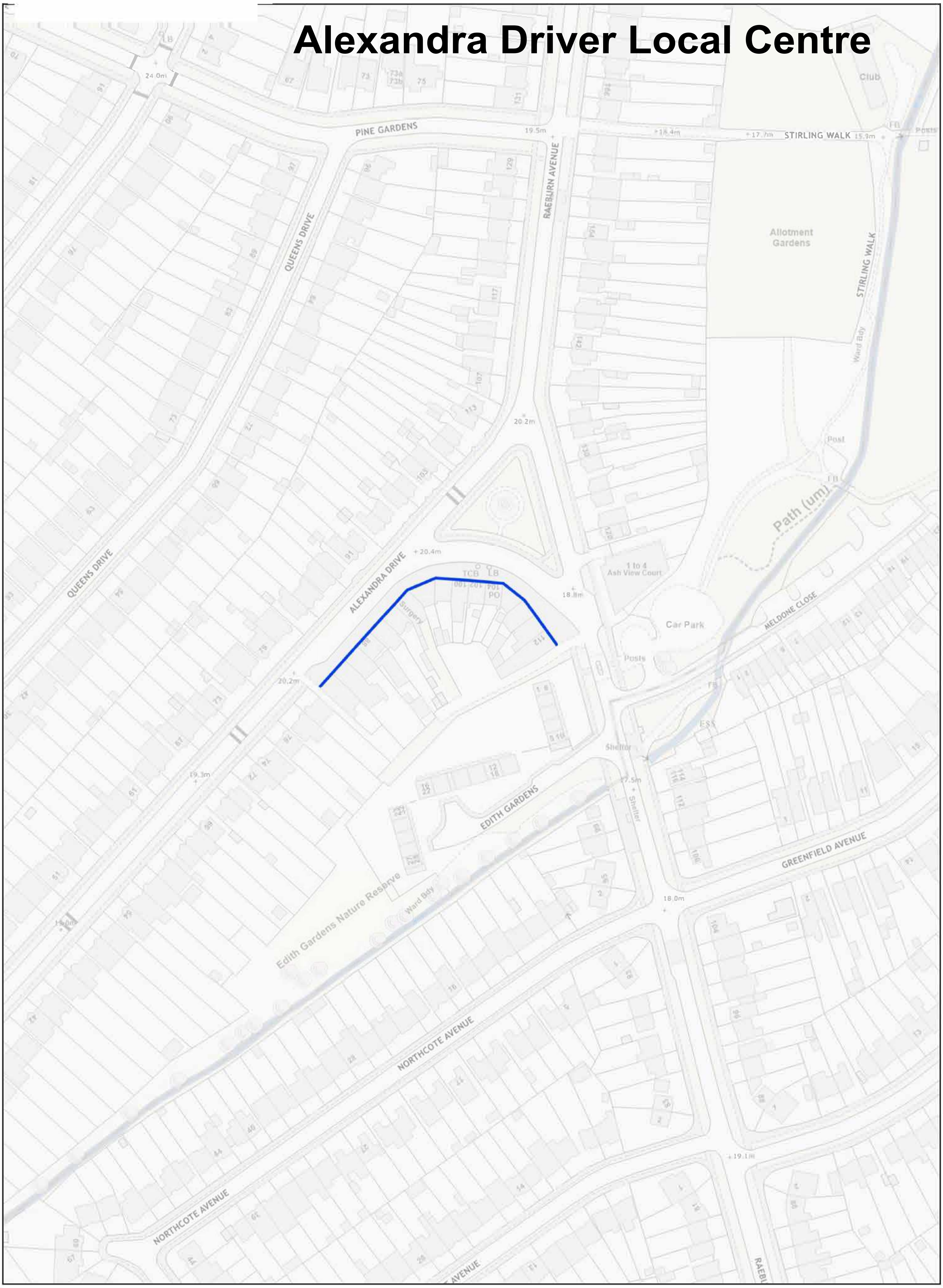
1:1500



Ace of Spades Local Centre
BROOK ROAD
GLADSTONE ROAD
HAYCROFT ROAD
ARDINGLY WAY
VERONA DRIVE
Edward Pinner
Sydney Court
Fox House
Hook Evangelical Church
Brook House
Shelters
Works
El Sub Sta
Southborough High School (secondary)
Trees
The Cap in Hand (PH)
Ward Bay
Foot Bridge
HOOK UNDERPASS OR KINGSTON BY-PASS
HOOK RISE NORTH
HOOK RISE SOUTH
ACE PARADE
KELVIN GROVE
KING EDWARD DRIVE
HOOK ROAD
ELMCROFT CLOSE
ELMCROFT DRIVE
The Pines
Cooper House
Pavilion
Shelter

1:1500

Alexandra Driver Local Centre



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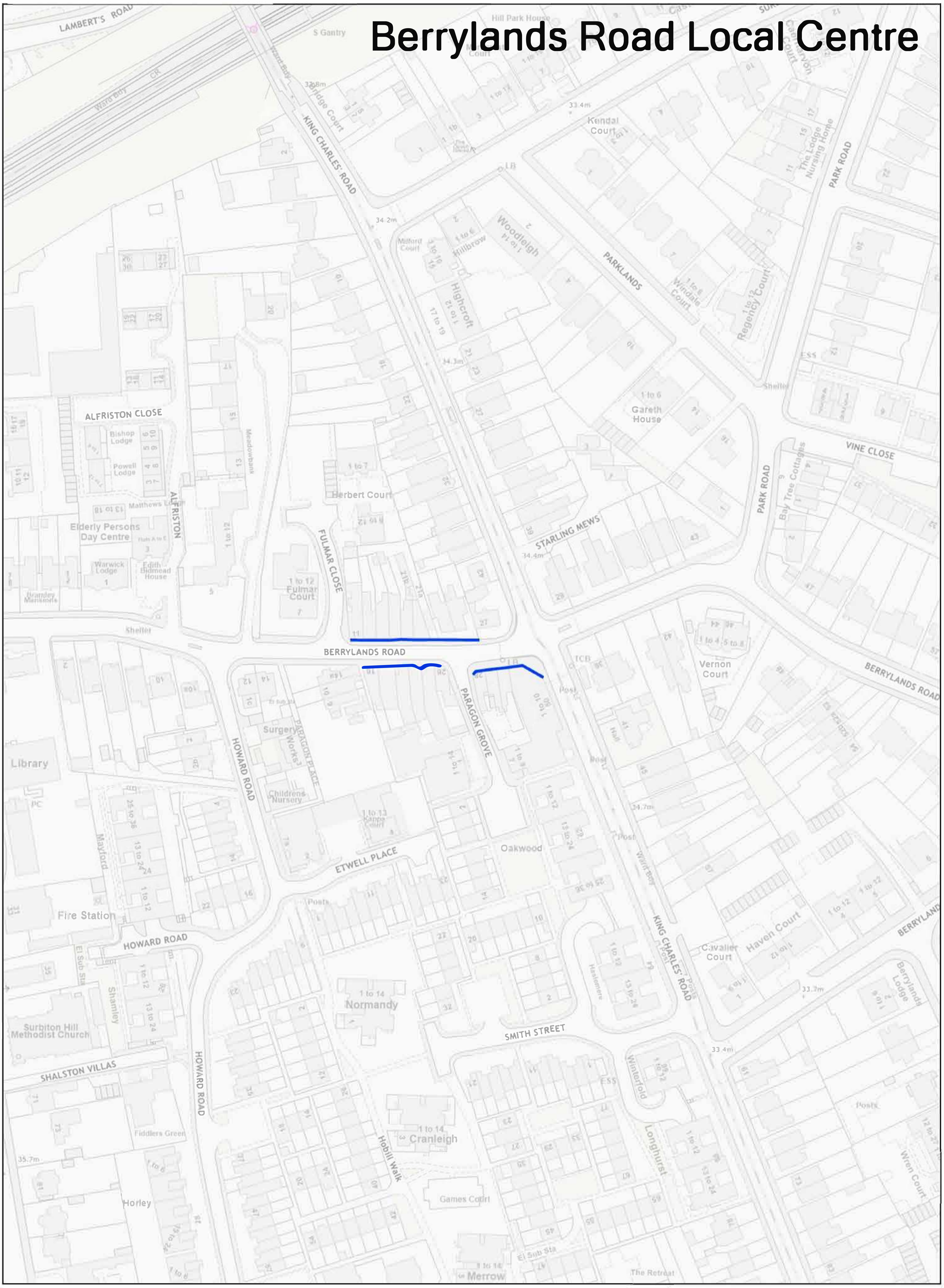
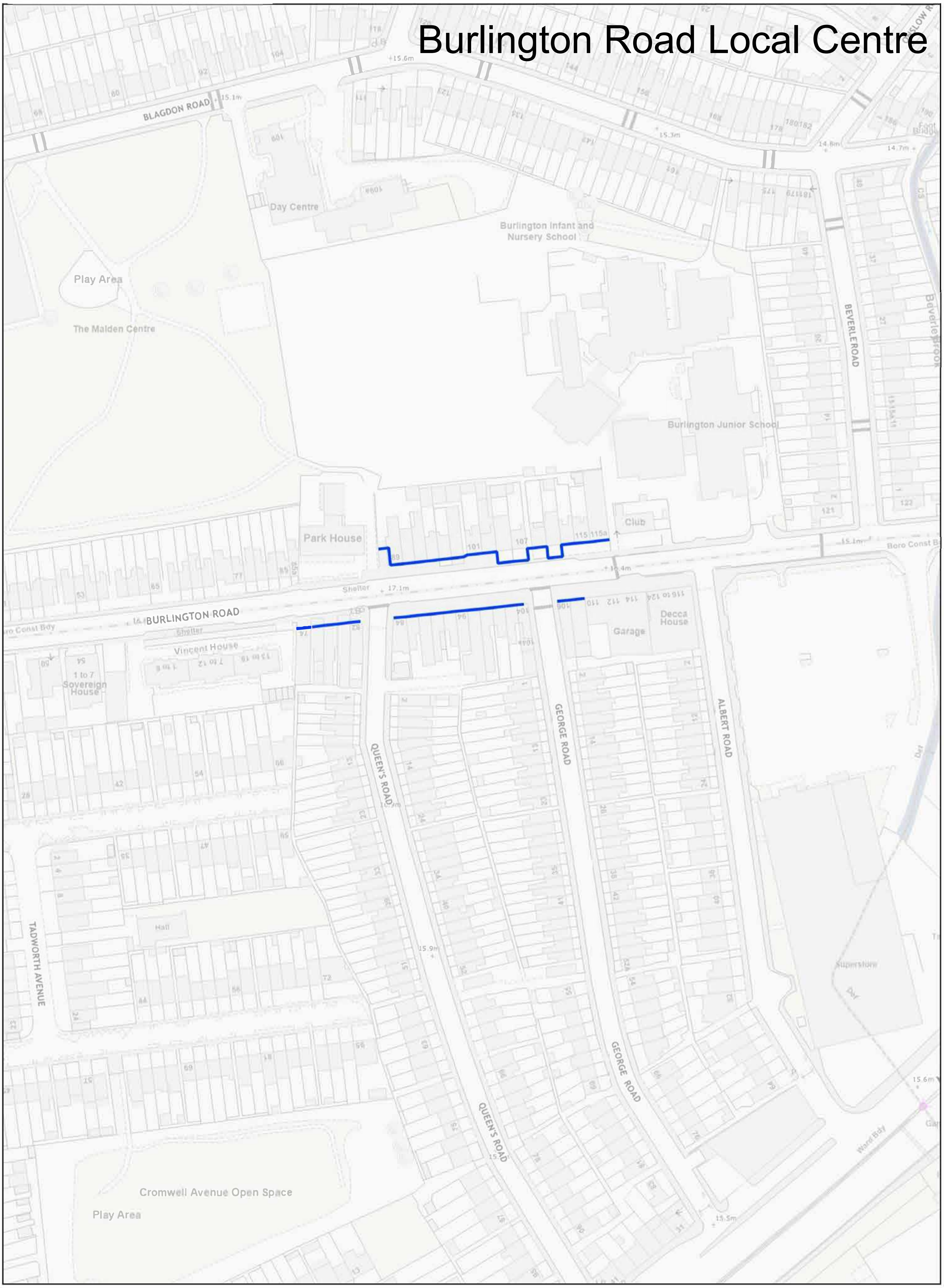

