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Report

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Volume 1 of 3 Spelthorne Town Centres Study 2015: Report

Spelthorne Borough Council

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1. Introduction

- 1.1 In June 2014 GVA was instructed by Spelthorne Borough Council to undertake a comprehensive review of retail and other town centre uses within the Borough's four centres of Staines-upon-Thames (Staines from hereon), Ashford, Shepperton and Sunbury. The draft report was issued for consultation in December 2014, and finalised following this process and consideration of representations in May 2015.
- 1.2 The study will form part of the evidence base which assesses the extent to which the Adopted Development Plan remains relevant and robust, and will provide up-to-date advice on the need and capacity for new retail floorspace across the Borough to 2034. The outputs will help inform the preparation of any future Local Plan, and also assist the Council when making development control decisions.
- 1.3 Our terms of reference are to:
- Review and advise on the performance of the four main centres of Staines, Ashford, Shepperton and Sunbury, identifying any potential deficiencies or 'gaps' in existing provision or underserved markets; and
 - Identify the capacity for new retail provision across the four main centres up to 2034 in accordance with the provisions of the NPPF and in light of potential increases in population and forecast changes in retail expenditure.
 - Assess whether the current provision of other town centre uses in the four main centres is appropriate in terms of scale and nature.
- 1.4 In addition to on-site and desk based evidence gathering, this report is informed by a new and up-to-date Household Telephone Survey covering 1,500 households across thirteen survey zones (See Plan 1). GVA designed the survey questionnaire in consultation with Spelthorne Borough Council and NEMS market research company who undertook the interviewing and data processing in June 2014. In-centre visitor surveys have been undertaken in the four main centres, and are drawn on throughout this study to inform the current positioning and aspirations for the town centres.

Structure

1.5 This report is structured as follows:

- **Section 2** summarises the national, strategic and local planning policies relevant to retail and town centre uses in Spelthorne;
- **Section 3** considers national trends in the retail sector, and in particular the implications of economic fluctuations and technological advances which are impacting on shopping habits;
- **Sections 4 to 7** provide detailed qualitative town centre audits of the retail and town centre offer in the centres of Staines, Ashford, Shepperton and Sunbury Cross, highlighting any key changes since the 2004 Retail Study;
- In **Section 8** we undertake a detailed review of current shopping patterns for convenience and comparison goods, drawing on the results of the up-to-date household telephone survey. We also present our capacity forecasts for additional retail development, taking account of current shopping patterns and the economic climate up to 2034; and
- **Section 9** draws the analysis together and sets out our conclusions and recommendations in respect of the current health and composition of the Borough's main town centres and the need and opportunities for further growth.

2. Policy Framework

2.1 In this section we examine the key features of national and local planning policy guidance which provides the context and framework for this study.

National Policy

The National Planning Policy Framework (March 2012)

2.2 The National Planning Policy Framework (NPPF) was published on 27 March 2012 and sets out the Government's planning policies for England. It replaces the suite of national Planning Policy Statements, Planning Policy Guidance and some Circulars with a single, streamlined document.

2.3 At the heart of the NPPF is a 'presumption in favour of sustainable development', which should be seen as a golden thread running through both plan-making and decision-taking. The NPPF encourages Local Planning Authorities (LPAs) to positively seek opportunities to meet the development needs of their area.

2.4 The NPPF continues to recognise that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each LPA should produce a single Local Plan for its area with any additional DPDs or SPDs to be used only where clearly justified.

2.5 The NPPF maintains the general thrust of PPS4. It 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. In planning for town centres LPAs should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;

- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
 - Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
 - Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
 - Allocate a range of suitable sites to meet the scale and type of economic development needed in town centres. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;
 - Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
 - Recognise that residential development can play an important role in ensuring the vitality of centres; and
 - Where town centres are in decline, plan positively for their future to encourage economic activity.
- 2.6 The NPPF requires Local Plans to be aspirational but realistic. They should address the spatial implications of economic, social and environmental change and set out opportunities for development and clear policies indicating what will or will not be permitted and where.
- 2.7 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia;
- The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
 - The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;

- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

2.8 Consistent with transitional arrangements, the Local Plan will be examined by an independent Inspector whose role it is to assess whether the plan is sound. In order to be found sound the Plan should be:

- **Positively prepared** i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements;
- **Justified** i.e. the most appropriate strategy, when considered against the alternatives;
- **Effective** i.e. deliverable over its plan period and based on effective joint working; and
- **Consistent with national policy** i.e. enable the delivery of sustainable development.

2.9 Overall, the NPPF adopts a positive approach, with a presumption in favour of sustainable development and support for economic growth. In terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise. The NPPF is a material consideration in planning decisions.

Planning Practice Guidance (online)

2.10 On 6 March 2014 the Department for Communities and Local Government (DCLG) launched the online planning practice guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). 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.

2.11 The web-based resource 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. This strategy should be based on the evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. It should consider:

- The appropriate and realistic role, function and hierarchy of town centres in the area over the plan period. This will be informed by audits of existing centres to assess their role, vitality, viability and the potential to accommodate new development. It should cover a three to five year period, but also take the lifetime of the Local Plan into account and be reviewed regularly;
 - The most appropriate mix of uses in the centre to enhance overall vitality and viability;
 - The potential to expand centres or enable new development or redevelopment of under-utilised spaces to accommodate the scale of need identified for main town centre uses. This should involve evaluating different policy options (for example, expanding the market share of a particular centre) or the implications of wider policy such as infrastructure delivery and demographic or economic change;
 - Appropriate timeframes for the provision of new retail floorspace;
 - Complementary strategies that may be necessary or appropriate to enhance the town centre and help deliver the vision for its future; and
 - How car parking provision can be enhanced and both parking charges and enforcement be made proportionate in order to encourage town centre vitality.
- 2.12 The PPG sets out a range of indicators relevant when assessing the health of town centres over time. The town centre audits take account of these performance indicators where the data is available.
- 2.13 When planning for town centres, LPAs should take full account of relevant market signals and keep retail land allocations under regular review. Where it is not possible or appropriate to accommodate identified capacity in town centre locations, LPAs should plan positively to identify the most appropriate alternative strategy for meeting the need for these main town centre uses, having regard to the sequential and impact tests.
- 2.14 When applying the sequential approach in plan-making, LPAs should take into account the need for main town centre uses, the supply and demand for land, and whether there are sites which are suitable, available and viable having regard to the nature of the need that is to be addressed. If the additional main town centre uses cannot be accommodated in town centre sites, the next sequentially preferable sites should be considered. Local Plans should contain policies to apply the sequential test to proposals

for main town centre uses that may come forward outside identified sites or locations allocated in the Local Plan.

Local Policy

Core Strategy and Policies DPD (2009)

2.15 The Core Strategy and Development Control Policies DPD was adopted in February 2009. It forms the Council's spatial plan which sets out the Borough's needs over the plan period and the detailed policies which will determine how those needs will be met. It sets out a vision for the Borough which includes focus on the town centres:

“Staines will have continued to develop its role as a major shopping centre and location for related services meeting the needs of North Surrey. The other centres of Ashford, Shepperton and Sunbury and other local centres and larger parades will have maintained their role in providing local shopping and other services.”

2.16 In order to meet this vision, the document outlines a number of broad objectives, which include: the prevention of further urbanisation; the retention of sufficient and well located employment land; the continued development of Staines for a mix of town centre uses including retail, leisure and employment; and the maintenance of the local service role of Ashford, Shepperton and Sunbury Cross.