Berrylands Road Local Centre
LAMBERT'S ROAD
KING CHARLES ROAD
PARKLANDS
PARK ROAD
VINE CLOSE
ALFRISTON CLOSE
FULMAR CLOSE
STARLING MEWS
BERRYLANDS ROAD
PARAGON GROVE
HOWARD ROAD
ETWELL PLACE
SMITH STREET
SHALSTON VILLAS
Library
Fire Station
Surbiton Hill Methodist Church
Oakwood
Normandy
Cranleigh
Hobill Walk
Vernon Court
Haven Court
Cavalier Court
Herbert Court
Elderly Persons Day Centre

1:1500

Burlington Road Local Centre

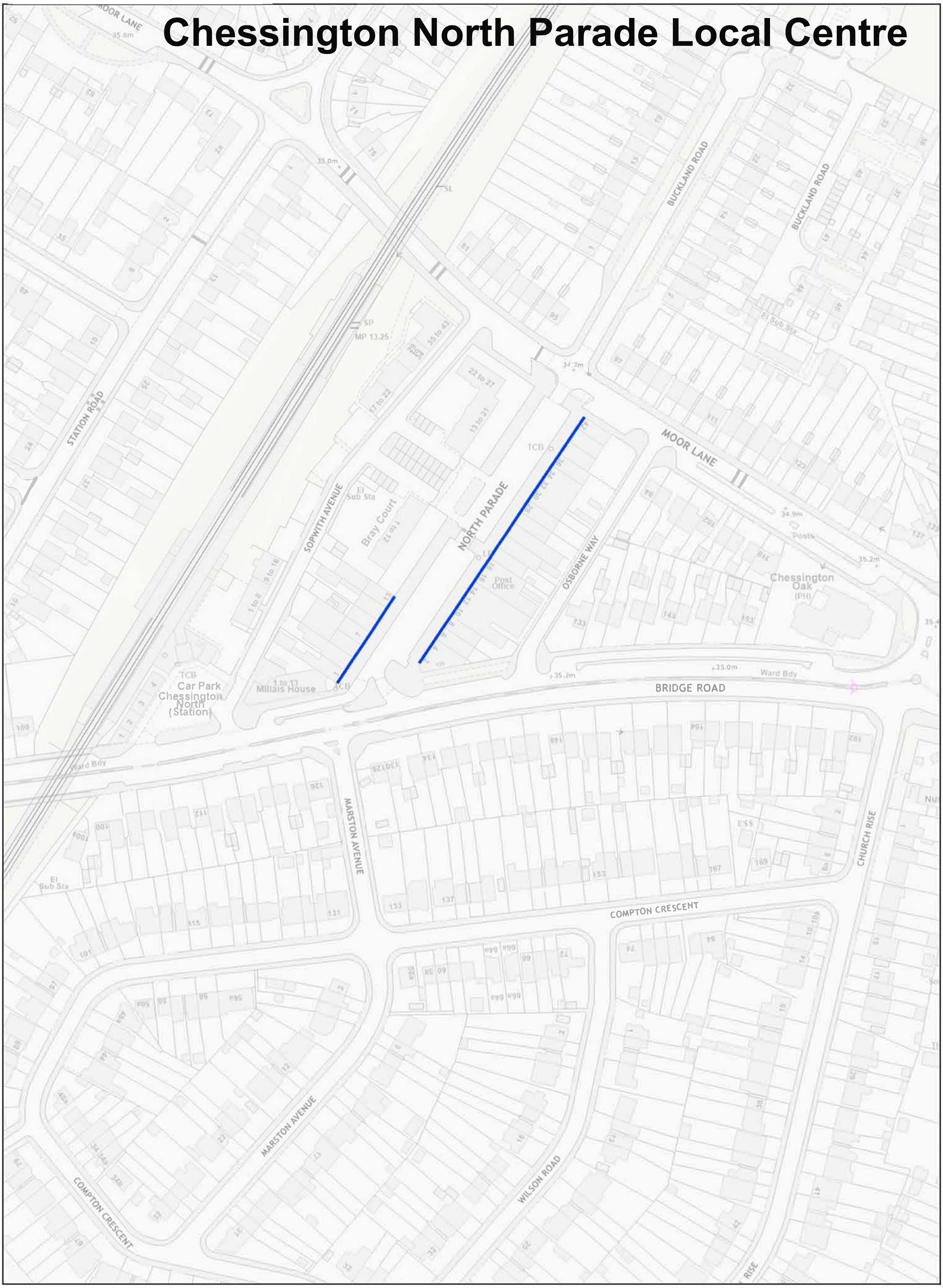


1:1500

Cambridge Road Local Centre

1:1500

Chessington North Parade Local Centre



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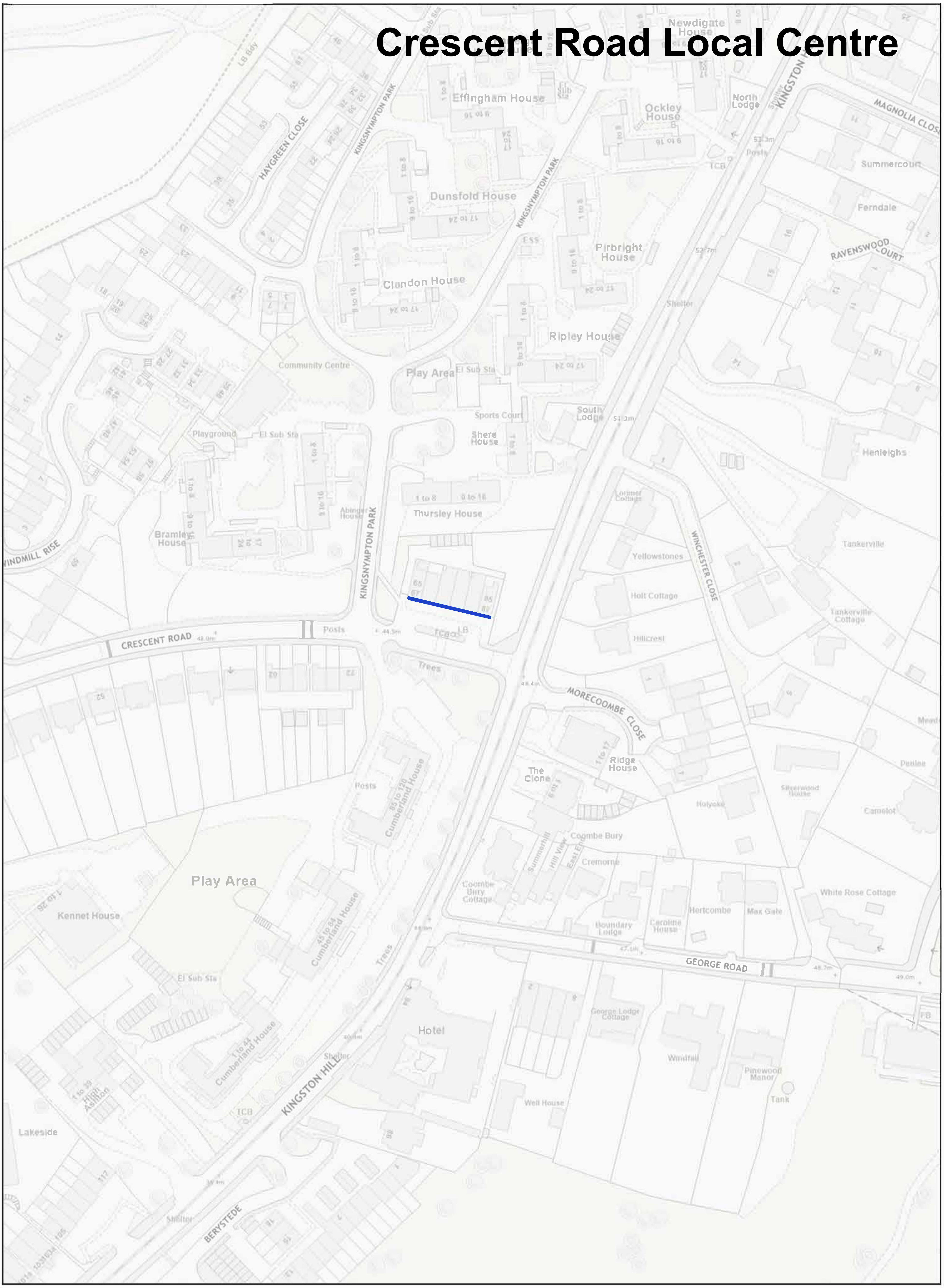
Chiltern Drive Local Centre

1:1500

Crescent Road Local Centre



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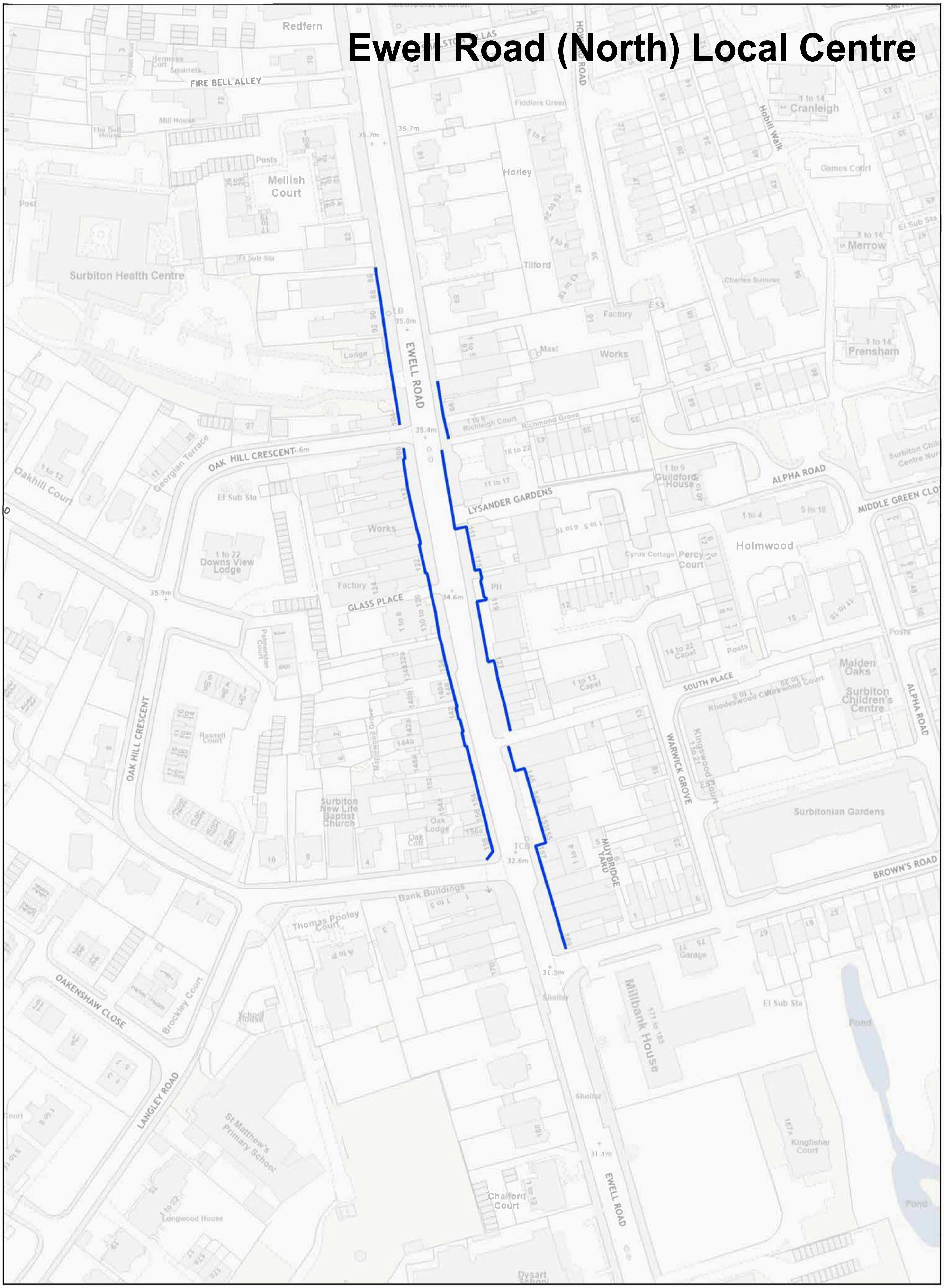
Ewell Road (North) Local Centre



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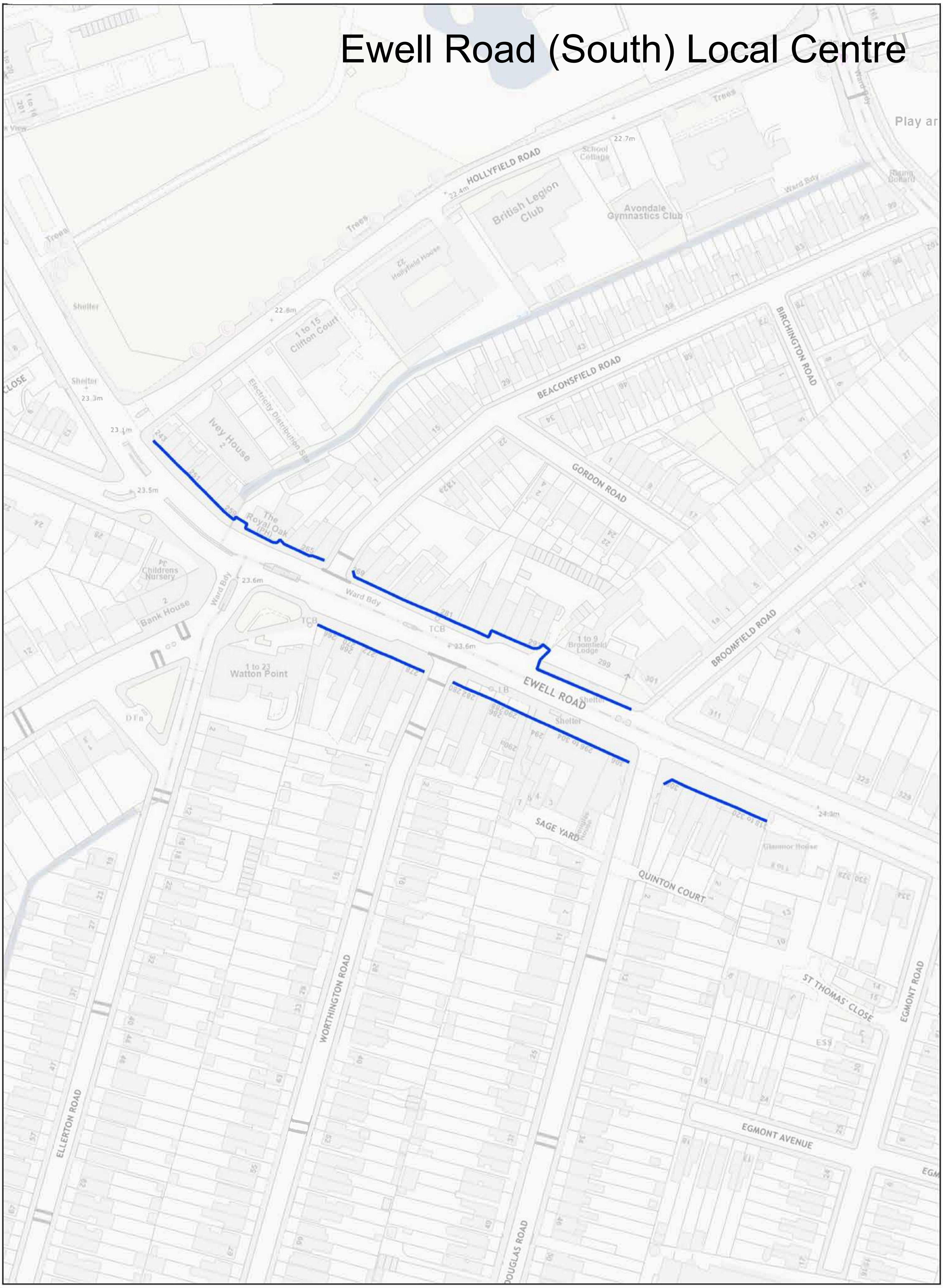
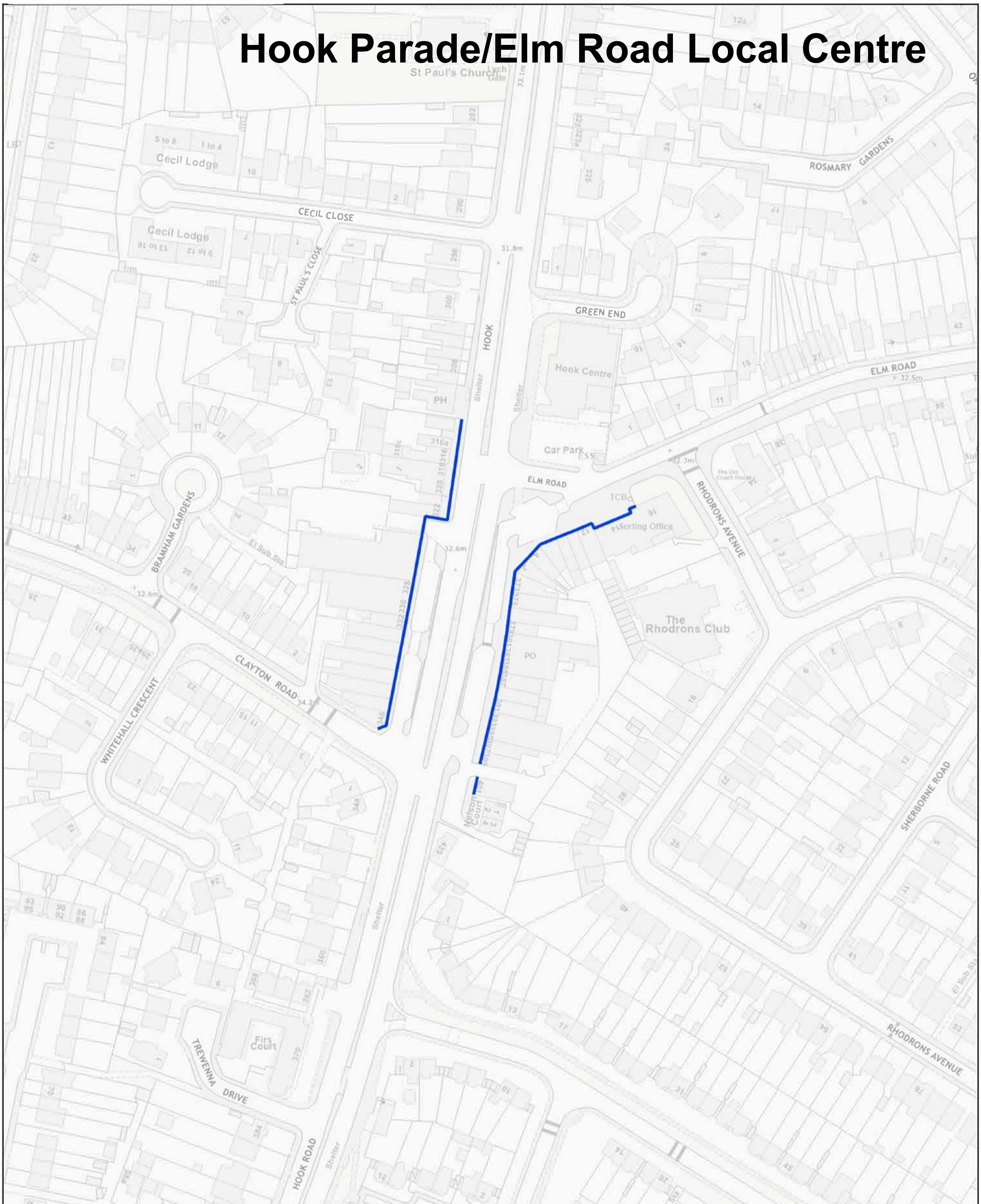

Ewell Road (South) Local Centre
EWELL ROAD
HOLLYFIELD ROAD
BEACONSFIELD ROAD
GORDON ROAD
BIRCHINGTON ROAD
BROOMFIELD ROAD
WORTHINGTON ROAD
ELLERTON ROAD
DOUGLAS ROAD
EGMONT ROAD
EGMONT AVENUE
ST THOMAS' CLOSE
QUINTON COURT
SAGE YARD
British Legion Club
Avondale Gymnastics Club
Ivey House
The Royal Oak (PH)
1 to 15 Clifton Court
1 to 23 Watton Point
Bank House
Childrens Nursery
Glanmor House
Play ar