2.17 The Core Strategy identifies a need for an additional 32,000 sq m of additional retail floorspace in Staines. The priority location for this is identified as an extension to the Elmsleigh Centre, which designations in the Allocations DPD and a Planning Brief will aim to realise. The Core Strategy states that further need will be met in the long term (post 2016) with the intensification of provision at the Two Rivers retail centre, although this is not identified as a policy allocation. The other town centres in the Borough will be maintained according to their current role. Strategic policy SP4 reinforces this, stating that improved retail and employment provision, and access, will be sought in Staines, and the role of other centres “will be maintained”.

2.18 Policy TC1 seeks to maintain the role of Staines as the principal town centre serving north Surrey through a series of objectives including allocating a further 32,000sqm of retail floorspace, improving accessibility, managing car parking and improving the town centre

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- environment. Policy TC2 concerns the uses within the frontages of Staines town centre. Within the primary frontage, non-A1 uses will not be permitted where this leads to a net loss of retail floorspace.
- 2.19 Policy TC3 deals with development in Ashford, Shepperton and Sunbury Cross town centres. Within defined shopping areas, the loss of A1 uses will be permitted where the proposal is for A2/3/4/5 uses or for a launderette, where no more than 2 out of 9 consecutive units are in non-retail use as a result of the proposal, where the proposal will not harm the predominantly retail character of the centre, and where the proposal will not result in the loss of a prominent retail unit.
- 2.20 Policy TC4 is concerned with other, smaller centres. It states that proposals for the change of use of A1 premises will be permitted where the proposal is for A2/3/4/5 uses or for a launderette. In addition, no more than 4 out of 9 consecutive units should be in non-A1 uses as a result of the proposal, except exceptionally where it can be demonstrated that the loss of the retail unit would not cause long term harm to the viability or vitality of the centre. In redevelopment schemes the total amount of retail floorspace and length of frontage should be maintained. There will be a presumption against the loss of isolated shops that meet a local need.
- 2.21 Policy TC5 generally seeks to direct retail development to Staines town centre or the centres of Ashford, Shepperton or Sunbury Cross if it is of an appropriate scale and character.
- 2.22 Policy SP5 states that the Council will ensure that provision is made for community services and facilities. Existing facilities will be retained or adequate replacement will be provided. Policy CO1 describes this intention in greater detail. It states that the Council will support the provision of new facilities in accessible locations where there is identified need, support the improvement of existing facilities, and resist their loss, except where it is demonstrated that the facility is no longer needed, or that alternative provision can be made in an equally accessible location.

[Allocations DPD \(2009\) and Proposals Map \(2009\)](#)

- 2.23 The Allocations DPD was adopted in December 2009. Its purpose is to allocate land for a range of uses to support the spatial vision and objectives of the Core Strategy.

Allocations are for housing, retail and open space. Relevant allocations for the purposes of this report include A5, A7, A9, and A10:

- Allocation A5 relates to the Steel Works and Builders Merchants, Gresham Road, Staines. It is considered suitable for a high density residential scheme for c 100 flats. The site is situated immediately to the west of Staines rail station.
- Allocation A7 relates to the Builders Merchant, Moor Lane, Staines. An adjoining site has been developed for a mix of housing and flats, and it is proposed that the same mix is built on the allocated site, for c 30 dwellings. The site is situated to the north of the Two Rivers retail centre.
- Allocation A9 relates to 75 residential dwellings and car parking on a prominent site immediately to the west of Staines town centre's western secondary frontage. A high quality design is required, to suit the visually important 'gateway' site.
- Allocation A10 relates to the extension of the Elmsleigh Centre onto adjoining land, Staines. It is proposed that the centre be extended in two phases. The first would be a redevelopment and southern extension for 2,500sqm of retail floorspace, at least 30 flats, and bus station improvements. The second phase would comprise a western extension for at least 18,000sqm of retail floorspace, 65 flats and a mix of related non-retail uses.

2.24 The Proposals Map which accompanies the Site Allocations DPD identifies primary and secondary shopping areas within Staines town centre, and the shopping area boundary within the other centres. In Staines, the primary shopping area comprises all of the pedestrianised section of the High Street, the Elmsleigh Centre and Two Rivers retail centre. The secondary retail frontage includes the High Street to the east of the town centre between the railway line and Kingston Road, and Clarence Street/Church Street to the west of the town centre.

Relevant Government Research

The Portas Review (December 2011)

2.25 In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street, largely in response to the far-reaching effects of the recession on the retail

industry and local high streets in particular. The report, published in December 2011, suggests measures to tackle the further decline of the high street.

2.26 Amongst the 28 separate recommendations set out in the report, there is a call to strengthen policy in favour of 'town centres first'. This followed the publication of the draft NPPF. In summary the recommendations aim to:

- **Run town centres like businesses:** by strengthening the management of high streets through 'Town Teams', developing the BID model and encouraging new markets;
- **Get the basics right:** by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to remove red tape on the high street;
- **Level the playing field:** by ensuring a strong town centre first approach in planning, introduce Secretary of State 'exceptional sign off' for out-of-town development and encouraging large retailers to show their support for high streets by mentoring local businesses;
- **Define landlords' roles/responsibilities:** by looking at disincentives for landlords leaving properties vacant, and empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
- **Give communities greater say:** by including the high street in neighbourhood planning and encouraging innovative community uses of empty high street spaces.

Government Response to Portas Review (March 2012)

2.27 The Government published its formal response to the Portas Review in March 2012, which accepted virtually all of Portas' recommendations. It announced that they will run 24 'Portas Pilot' towns to set up Town Teams to create plans for the future of their high streets. In addition the Government will provide investment to help Business Improvement Districts (BIDs) access loans for their set-up costs and funding for a Future High Street X-Fund to reward towns which are delivering innovative plans to bring their town centres back to life. In its response, the Government also supports a National Market Day in June and has doubled small business rate relief until March 2015. It also supports community involvement in the redesigning of high streets to reinvigorate areas of decline, increase footfall and encourage people to live in their town centres.

2.28 The Government did not support the call to introduce the suggested Secretary of State 'exceptional sign off' for all new out-of-town developments or require all large new developments to have an 'affordable shops' quota. The Government states that LPAs are best placed to understand local needs and 'exceptional sign off' is contrary to the Government's ethos of devolution. As such, the Government will continue to use the call-in power sparingly.

Understanding High Street Performance (December 2011)

2.29 The department for Business, Innovation and Skills (BIS) has also published a report which explores the many factors impacting on the economic and social performance of town centres and high streets. This study is intended to help inform government and local authority decision-making regarding town centres and high streets.

2.30 The study, based on a review of available research and literature on high streets, identifies key issues that the public, private and third sectors need to take into consideration when taking action or investing in high streets. The study identifies a range of factors which have stimulated and affected change on the high street:

- **Externalities** – despite planning policies to protect town centres, high levels of retail and landlord debt and public spending cuts have squeezed consumer spending;
- **Spatial and Physical Factors** – large format stores, accessible by car and where shopping is done under one roof, dominate the market to the detriment of traditional high streets;
- **Market Forces** – the growth in market share of out-of-centre shopping centres, major supermarkets and retail parks in comparison to town centres, demonstrates that consumers are voting with their feet;
- **Management** – high streets are difficult to manage and as a result are disadvantaged compared with supermarkets and shopping centres.

2.31 The study also examines the responses to high street change which have been implemented to date. These include: town centre masterplanning and public realm improvements; differentiation and emphasising a distinctive retail offer; policy prioritisation and more developed place management (e.g. TCM and BIDs).