1:1500

Hook Parade/Elm Road Local Centre



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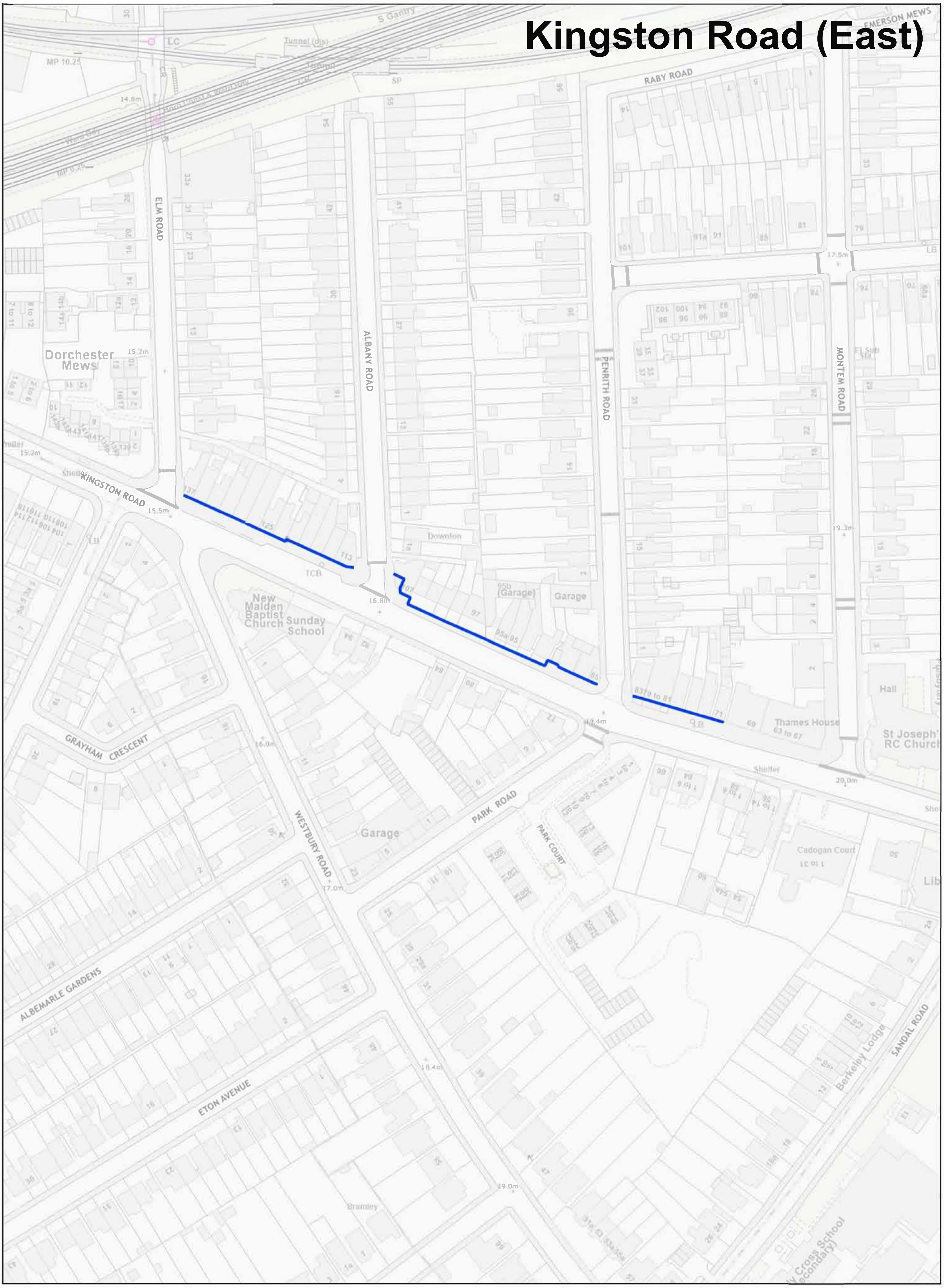
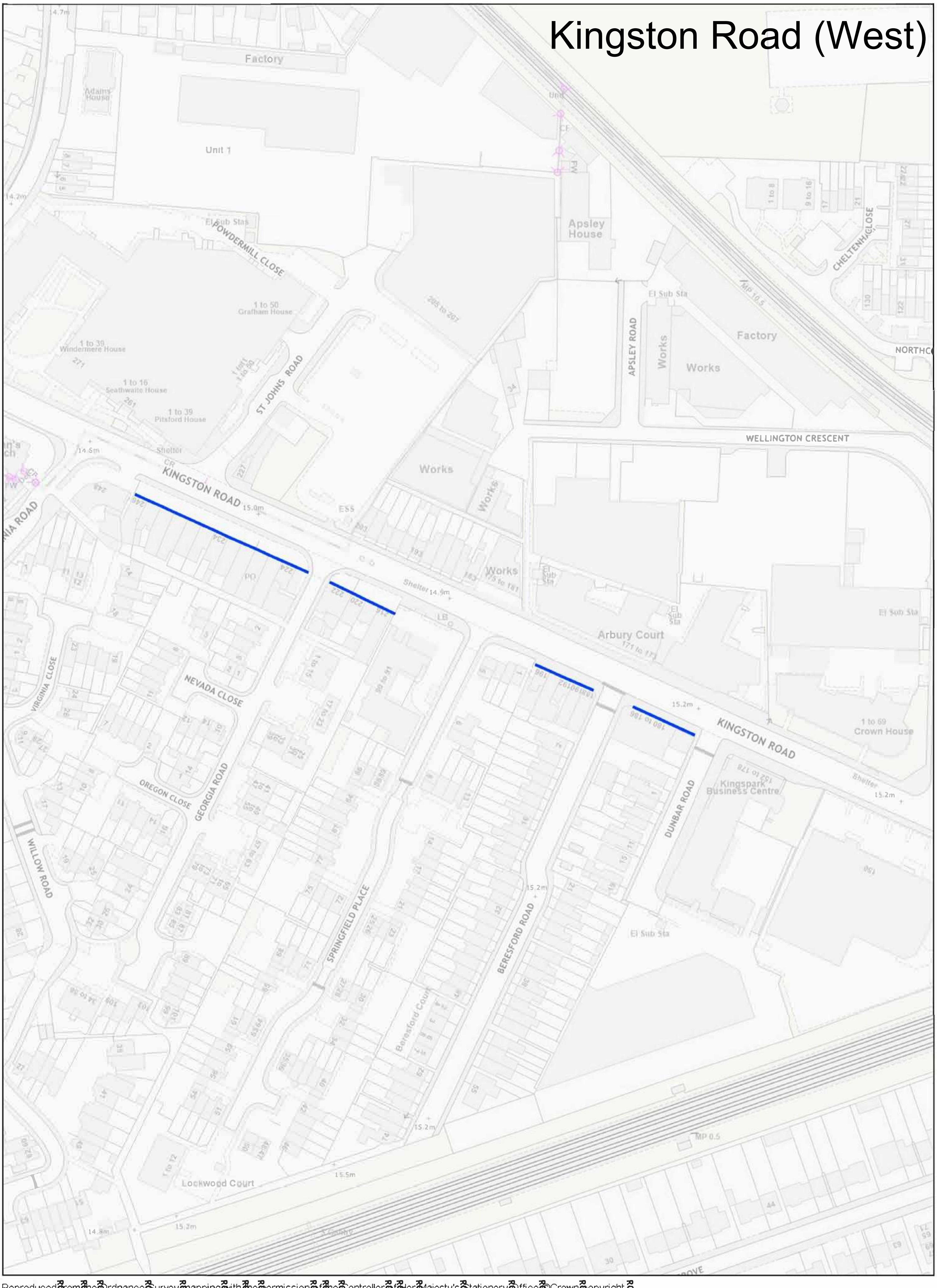
Kings Road Local Centre
EARLE GARDENS
PARK FARM ROAD
STAUNTON ROAD
CHESFIELD ROAD
BURTON ROAD
KING'S ROAD
RICHMOND PARK ROAD
GIBBON ROAD
ACRE ROAD
HARDINGS CLOSE
The Keep
Tennis Court
Squash Court
El Sub Sta
Vicarage
St Luke's Church
Murray House
Delft House
Builders Yard
Cowler Court
Sobraon