- 2.32 Moving forwards, the study anticipates that retail performance on the high street will become increasingly challenging. Town centres will continue to be affected by the growth in out-of-centre retail, supermarket non-food sales, and the internet. The high street of the future will need to differentiate itself from shopping centres, as a social space with a range of functions.
- 2.33 The report concludes that the traditional high street faces a number of challenges, not least from the tightening of retail spend and changing consumer behaviour but also from increasing competition posed by the internet and out-of-centre developments. Whilst the future is uncertain, strategies which support the high street are considered more vital.

Summary

- The National Planning Policy Framework (NPPF) was published in March 2012 and replaces the suite of national planning policy statements, including PPS4. The NPPF clearly 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 online Planning Practice Guidance (PPG) was published on 6th March 2014 and provides technical guidance on how to prepare a robust evidence base to ensure the vitality of town centres, including a list of performance indicators relevant when assessing the health and vitality of town centres over time. Where physical capacity is not present in a town centre to meet the level of 'need' identified, local authorities are encouraged to find the most appropriate alternative strategy having regard to the sequential and impact tests.
- The Core Strategy and Policies DPD (2009) seeks the continued development of Staines for a mix of town centre uses including retail, leisure and employment. The document identifies that an extension to the Elmsleigh Centre is a priority location to meet much of the identified need (32,000 sq m). The Core Strategy states that any further need will be met in the long term with the intensification of provision at the Two Rivers retail centre.
- In terms of the smaller town centres of Ashford, Shepperton and Sunbury Cross, the Core Strategy encourages the maintenance of their local service role and envisages no change in the defined retail hierarchy. Specific frontage policies seek to protect

all centres in the Borough against significant loss of A1 uses, ensuring their vitality and viability.

- The Site Allocations DPD (2009) allocates land for a range of uses to support the spatial vision and objectives of the Core Strategy. In particular it designates the Elmsleigh Shopping Centre as the priority site with which to extend the town centre retail offer. The Two Rivers retail centre is not allocated for retail intensification.

3. National Retail Trends

- 3.1 To put our assessment into context and inform our advice on the need for additional retail floorspace in the study area, we have undertaken a review of the current retail market and social trends influencing the retail sector. Our review draws on published data sources, including research by Experian and Verdict.
- 3.2 This section also provides a brief analysis of relevant government research and town centre strategies which have come forward over the last few years, partly in response to the retail trends identified, to promote a consistent policy objective which seeks to strengthen town centres.

Economic Outlook

- 3.3 Advice published by Experian (Retail Planner 11, October 2013) identifies that the UK economy has continued to struggle following the recession as a result of weak domestic demand, declining disposable incomes, low levels of investment and reduced government spending. However, the economic outlook improved in 2013 and Experian expects that as inflation continues to ease steadily, and output and employment growth accelerate, household finances will gradually improve and retail spending growth will increase.
- 3.4 The consensus outlook for the medium term is for annual average GDP growth of about 2.4% over the next five years, which is slightly below the long term trend rate and less buoyant than before the recession. This is primarily due to pressure on government finances, weak bank lending and high household debt. Over the longer term the rate of economic growth is predicted to improve slightly, however due to continuing fiscal restraint this growth is likely to be constrained.

Population Change

- 3.5 The rate of population growth in the UK is accelerating. Between 1971 and 1991 it increased by just over 0.1% pa, whereas over the subsequent 20 years it increased by almost 0.5% pa. Over the next 10 years (2013-23) it is expected to increase by just over 0.7% pa, or 7.5% in total. This population growth will vary between regions over the next 10 years, with London expected to show the strongest growth (+12.5%), followed by the East

and the East Midlands regions (+9.8%). This contrasts with growth of just 3.3% in the North East. Marked disparities can occur between local authorities within the same region, due to differences in housing demand, land availability and local policies.

- 3.6 Advances in healthcare and medicine mean that people are living much longer. It will therefore be increasingly important for Councils to ensure that older consumers are adequately catered for with the right type of facilities in the right locations. The proportion of the population aged over 65 is expected to increase from 17.5% of the total population in 2013 to 19.5% in 10 years' time, a growth rate of 20%, which is more than double the rate of total population growth (7.5%).

Retail Expenditure and Sales Efficiency

Retail Expenditure Growth

- 3.7 Convenience and comparison goods can be defined as follows:
- Convenience Goods: Food products for sale, including beer/wine/spirits;
 - Comparison Goods: Non-food products for sale.
- 3.8 Comparison goods spending is expected to grow at a much higher rate than convenience goods spending over the plan period. For comparison goods, expenditure growth per head was 0.3% in 2011, increasing to 3.1% in 2012 and 3.2% in 2013 according to Experian. Between 2014 and 2023 annual average growth is expected to be around 2.9% pa. For convenience goods, spending declined slightly between 2011 and 2013. However, Experian estimate a return to positive expenditure growth between 2014 and 2023 of around 0.8% pa, falling slightly to 0.7% pa post 2023.
- 3.9 To put these forecasts into historical context, comparison goods growth averaged 4.2% pa over the last 40 years, with stronger growth of 5.2% pa over the last 30 years and 5.6% pa over the last 20 years. Convenience goods growth has been much weaker, averaging 0.4% pa over the last 40 years and 0.3% pa over the last 20 years.

Online Spending

- 3.10 The popularity of online retailing grew rapidly between 2008 and 2012. Most retailers now have an online presence, thus it is expected that this growth will slow. It is, however, likely

to continue outpacing growth in total retail sales each year from 2013 to 2018, rising from £33.7bn to £50.2bn, an overall increase of 49%¹.

- 3.11 Internet spending and other forms of sales which are not derived from physical floorspace need to be taken into account when undertaking retail studies. Special Forms of Trading (SFT) includes all types of non-store retailing (internet, markets and mail order) and in 2013 was equivalent to 11.5% of total retailing (14% for comparison goods and 7% for convenience goods). In 2018, Experian predict that non-store sales will reach 17% of total retail, growing steadily until it plateaus at around 20% by 2026.
- 3.12 Not all of non-store sales reduce the need for physical floorspace (for instance click and collect and the fulfilment of many grocery internet orders through local stores). Therefore, to account for this when calculating the effect of SFT on the need for retail floorspace, Experian recommend adjustments of 10.5% for comparison goods and 2.1% for convenience goods in 2012. These are forecast to rise to 14.5% and 3.8% respectively by 2018².

Sales Efficiency Growth

- 3.13 The sales efficiency growth rate represents the potential ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (e.g. rent, rates and service charges) by increasing average sales density, which is the value of goods sold per annum per sq m of floorspace. Applying a turnover 'efficiency' sales density growth rate is a standard approach used in retail planning studies and has been used in this study in accordance with good practice.
- 3.14 Following the weak or negative overall sales growth during the recession and the growth of online shopping, many retailers have struggled to increase or maintain sales density levels and, together with other financial problems, this has led some retailers into administration. As a result sales density growth is now significantly lower than the high rates seen during the boom of the latter half of the 1990s and first half of the 2000s.
- 3.15 The trend towards the demolition of inefficient stores and the provision of more modern stores with higher and more efficient sales densities is expected to result in less scope to

¹ Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)

² Experian: Retail Planner Briefing Note 11, October 2013

increase comparison goods sales densities in the future. Accordingly, Experian expect an efficiency growth rate for comparison goods of c 2% pa between 2014 and 2030.

- 3.16 Scope for increased sales densities is even more limited for convenience goods because the majority of foodstores already drive high sales efficiencies. An efficiency growth rate of close to zero % pa between 2014 and 2030 is recommended by Experian and these assumptions inform our approach.