1:1500

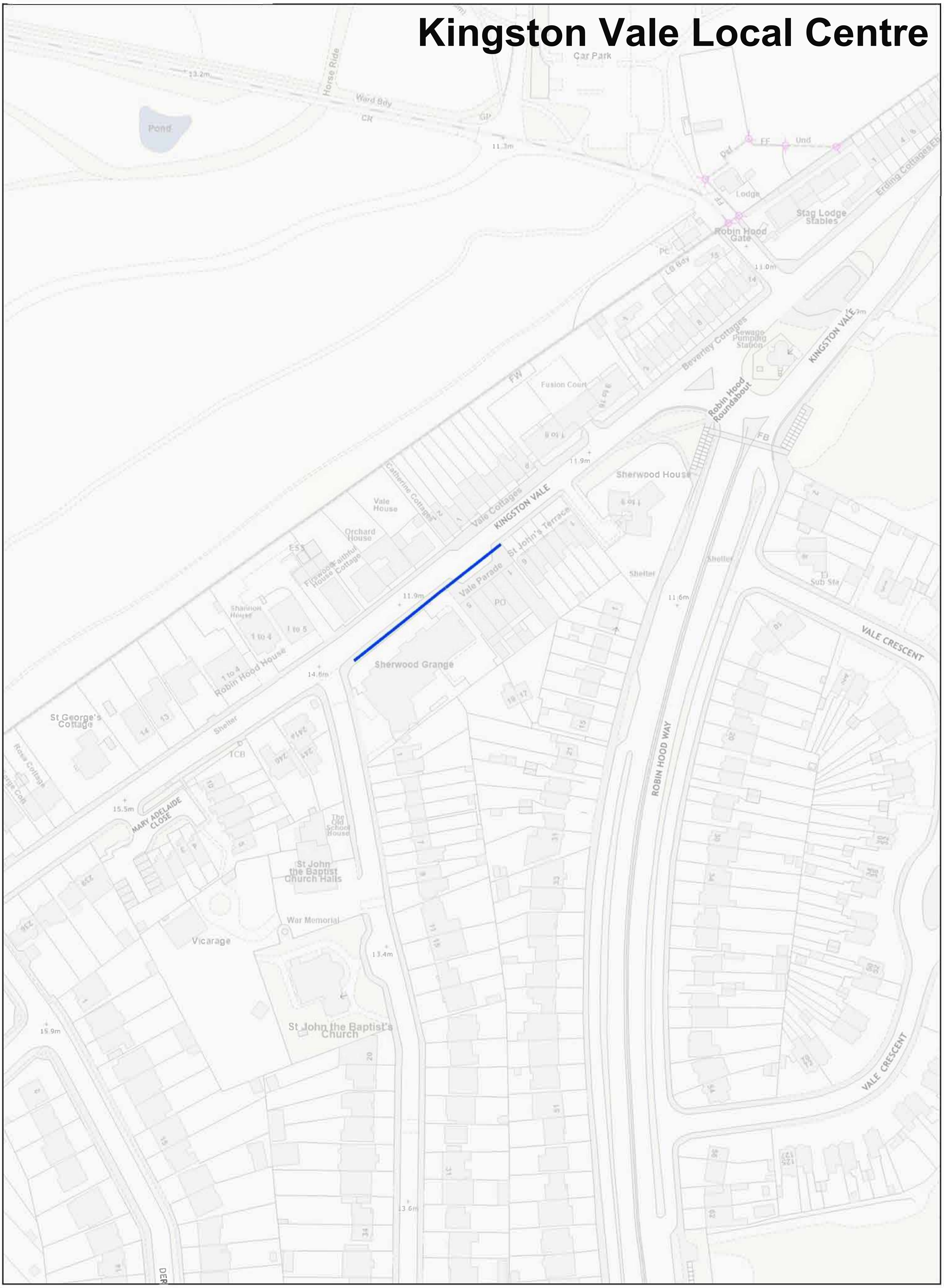

Kingston Road (East)
KINGSTON ROAD
ELM ROAD
ALBANY ROAD
PENRITH ROAD
MONTEM ROAD
RABY ROAD
EMERSON MEWS
Dorchester Mews
GRAYHAM CRESCENT
WESTBURY ROAD
PARK ROAD
PARK COURT
ALBEMARLE GARDENS
ETON AVENUE
SANDAL ROAD
New Malden Baptist Church
Sunday School
Garage
Thames House
St Joseph's RC Church
Cadogan Court
Berkeley Lodge
Hall
Downton

1:1500

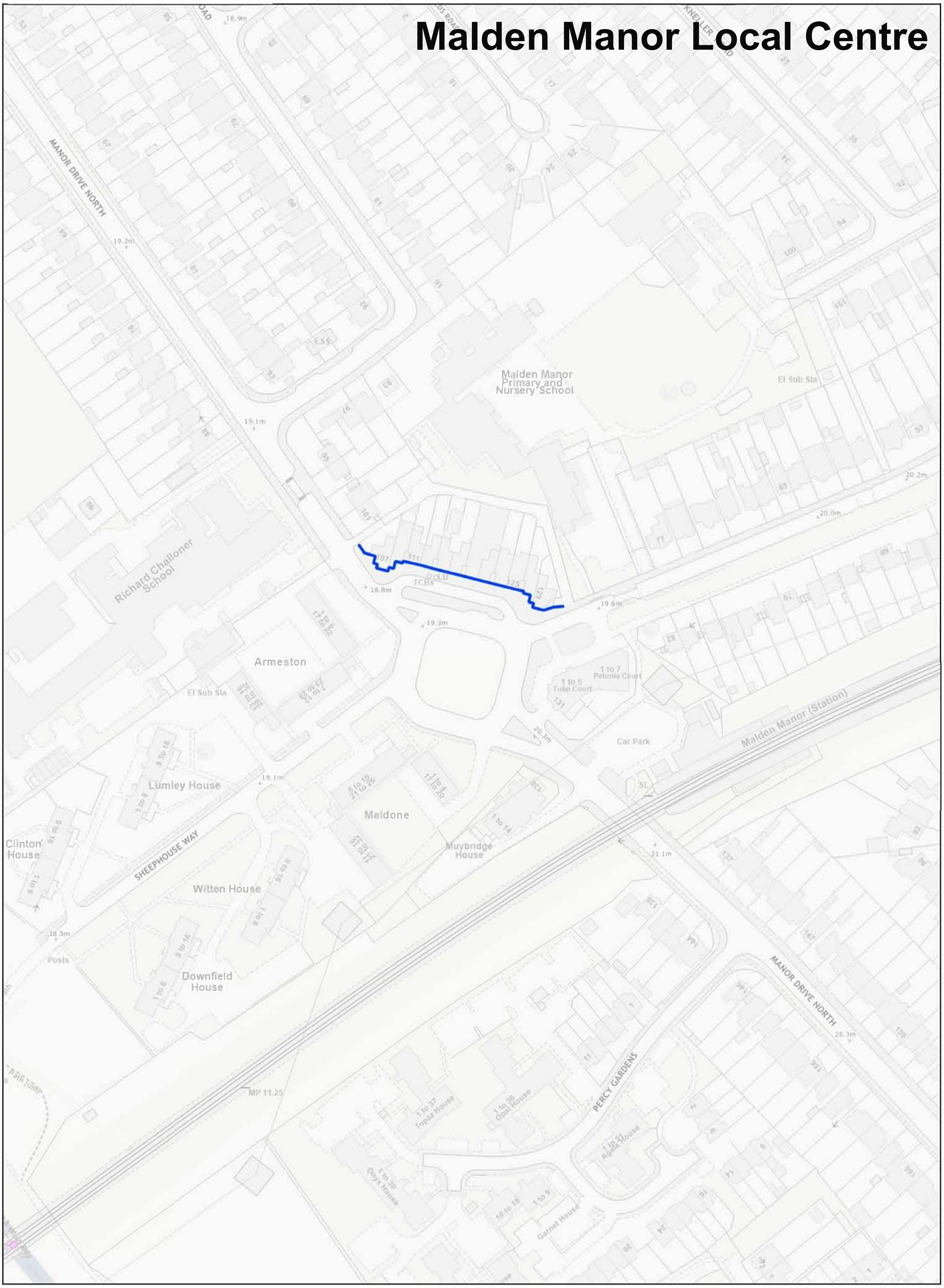


Kingston Road (West)
Factory
Adams House
Unit 1
El Sub Sta
POWDERMILL CLOSE
Apsley House
1 to 50 Grafham House
1 to 39 Windermere House
1 to 16 Seathwaite House
1 to 39 Pitsford House
ST JOHNS ROAD
205 to 207
APSLEY ROAD
Works
Factory
CHELTENHAM CLOSE
NORTHC
WELLINGTON CRESCENT
KINGSTON ROAD
Shelter
Works
Arbury Court
171 to 173
El Sub Sta
NEVADA CLOSE
VIRGINIA CLOSE
OREGON CLOSE
GEORGIA ROAD
WILLOW ROAD
SPRINGFIELD PLACE
BERESFORD ROAD
Beresford Court
DUNBAR ROAD
1 to 69 Crown House
Kingspark Business Centre
152 to 178
Lockwood Court
MP 0.5

1:1500


Kingston Vale Local Centre
Car Park
Horse Ride
Pond
Robin Hood Gate
Stag Lodge Stables
Lodge
Beverley Cottages
Sewage Pumping Station
Robin Hood Roundabout
KINGSTON VALE
Fusion Court
Sherwood House
Vale Cottages
Catherine Cottages
Vale House
Orchard House
Faithful Cottage
St John's Terrace
Vale Parade
PO
Shelter
Sherwood Grange
Robin Hood House
Shannon House
St George's Cottage
Rose Cottage
MARY ADELAIDE CLOSE
The Old School House
St John the Baptist Church Halls
War Memorial
Vicarage
St John the Baptist's Church
ROBIN HOOD WAY
VALE CRESCENT
Sub Sta

1:1500



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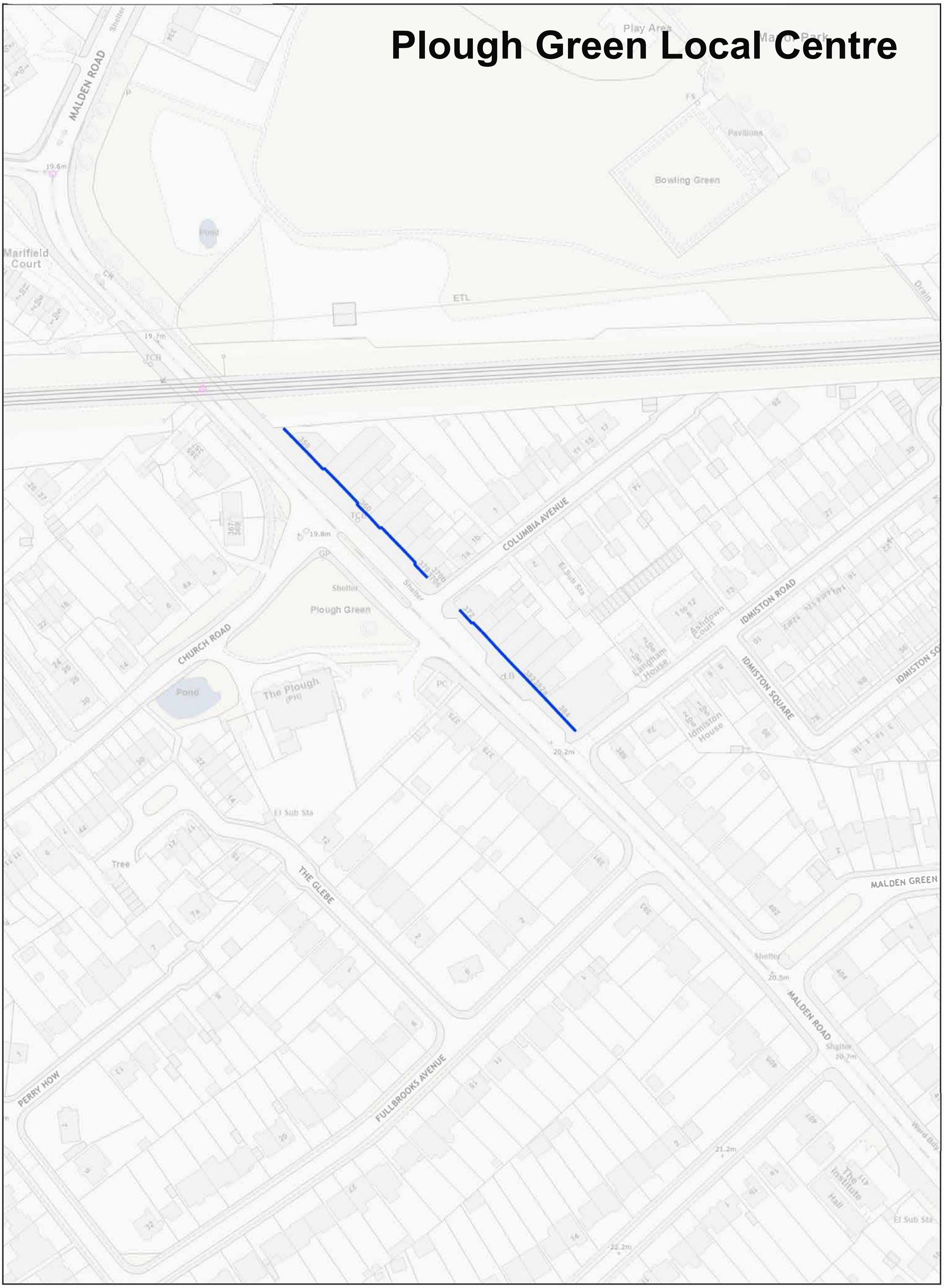
Plough Green Local Centre