Internet Growth & Multichannel Retailing

- 3.17 The online shopping population is reaching saturation, with over 40m online shoppers in the UK expected by 2017. Future growth in the market is likely to come from increased spend driven by new technology and improved delivery options. Changes in technology are driving sales with the expansion of tablet devices which provide a better browsing experience. According to Verdict, in most sectors the average spend per trip is 64.5% higher on a tablet than a laptop/PC³.
- 3.18 Click and collect is forecast to be one of the most significant drivers of growth, with a rise of 62.7% in click and collect purchases expected between 2013 and 2018³. The service provides physical retailers with an important benefit over pure internet operators and creates opportunities for making additional purchases when customers collect orders from stores. The growth in online sales has always had implications for bricks and mortar stores as it potentially reduces the need for so many outlets, but the rise of 'click and collect' is reversing this trend.
- 3.19 The most up-to-date evidence (FSP, October 2014) has been compiled from a survey of 7,000 individuals. The findings highlight that between 2013 and 2014 overall use of click and collect increased by 15%, while the number of those specifying it as their main preference when shopping online almost doubled, up 96%. The survey data showed that Click and Collect shoppers visit shopping centres more often than those who don't use click and collect, with 87% of shoppers likely to visit very frequently (50+ times a year) or frequently (12-50 times a year), thereby having a positive effect on footfall. Evidence confirms that a significant proportion of shoppers make additional purchases after using click and collect elsewhere in the shop/centre.

³ Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)

- 3.20 Physical stores will continue to have a significant role in the multichannel shopping environment, although their size and format will differ from traditional stores. The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom setting, will see a network of key stores remain a fundamental component of retailer's strategies to provide an integrated multichannel retail proposition.

Changing Retailer Requirements

Space Requirements

- 3.21 The retail sector has undergone significant changes over the last decade which has fundamentally altered how, where and when we shop. This has had major implications for retailers' space requirements, which, combined with the recent recession, has changed the retail landscape of our towns and cities.
- 3.22 During the recession retailers' margins were squeezed, whilst other costs have continued to rise and a raft of multiple and independent retailers have either collapsed or significantly shrunk their store portfolios. The decline in the amount of occupied retail space in town centre locations has not typically been offset by new retail developments. Many town centre schemes have been put on hold or significantly scaled down in size, and with 'fairly weak' expenditure growth forecast in the medium term, retailers are expected to remain cautious about store expansion.
- 3.23 The growth of the internet means that retailers no longer need stores in every town to achieve national coverage. Many retailers are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites. The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions.
- 3.24 This polarisation of retailing will result in larger dominant centres continuing to attract key retailers (where space is available), with medium sized centres potentially struggling to attract investment. Local, or neighbourhood, centres should be less affected by this trend and are likely to retain their attraction for top-up and day-to-day shopping. This changing

retail structure needs to be considered carefully when analysing household survey results as it will have implications on how to plan for growth and change.

Out-of-Centre Retailing

- 3.25 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.
- 3.26 Many traditional town centre retailers have developed out-of-town store formats, including John Lewis, who now operate a number of 'At Home' stores in out-of-centre locations, as well as other retailers such as Next, Primark and H&M.

The Role of the Town Centre

- 3.27 The town centre has been the main shopping channel for centuries. However, with weaker expenditure growth and the loss of trade to out-of-centre and online, its future role is set to change dramatically. Emerging trends suggest that many centres will be used increasingly for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces opening in vacant units.
- 3.28 As retailers improve their multichannel offer, the expectation is that town centre stores will be used increasingly as showrooms and to support e-retailing (with click and collect points and safe drop boxes for customers to collect online orders, and in-store kiosks for customers to make online purchases). Towns will need to capitalise on the opportunities that click and collect services offer. Where overall demand for retail floorspace stabilises or declines, it is anticipated that more secondary and tertiary space, which suffers from lower levels of footfall, will increasingly be converted into alternative town centre and residential uses.
- 3.29 Enhancing the non-retail offer so towns function as more than just retail locations will also help drive footfall and increase dwell time. Towns should promote unique attractions such

as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness.

- 3.30 To ensure that town centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. Councils/town centre managers need to gain a better understanding of the catchment and what local people want from their town, to provide the right mix of outlets and services. A vital component of this will be making town centres as accessible as possible, with improved and cheaper car parking.
- 3.31 An important consideration for councils and town centre managers over the next few years will be that many retail leases are due to expire, which will enable retailers to easily exit properties in poorer performing locations. This situation needs to be monitored closely and reinforces the need to improve town centres.
- 3.32 Some of these trends have recently been identified and promoted by the Government in the Portas Review, the Government's Response to the Portas Review and a Government supported industry taskforce report, see Section 2.

Retail Sector Trends

Food and Grocery

- 3.33 The top four supermarkets continue to dominate the market and represent approximately 60% of the total convenience market⁴. With vast store networks and online offers, their coverage is reaching peak levels. Combined with weaker spending on convenience goods and the transfer of trade online, expansion plans are increasingly focused on redevelopment and refurbishment of existing stores rather than on new large hypermarket type stores. In some cases, for example Tesco, space within their larger format stores is being sub-let to restaurants, gyms and children's play centres.
- 3.34 The development of smaller store formats for top up food shopping has become increasingly popular in response to consumers seeking to reduce waste by moving from weekly shops to more frequent smaller shops, or to avoid the high fuel prices associated with travelling long distances. As a result, many of the main operators are expanding their smaller concept stores - Tesco Express, Sainsbury's Local, M Local, Little Waitrose, etc.

⁴ Verdict: Food & Grocery Market Forecasts, December 2013

- 3.35 The value/discount retailers are continuing to expand, having gained considerable market share during the recession. Aldi and Lidl have both succeeded in attracting customers who are looking to trade down in price but not quality, and between 2009 and 2013, Aldi has doubled its market share to 3.2%, whilst Lidl's market share has risen to 2.0%.
- 3.36 Food retailers are also continuing to develop online offers to meet increasing consumer demand for convenient food shopping, much of which is still fulfilled through existing store networks. Click and collect services are expanding into the grocery sector with some retailers developing 'drive-thru' collection points for picking up online orders.

Clothing and Footwear

- 3.37 By 2017, Verdict estimates that the clothing and footwear sector will represent 15.9% of total retail spend (a marginal increase from 15.2% in 2012). The proportion of clothing sales transacted online is currently around 12.4% and is expected to rise to just over 20% by 2017 as browsing services improve.
- 3.38 Low levels of consumer confidence in addition to high prices are expected to keep clothing and footwear sales volumes low. Premium and luxury brands will continue to maintain their consumer appeal, whilst growth from value retailers will become more subdued as they seek to ensure their profitability.

Premium and Luxury Goods

- 3.39 More affluent consumers have been able to maintain a higher level of personal and discretionary spending during the recession and therefore the premium and luxury goods sector has remained relatively strong. There is still high demand for premium brands and goods across all retail sectors, from clothing and accessories to high tech items.
- 3.40 In response to this trend, Verdict predict that the premium sector of the UK department store market (e.g. Harrods and Selfridges) will account for 43% of total department store expenditure in 2017 as midmarket department stores (e.g. John Lewis, House of Fraser and Debenhams) expand designer and luxury goods ranges.

Electricals

- 3.41 The electrical sector has suffered as a result of the recession as households cut back on 'big ticket' items combined with the shift of spending online. Since 2008 the proportion of

electrical spending which takes place online has more than doubled to 43%⁵. Casualties in the sector include Comet and Jessops, along with Best Buy who exited the UK market.

- 3.42 However, growth remains strong for smaller, high tech items such as tablets and premium electrical goods, with retailers such as Apple and John Lewis continuing to do well. There is also demand for 'value' ranges of electrical goods, much of which has been captured by the supermarkets. Over the medium-term at least, sales of big-ticket items are likely to remain subdued.