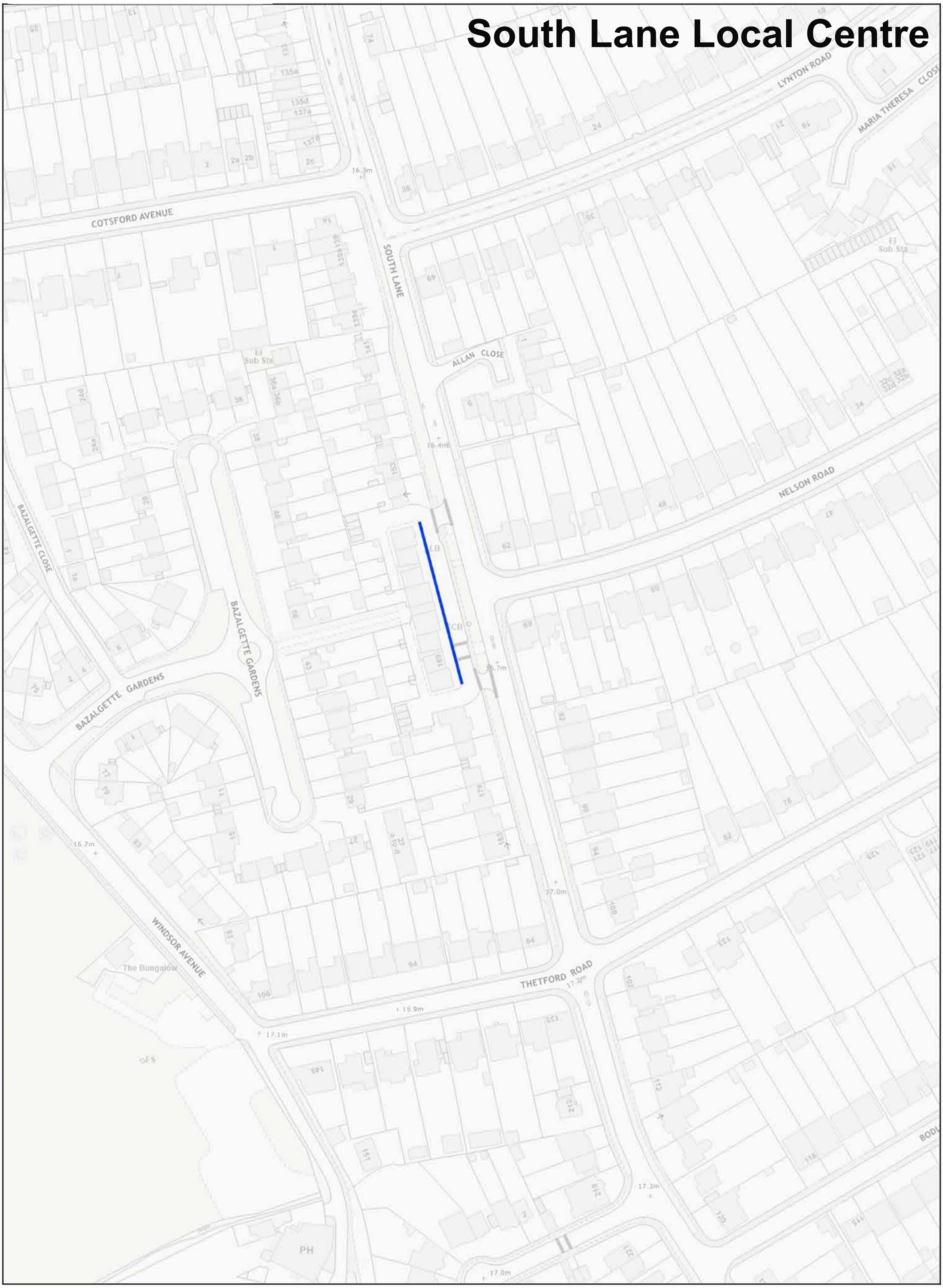


1:1500

Richmond Road Local Centre
ALBANY PARK ROAD
Homington Court
Riverview House
BANK LANE
BERKELEY CLOSE
Walton House
ARCHER CLOSE
Playground
Filling Station
King's Penny House
1 to 42 Canbury Court
OSBORNE ROAD
WOODSIDE ROAD
RICHMOND ROAD
THORPE ROAD
WINDSOR ROAD
PH
LB
Watermans Close
CHESTNUT ROAD
BEARFIELD ROAD
LOWER HAM ROAD
EASTBURY ROAD
KING'S ROAD
Childrens Nursery
LOWER KINGS ROAD
El Sub Sta

1:1500

South Lane Local Centre



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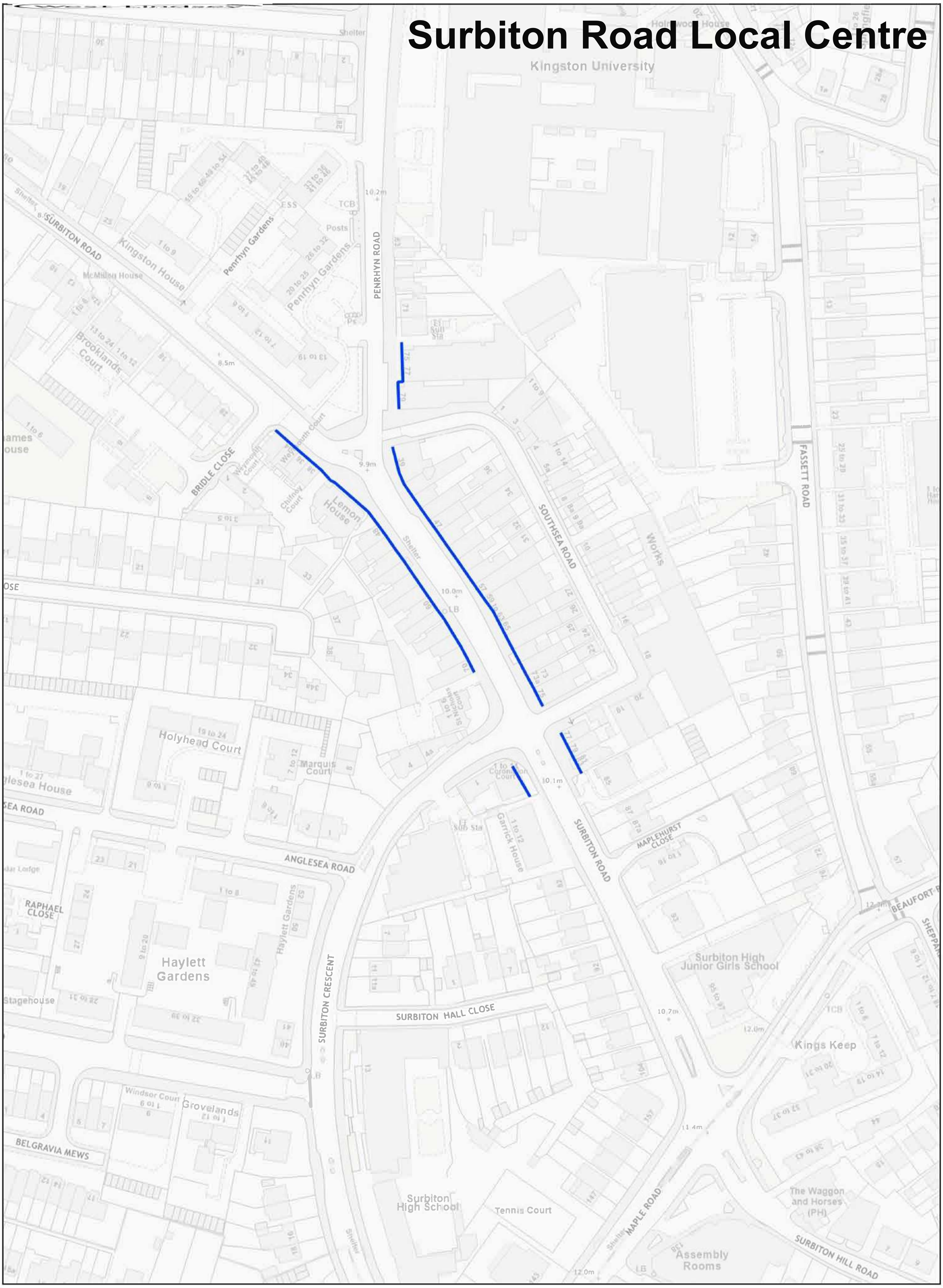
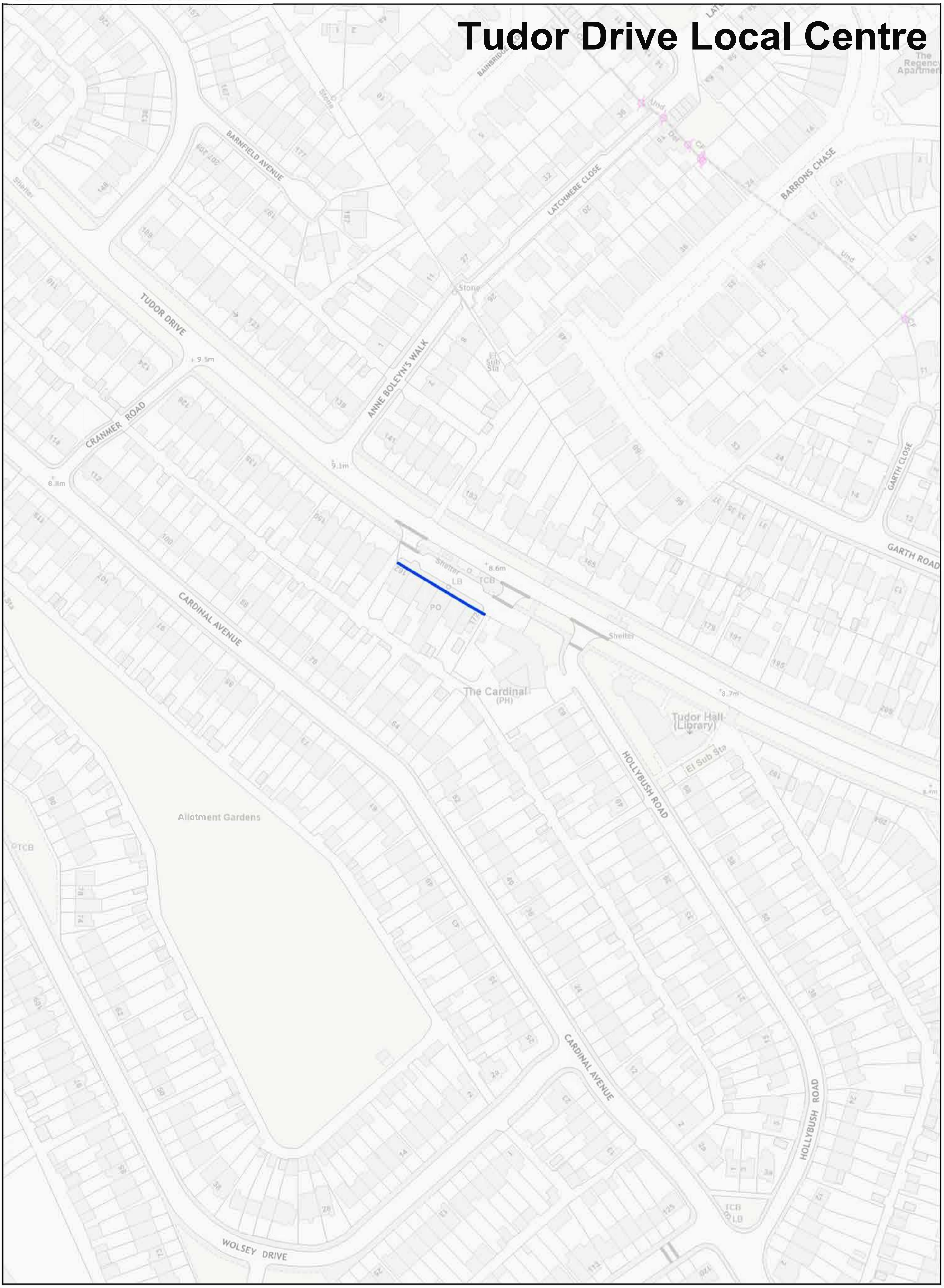
Surbiton Road Local Centre