Homewares

- 3.43 Growth in the more traditional part of the homewares market (such as furniture and floorcoverings) is heavily reliant on the housing market and has been weak in recent years. Growth is expected to remain subdued during 2014, but will improve as the housing market strengthens. The softer end of the homewares market (i.e. smaller more decorative items), has been more resilient as consumers look at cheaper ways to refresh their homes.

Music, Video and Books

- 3.44 Technology is removing the need for physical stores as consumers can now download/stream music and films directly. As a result the music and video sector has shrunk significantly with negative growth in retail spending. Over three quarters (78%) of music and video sales are now online and Verdict predicts that by 2017 online sales will account for 90% of the market⁶.
- 3.45 The book sector has been heavily influenced by the growth of e-reader devices (e.g. Kindle), and the sector is increasingly moving from physical to digital products. By 2018 it is estimated that just fewer than three-quarters of the book market will be online, with almost half of the online market attributed to digital sales.

Leisure Trends

- 3.46 The leisure industry has enjoyed buoyant market conditions over the last decade as a result of growing levels of disposable incomes and low unemployment. Much of the growth has been fuelled by an increase in the number of 'cash-rich, time-poor' consumers

⁵ Verdict: UK Retail Review & Sector Forecasts to 2017

⁶ *Ibid.*

who have been prepared to pay a premium price for convenient services in order to save time. Leisure time has become a precious commodity to consumers and in order to maximise free time, consumers have often combined leisure activities as part of an overall going out experience. The range of leisure choices has also grown considerably leading to an increase in competition in the industry.

- 3.47 The recession brought many challenges for the industry. On one hand, the industry was considered to be particularly exposed to the economic downturn due to the discretionary nature of leisure expenditure, but contrary to this leisure activities have continued to remain an important lifestyle choice for many consumers who will prioritise leisure over other areas of spending.

Cinema

- 3.48 Cinema audiences grew significantly during the 1990s, but by the start of the current decade the growth had slowed and research by Dodona (2009) indicates that the market has reached a plateau.
- 3.49 In 2008, there were 3,610 cinema screens across the UK, of which three-quarters were multiplexes⁷. The remainder are traditional cinemas that have been converted to multi-screen use, large format screens such as IMAX, and screens in mixed-use venues such as arts centres. The dominant operators are Odeon and Cineworld although since the consolidation of the industry in 2005, Vue has undertaken an aggressive building programme to try and increase their market share.
- 3.50 The cinema industry is not immune from recession and there were some closures, the majority being art centre venues rather than high street chains. The economic downturn hit advertising revenues but the industry is now considered to be in good health. Cinema performance has been robust, and in October 2009, The Times⁸ reported that cinemas were experiencing a boom with UK cinema admissions for the first six months of 2009 at their highest levels since 2002. Although ticket prices have been rising, a night at the cinema is considered to represent a relatively cheap night out, especially for families.

⁷ Purpose-built cinema complexes with more than five screens.

⁸ The Times 'Twist in the plot as British cinema defies the recession', October 24th 2009

- 3.51 In recent years, cinema operators have made considerable efforts to improve customer yields by introducing changes such as premium seating areas and enhancing the range of refreshments such as alcohol and higher quality food. Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas as well as regular seats. National Amusements rolled out its 'Cinema de Lux' concept at three shopping malls in 2008, which is a high service concept with allocated leather seating, contemporary dining and concierge facilities.
- 3.52 Another development has been the introduction of 3D films, which are attracting premium ticket prices from operators. In the future, Dodona predict that operators of traditional cinemas, particularly those with only one or two screens, will find their competitive position eroded, especially if family audiences start travelling longer distances to larger cinemas to obtain the latest 3D experience.
- 3.53 Investment in new cinemas is continuing but this is no longer producing such high levels of growth so the focus has switched to replacing or relocating existing cinemas. There is also some investment in under-served areas, however Dodona consider this to be merely offsetting a decline in existing markets. Over the short to medium term, future cinema projects are likely to be impacted by the level of availability of finance for property developers, although it would appear that investment in better seating, better bars and cafés and new buildings is continuing. More recently in the midst of the recession, HMV announced that it was testing a three screen art-house format above its Wimbledon music store.

Bingo

- 3.54 Bingo is one of the oldest forms of gambling in the UK and has traditionally had a downmarket image limiting its appeal as a night out for the majority of the population. The typical bingo player has been perceived as working class, female and from the older demographic. However, over the last decade, the market saw a rise in the number of younger and more affluent players and deregulation allowed clubs to offer bigger prizes.
- 3.55 Nevertheless, more recent research by Mintel highlights that the industry has experienced a fall in revenues and admissions as a result of legislative changes such as the ban on smoking in public places and the rise of online gambling. The recession also hit the market and although operators have attempted to diversify their offer to halt the decline in

participation rates, it would appear that this has merely slowed the decline and operators continue to struggle in continuing tough market conditions.

Ten Pin Bowling

- 3.56 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years, but after a period of growth in the 1980s, decline set in during the early 1990s. Since then, however, a spate of investment in new centres and refurbishments by recognised chain brands has revitalised the industry to a degree and ten pin bowling remains a strong family activity.
- 3.57 Mintel research state that recently, high-end, centralised venues have started to emerge, but the question remains whether this can dispel the lingering sense amongst many that bowling is either passé or too child-, or youth-orientated, whilst offering only basic refreshments. It would appear that it is down to the market and investor confidence to decide, although the concept is already beginning to evolve to generate customer demand. For example, the Bloomsbury Bowl Lanes in Bloomsbury offers a 50s American themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.

Health & Fitness Clubs

- 3.58 According to Mintel's report on Health and Fitness Clubs – UK (May 2003), between 1998 and 2002 the value of the private health and fitness club market increased by 62% at current prices; in real terms the growth was still substantial at 49%. Mintel recognise changes in sporting fashions, which have shifted away from competitive sports towards those focused on personal health and fitness development.
- 3.59 It is now apparent that the health and fitness sector was struggling long before the onset of the current economic downturn, although it is clear that the recession compounded some of the problems faced by the industry such as falling membership rates. The Esporta chain was one of the most high profile casualties and was placed into administration in 2008.
- 3.60 Nevertheless, there is evidence that value and budget operators are entering the health and fitness market and are actively looking to expand their businesses throughout the UK. This new breed of clubs aims to appeal to a wider market with subscriptions typically at

£10 to £20 month. It is apparent that there will be sacrifices to the quality of the offer but that this offer is well suited to financially uncertain times.

Pubs and Clubs

- 3.61 The pub industry suffered in the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. There has been no substantial recovery to date. Other factors such as competition from the supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Many of the large national pub chains have faced difficulties and there have been cases of administration. However, on the plus side, this has meant that smaller multiples have been able to acquire premium sites at bargain prices and value led brands such as JD Wetherspoon have achieved significant sales growth and continue to expand.

Restaurants

- 3.62 It is generally considered that the recession brought mixed fortunes for the restaurant sector. The main casualties appear to have been from the more exclusive end of the market, as well as smaller companies with less established brands. Many companies owning multiple brands have announced stable results and sought to trade through the uncertainties by offering heavy promotions and discounts. The fall in property prices has also provided an opportunity for stronger niche operators to expand their brands as they have been able to negotiate substantial discounts on rents, and landlords have been offering attractive incentive packages to help fill vacant units.
- 3.63 For families in particular, going out for a meal has become too expensive, and many have switched to staying at home with a takeaway which has increased sales for businesses such as Domino's. There has also been a surge in 'all-you-can-eat' style restaurants which are aimed at offering value for money for working class families.

Summary

- Economic growth will continue to remain muted over the plan period, with relatively weak expenditure growth in the short-medium term.
- It is evident that the traditional high street faces a number of challenges, not least from the impacts of the recession, including tightening of retail spending and

changing consumer behaviour, but also from increasing competition posed by the internet, multichannel retailing and out of centre developments.

- In a positive twist, click and collect is forecast to be one of the most significant drivers of growth, with evidence demonstrating that these customers visit centres more frequently, and make additional purchases whilst in the shop/town centre. The phenomenon is driving an increase in footfall in our town centres.
- Even in the context of click and collect, town centre strategies which support the continued evolution of the high street are considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend.
- It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres.
- The on-going pattern of polarisation suggests that larger centres are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services.
- Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure. The mix of uses in a town centre is vital to offer choice to shoppers, and quality restaurants, coffee shops, cafes, bars and other leisure facilities are all important to encourage frequency of visit and longer stay times.

4. Staines Town Centre Audit

- 4.1 Staines is situated south and west of the King George VI and Queen Mary Reservoirs respectively, at the confluence of the River Colne and the River Thames. The centre is situated c. 17 miles west of London in the commuter belt. Both the A308 and the A30 serve the centre, providing access to the M3, and the M25 and A3 respectively. The town centre also features a mainline rail station which provides services to London Waterloo in c 35-40 minutes.
- 4.2 Staines is the largest town in the Borough and performs an important retail and employment role in the sub-region. Retail provision in Staines is focussed on the town centre. The main shopping area is relatively compact and a significant portion is pedestrianised. The High Street provides the main 'spine route' through the town centre, providing a pedestrian link between two sections of the A308, which encircles the southern portion of the centre. The indoor Elmsleigh Shopping Centre is located to the south of the High Street.
- 4.3 Two Rivers retail centre is an open-air development of large retail units to the north of the High Street. Access between the two is given by Tilly's Lane and Norris Road. The centre extends to the north over Mustard Hill Road with access via a pedestrian crossing and small footbridge over the River Colne.
- 4.4 The 2004 study identified Staines as a major centre with a catchment including the whole of Spelthorne and parts of Bedfont, Feltham, Addlestone, Chertsey and Egham. The study identified that Staines had a wide range of multiple retailers, including a number of new retailers as a result of the Two Rivers retail centre development. These include Waitrose, Books Etc., JJB Sports, Carpetright, Furniture World, PC World and Staples.
- 4.5 Vacancies accounted for approximately 8% of total units, which was in line with the average for Surrey at the time. Vacancies at the Elmsleigh Centre were 19% of units, but this was considered to be a temporary impact from the new Two Rivers Retail Park development, and overall an average level of vacancy across the centre was considered healthy given the scale of recent changes. Identified areas for improvement at the centre included enhanced access to the centre by non-car modes, improved environmental quality, and increased residential use in and around the centre. These

aspirations have been incorporated in the Borough policy framework as discussed in Section 2.

4.6 With respect to pedestrian flows, the study found that flows during the construction period for Two Rivers and the pedestrianisation of the High Street had fallen, but had since recovered to around or above their level in 1998, before the works began. There was significantly increased footfall at Norris Road in particular, since it connects the High Street with Two Rivers. The exception to this trend was the western end of the High Street anchored by Debenhams, where flows remained lower. The main entrance to the Elmsleigh Centre remained the busiest point in the centre.

4.7 In terms of capacity for convenience goods, the study concluded that there was scope for a modest increase in floorspace within the primary catchment area, c 787sqm. More speculatively, the study estimated capacity for c 1,400sqm of additional floorspace to 2016. For comparison goods, the study states that there is clearly sufficient scope to support the then local plan allocation of 9,000sqm at Phase 3 of the Elmsleigh Centre, and it was recommended that an increased allocation of c 17,000sqm be considered in order to try and improve the market share of Staines.

4.8 The remainder of this section will consider a range of indicators specified in the PPG where information is available. The health check for Staines will be principally informed by, *inter alia*:

- The most recent Experian Goad Summary Report for Staines (April 2013);
- Our own audit of Staines town centre (July 2014);
- The results of a bespoke household telephone survey (June 2014) and an on-street visitor survey (June 2014), both undertaken by NEMS;
- Relevant policy documents;
- Co-Star Focus Report of existing retailer requirements for Staines town centre (July 2014);
- Analysis of CoStar Suite property records (December 2014);
- PROMIS Staines Retail Report (December 2014);
- Discussions with key stakeholders; and
- Relevant planning applications and permissions.

Diversity of Uses

4.9 Based on the latest survey undertaken by Experian Goad (July 2014), the town centre currently comprises 68,095 sq m gross retail and service floorspace across 226 occupied units. Tables 4.1 and 4.2 below set out the diversity of retail and service units in Staines centre compared to the national average.

Table 4.1: Staines Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	9	3.98	8.80	-4.82
Comparison	110	48.67	40.95	+7.72
Service	85	37.61	36.46	+1.15
Vacant	18	7.96	12.63	-4.67
Misc.	4	1.77	1.15	+0.62
Total	226	100	100	-

Table 4.2: Staines Composition of Uses (Floorspace sqm gross)

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	5,629	8.27	17.78	-9.51
Comparison	42,827	62.89	46.05	+16.84
Service	15,700	23.06	24.44	-1.38
Vacant	3,679	5.40	10.70	-5.3
Misc.	260	0.38	1.03	-0.65
Total	68,095	100	100	-

Source: Experian Goad Summary Report (April 2013). Figures may not sum due to rounding.

4.10 In terms of comparison goods floorspace, the Goad survey excludes some upper floors and mezzanine floorspace sales areas. GVA have therefore incorporated amendments to this baseline floorspace output to include these key variables. For the purposes of identifying the quantitative performance of the centre in later sections, the total net sales area has been calculated at 64,664 sq m net (c.92,377 sq m gross). This includes all

trading levels in Debenhams, M&S, Waterstones, Topshop, and JD Sports, and also mezzanine floor areas in Furniture Village, TK Maxx, Hobbycraft, The Entertainer, and Currys PC World.

- 4.11 Convenience goods provision in Staines is below the national average, accounting for only 3.98% of total units (compared to the national average of 8.8%) and 8.27% of total floorspace (compared to the national average of 17.8%). The main, large format foodstore in Staines is the Waitrose at the Two Rivers retail centre. The store is located at the northern end of the allocated Primary Shopping Area. The store includes a delicatessen, bakery, butchers and a fishmonger. It is served by the Two Rivers car park which provides 1,033 spaces.
- 4.12 There are a number of smaller convenience stores dispersed throughout the town centre which help to contribute to its vitality, and form an important role in supporting convenience provision within Staines. Based on the Experian evidence, however, the number and range is not as extensive as in comparable town centres across the UK. Staines also has an edge-of-centre Sainsbury's foodstore located on 'The Causeway', and whilst contributing to the wider retail offer in the town centre, it is actually located in the adjacent Runnymede district.
- 4.13 In terms of comparison goods, the number of units and proportion of floorspace in the centre is considerably above the national average. A more detailed review of the specific sub-categories of comparison goods⁹ identifies that Staines continues to have an above average representation of clothing and footwear units (which account for circa 14.16% of total units in the town centre compared to the national average of 10.4%). According to the Goad report, the town centre also has above average provision of furniture, carpets and textile goods (which account for 7.08% compared to the national average of 3.39%) and also of electrical and home entertainment goods (which account for 5.3% of units compared to the national average of 3.8%).
- 4.14 The provision of service units and floorspace within Staines is generally in line with the national average. Service units are sub-divided into three categories by Experian Goad;

⁹ Sub-categories of comparison goods include: footwear and repairs; men's and boys' wear; women's, girls' and children's wear; mixed and general clothing; furniture, carpets and textiles; books, arts, crafts, stationers and copying; electrical, home entertainment, telephones and video; DIY, hardware and household goods; gifts, china, glass and leather goods; cars, motorcycles and accessories; chemists, toiletries and opticians; variety, department and catalogue showrooms; florists and gardens; sports, toys, cycles and hobbies; jewellers, clocks and repairs; charity, pets and other comparison.