The Triangle Local Centre

1:1500

Tudor Drive Local Centre

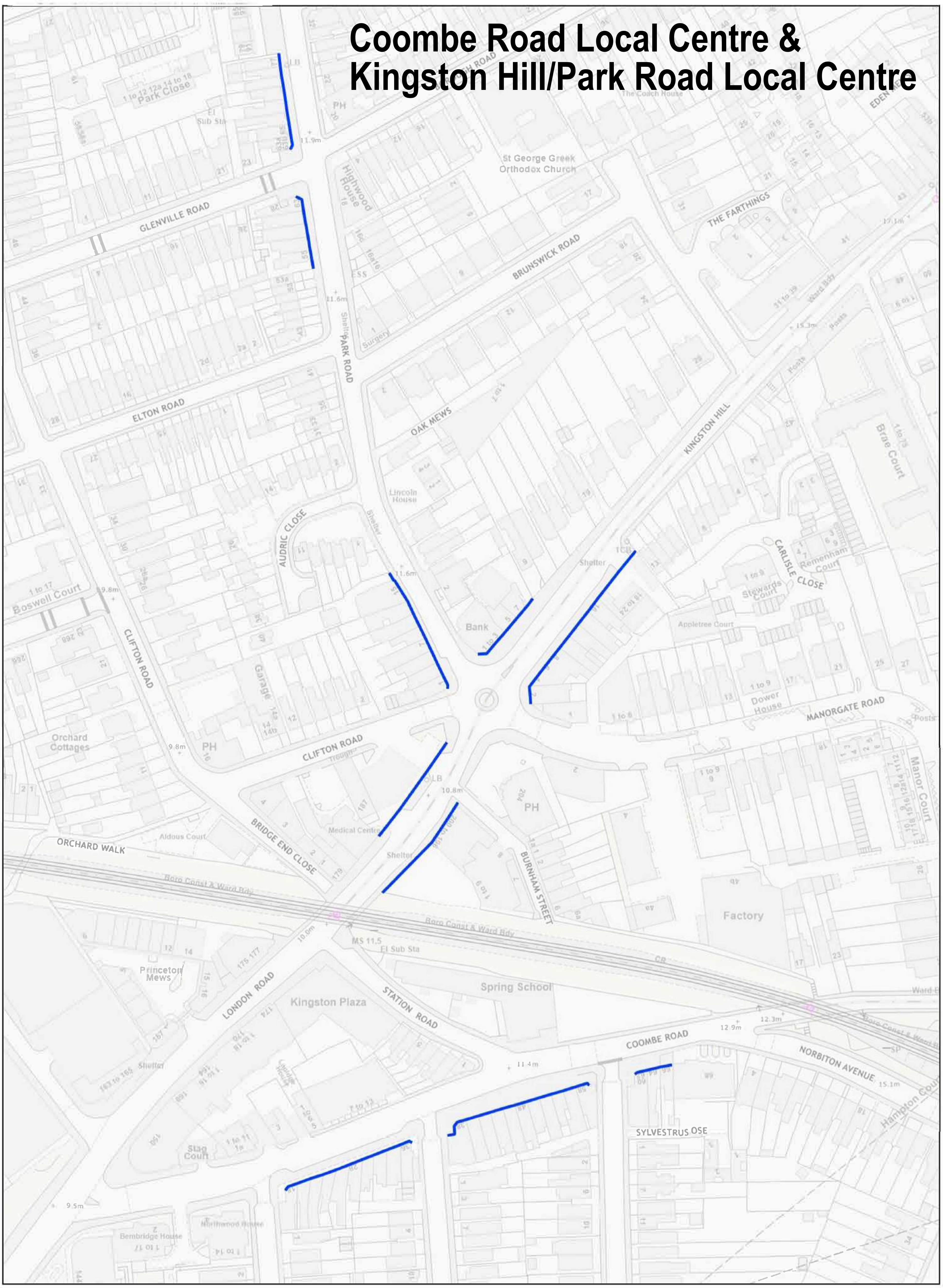


1:1500


Villiers Avenue Local Centre
Ambulance Station
Saxon House
Athelstan House
GLENTHORNE ROAD
BALMORAL ROAD
VILLIERS ROAD
AUCKLAND ROAD
BUCKINGHAM ROAD
GROVE LANE
GROVE CLOSE
MARGARET LOCKWOOD CLOSE
LOWER MARSH LANE
LINGFIELD AVENUE
HARLOW GARDENS
MILES PLACE
VILLIERS CLOSE
CRANES PARK AVENUE
CHEYNE HILL
VILLIERS AVENUE
CHUMLEIGH WALK
CRANES PARK CRESCENT
Oldfield Court
The Lilacs
EVERSLEY ROAD
Drain
PH

1:1500

Coombe Road Local Centre & Kingston Hill/Park Road Local Centre



urban shape
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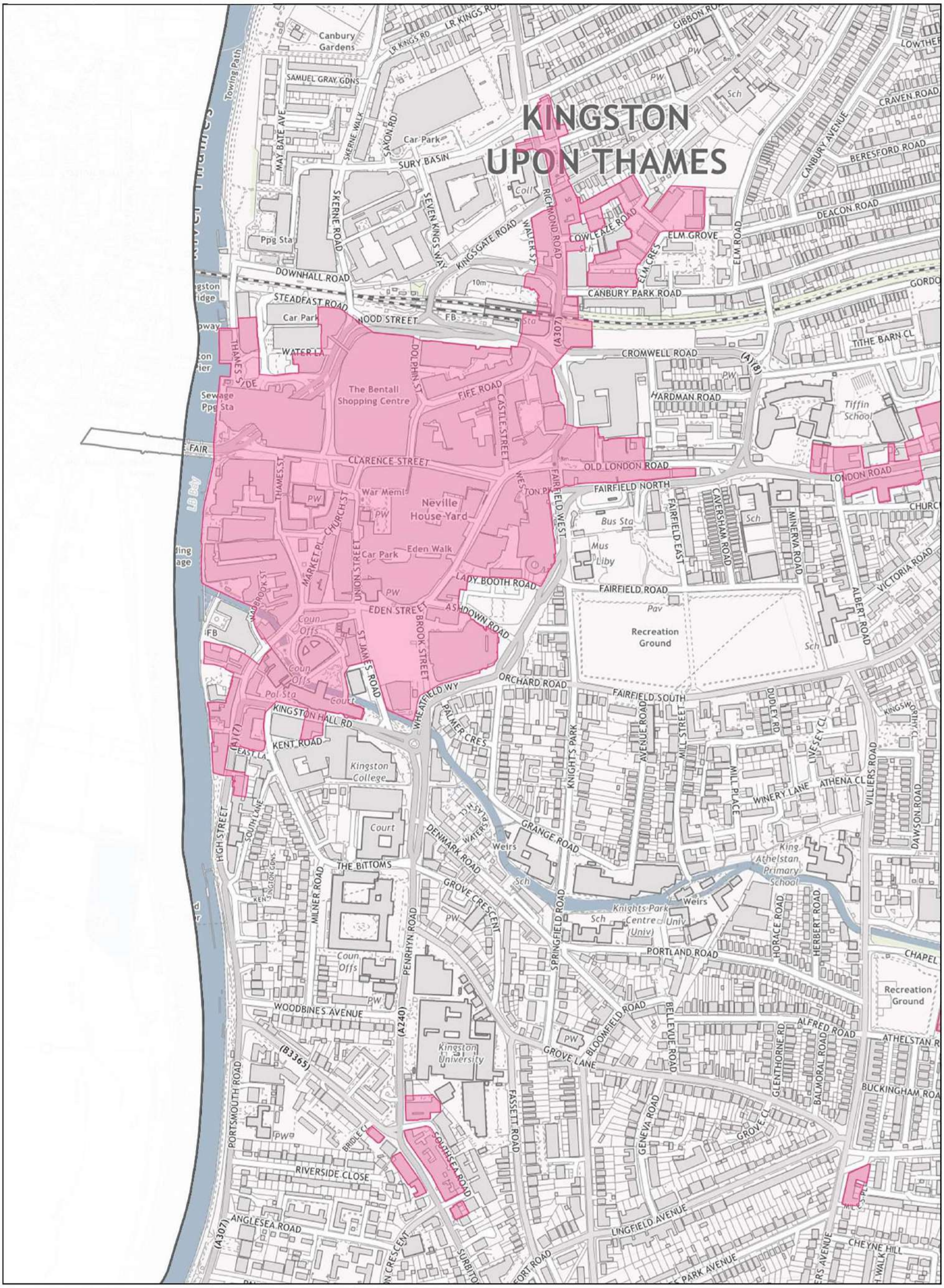
Appendix 5