Retail, Leisure and Financial and Business Services. All three sectors are in line with the national average, and there are no clearly identified uses that should be strengthened based on this indicator alone. We investigate the need for this type of town centre use further in this report.

Retailer Representation

- 4.15 In terms of convenience goods, Waitrose is the key anchor retailer in the Two Rivers shopping scheme. The store is connected to the High Street, and Elmsleigh Shopping Centre beyond, by Norris Road and Tilly's Lane, both well-maintained and well-used pedestrian routes linking the store to the rest of the town centre. Elsewhere in the town centre, M&S has a convenience goods offer, but the range of smaller, independent convenience goods operators is limited. There is a twice weekly market in Staines selling a range of goods including food products, although it was not widely mentioned in the results of the household telephone survey.
- 4.16 The majority of Staines' comparison retail provision is located in the town centre along the High Street and within the Two Rivers retail centre to the north and the Elmsleigh Shopping Centre to the south (both located within the town centre Primary Shopping Area). The High Street is the central point of retailing activity in the town centre, being located between Two Rivers and Elmsleigh. Key comparison retailers on the High Street include BHS, H&M, Debenhams, Marks & Spencer, Next, WHSmith, Waterstones, Gap, Superdrug, and Boots.
- 4.17 Two Rivers is an open air shopping 'centre', occupied by retailers including Furniture Village, TK Maxx, Carpetright, Hobbycraft, Next, Boots, The Entertainer, JD Sports, HMV, Pizza Hut, Nandos, Sports Direct, Mamas & Papas, Laura Ashley and Maplin. The previously occupied Tesco Home Plus will shortly be occupied by Next Home. The centre provides 1,033 surface level parking spaces. The Elmsleigh Shopping Centre is an enclosed shopping mall type development, occupied by retailers including Matalan, Bhs, Argos, New Look, River Island, Top Shop, Rush, Holland and Barrett, Mothercare, Clarks and Clintons. There are two car parks offering c1,300 parking spaces.
- 4.18 Retail units are older and smaller in size on the High Street and in the Elmsleigh Shopping Centre compared to the newer Two Rivers scheme. The comparison retail offer in Staines is predominately tailored towards the mid/mass market and there is a notable gap in the

provision of more luxury and aspirational retailers. This may be due to their tendency to seek representation in larger regional centres alongside a 'cluster' of similar operators, but a centre the size of Staines should aspire to attract more niche/aspirational retailers in order to compete and enhance its catchment profile.

4.19 GVA commissioned an in-centre 'Visitors Survey', which was carried out in June 2014. The results provide an indication of the relative popularity of various retailers in the centre, and Table 4.3 below sets out the top 10 stores which were mentioned by respondents when asked what main stores they were intending to visit in Staines. It is evident that the M&S on High Street/Elmsleigh Shopping Centre is the most popular attraction in terms of retail floorspace in Staines town centre, closely followed by Waitrose at Two Rivers. This demonstrates strong anchors in two different parts of the centre (north and east). Debenhams, which anchors the western end of the High Street, was only cited by 14% of respondents, demonstrating the weaker attraction in that part of the town centre.

Table 4.3: Top 10 frequented retail destinations in Staines

	Location	% Respondents who identified each store when asked what stores they were intending on visiting
Marks & Spencer	High Street/Elmsleigh Shopping Centre	32%
Waitrose	Two Rivers Retail Centre	29%
Boots	unspecified	16%
BHS	Elmsleigh Shopping Centre	16%
H&M	Elmsleigh Shopping Centre	15%
Other	unspecified	15%
Debenhams	High Street	14%
WHSmith	High Street	13%
TK Maxx	Two Rivers Retail Centre	13%
Tesco Homeplay	Two Rivers Retail Centre	7%

Source: Staines On-Street Survey, June 2014

4.20 There is a reasonable range of eating and drinking operators in Staines town centre. These include a range of Indian, Chinese and Korean restaurants to the east of the railway line on the High Street; and pubs and restaurants on Clarence Street, including

Wetherspoons, Pizza Express, The Slug & Lettuce, Roshini's, Jimmy Spices, Mamma Mia and Forest & Ocean. These are both more secondary retail areas. The Two Rivers provides larger box units occupied by Spur American Restaurant, Pizza Hut, Nandos, Ask, and Frankie & Bennys. Operators on the High Street include the Harvester, Baroosh Bar, Subway, McDonalds, Caffè Nero, and Starbucks.

Other Main town centre Uses

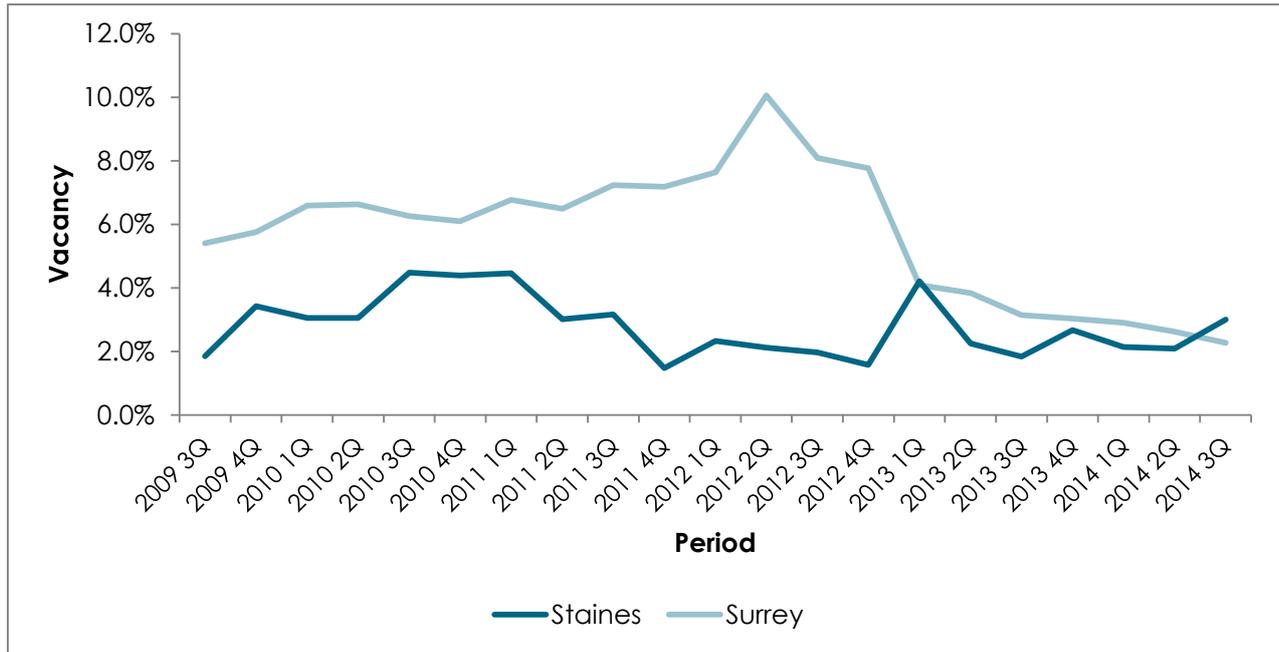
- 4.21 Staines has a number of other main town uses. These include the Vue Cinema at Two Rivers, the Spelthorne Museum south of the Elmsleigh Shopping Centre, and the Virgin Active gym and swimming pool at Two Rivers retail centre. Outside of the town centre, but still easily accessible, are the Spelthorne Leisure Centre and the Thames Club. Spelthorne Leisure Centre includes a 100+ station gym, sports hall, swimming pool, squash courts, crèche and fitness studios. The Thames Club is a private fitness club and spa, featuring an equipped gym, studios including classes, a pool, and conference and meeting rooms.
- 4.22 Staines town centre also has a number of other uses including a community centre, the Mercure Hotel and Travelodge and Staines Library. Within walking distance of the centre are the Spelthorne Borough Council Offices, Staines County Court and Knowle Green Medical Centre. The centre also features the River Thames, much of which is walkable with a riverside path that links residential and leisure uses. These facilities all contribute to the diversity of the centre and help encourage activity and footfall throughout the day and evening.