Article 4 Direction
Town Centre Plans

Kingston Town Centre: Article 4 Boundary Plan



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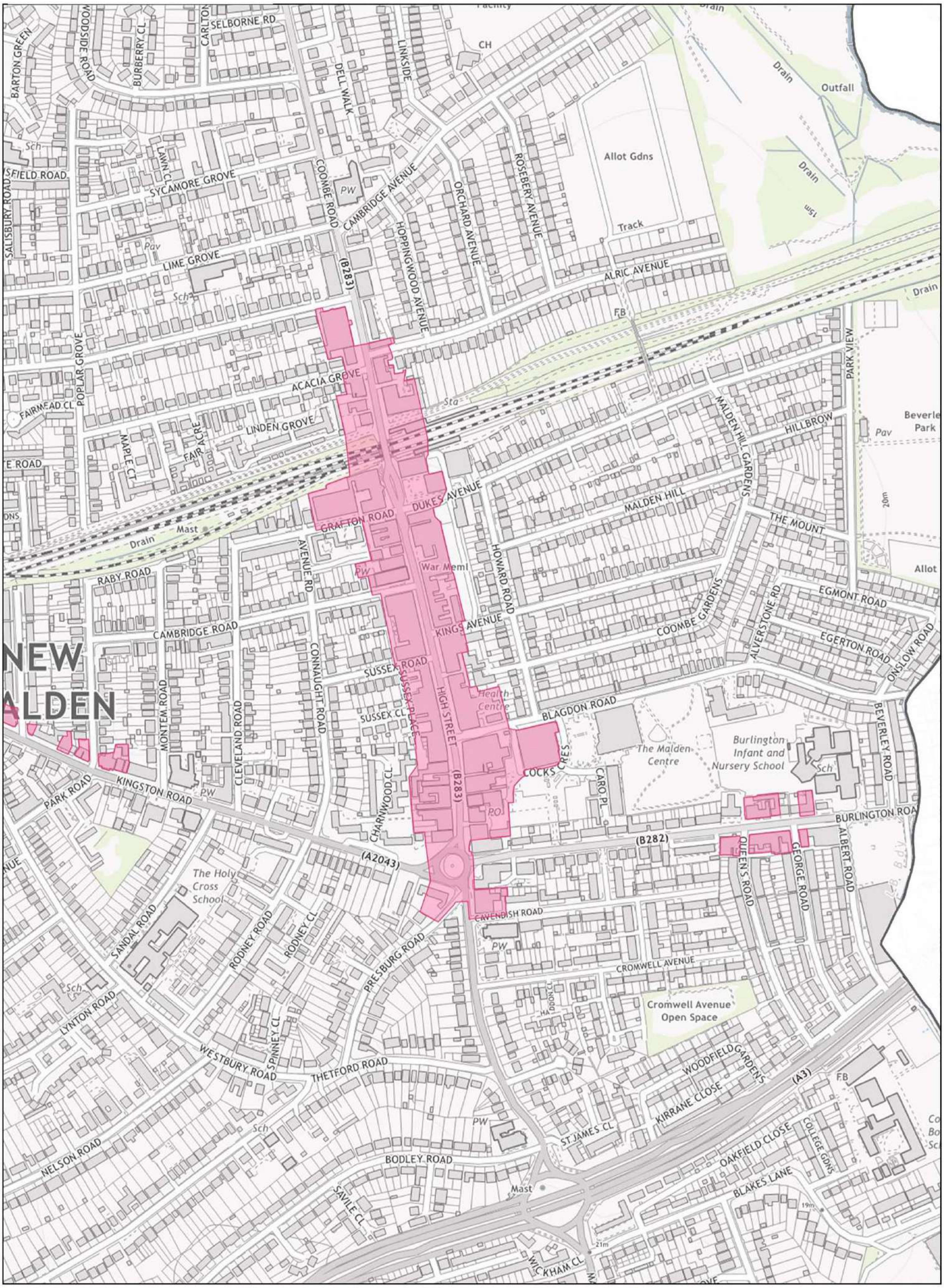
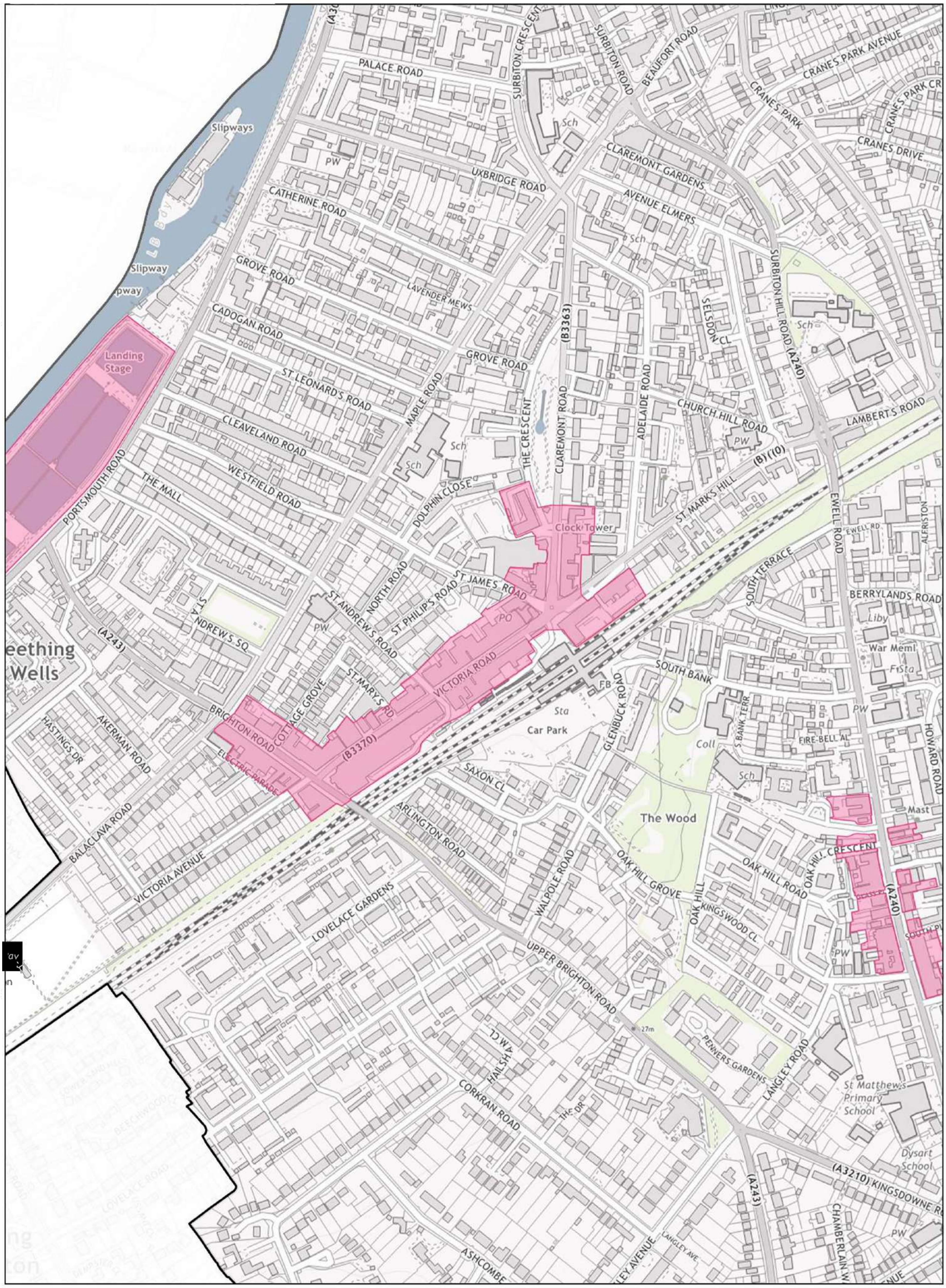
New Malden District Centre: Article 4 Boundary Plan



Surbiton District Centre: Article 4 Boundary Plan



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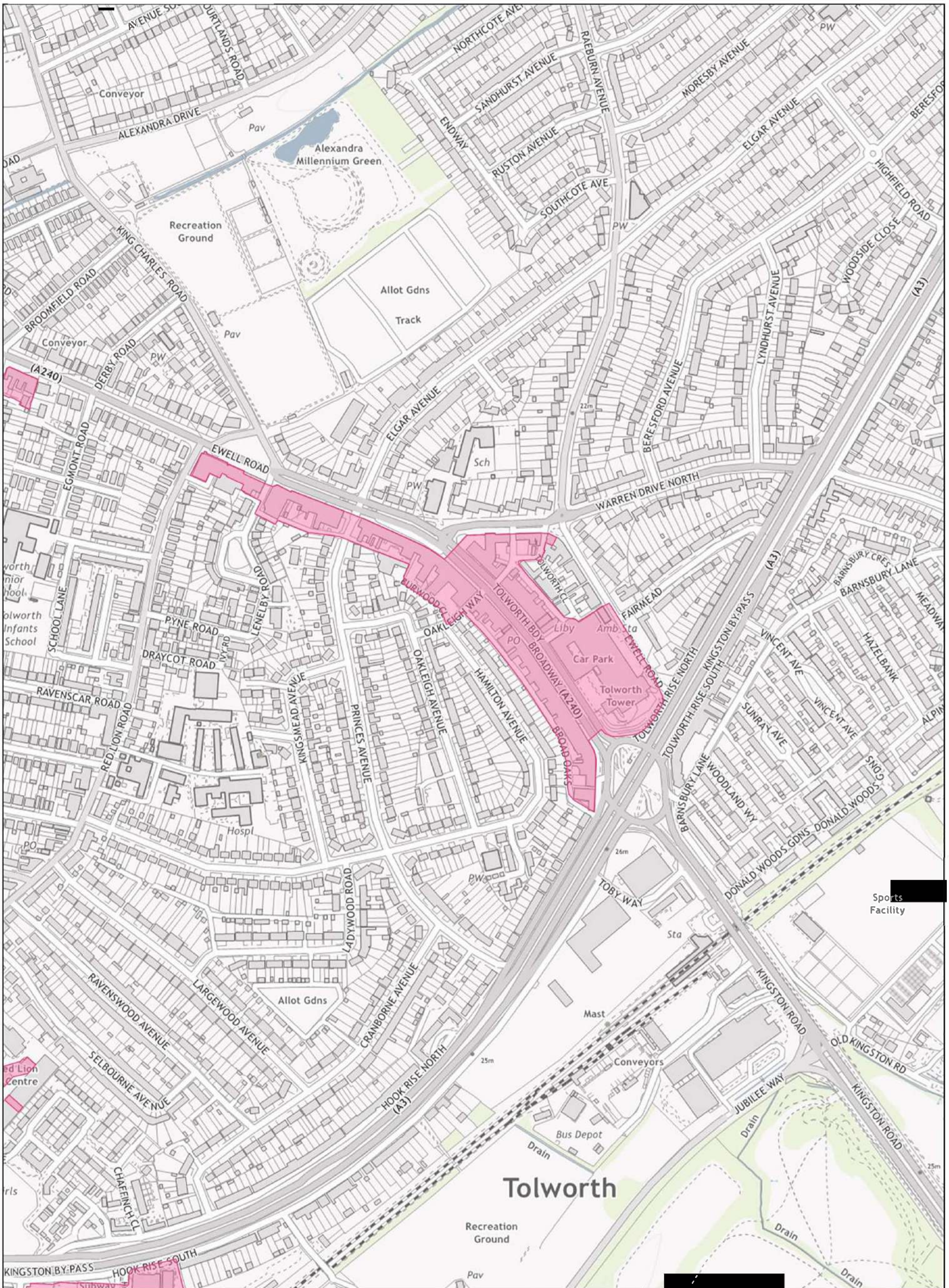
Tolworth District Centre: Article 4 Boundary Plan



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