Vacancies

- 4.23 The most recent Experian Goad Summary Report (April 2013) identified 18 vacancies, representing 7.96% of units, which is significantly below the national average of 12.63%. This is not dissimilar to the results of the Spelthorne Retail Study 2004, which identified 22 vacancies (8% of units). The vacancy rate in the centre appears to have remained relatively constant over the last 10 years, and consistently below average.
- 4.24 Figure 4.1 below illustrates the change in vacancy rate for Staines over time, compared to the average for Surrey, based on historic data for properties within the CoStar Suite system. These are different from those recorded within Experian GOAD, and are therefore

not directly comparable, but they usefully demonstrate the performance of Staines relative to Surrey, and over time. The figure demonstrates that Staines has consistently had a lower vacancy rate than in the wider region, until the most recent period of Q3 2014. The vacancy rate in Staines has also remained relatively consistent throughout the recession. This demonstrates strong performance and resilience.

Figure 4.1: Vacancy Rate in Staines and Surrey 2009-2014



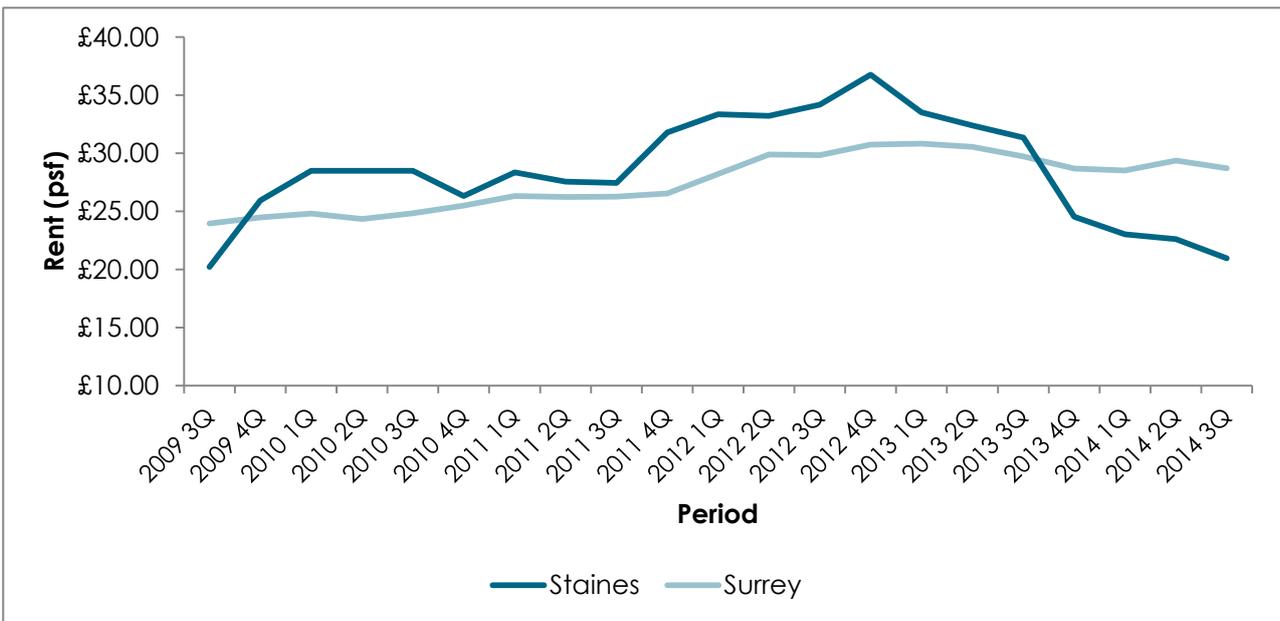
4.25 There are no specific problem areas or clusters of vacant units in Staines, aside from a concentration at the eastern end of the High Street. We understand that these units are occupied by one freeholder who has longer term plans for refurbishment/redevelopment and is not therefore identified as a concern/weakness.

4.26 Low vacancy levels in a centre may be symptomatic of under provision of space, often restricting new and existing retailers in the centre from securing new or enhanced representation. The Two Rivers development has demonstrated the ability of Staines to attract good quality retailers to larger box units, and it is likely that further well developed reconfiguration/redevelopment schemes, providing modern space, would let to existing town centre operators and those new to Staines.

Commercial Rents and Yields

- 4.27 According to PROMIS (October 2014)¹⁰ prime retail rents in Staines were c £90 psf Zone A in mid-2014. This has remained unchanged from Q4 2013, and is 25% below the pre-recession peak of £120 psf Zone A in 2004-2009.
- 4.28 Analysis of CoStar Suite properties provides detail on average rents, as shown by Figure 4.2 below. At Q3 2014 average retail rents in Staines town centre were c £21 psf. Over the last 5 years rents in Staines have remained relatively buoyant, including throughout the recession. Rents have dropped over the last year, though this may be reflective of more peripheral units being let as the retail market nationally has recovered thereby reducing the overall average.

Figure 4.2: Average Rents in Staines and Surrey 2009-2014



- 4.29 When compared to rents in Surrey as a whole, Staines has performed well through the recession but has declined relatively over the last year. This means that Staines is competitive in the region as a place for retailers to locate, but may also indicate that demand has fallen in recent months.

¹⁰ Staines Retail Report, 10 December 2014, Property Market Analysis LLP

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- 4.30 PROMIS (October 2014) find that prime yields in Staines in mid-2014 were 7%, which is a reduction of 0.25% over the last 6 months. This reflects the fall in rents but may also indicate an improvement in investor sentiment as the retail environment improves following the recession. However, prime yields remain 2.25% above the pre-recession peak of 4.75% achieved in late 2006. CoStar transaction data suggests that average yields are closer to 8%, and that this has remained steady over the last year. Overall, investor confidence in Staines remains steady, though does not appear to be returning to pre-recession levels in the near future. This is consistent with the national average.

Accessibility

- 4.31 Staines town centre has excellent access to the main road network, being in close proximity to the M3, M25, A308 and A30, with links to Farnborough, Southampton, London and the major UK road networks. The mainline rail station is outside the town centre with regular services to London Waterloo (35-40 minutes), or to Windsor and Reading in the opposite direction. The station is situated off Kingston Road, a short walk from the main shopping area. The town centre bus station is in the south of the centre to the rear of the Elmsleigh Shopping Centre. It lies within the Core Strategy allocated development site (A10).
- 4.32 There are a number of car parks in Staines, the main ones being the car parking at Two Rivers retail centre, the town centre car park on Bridge Street and the two car parks within the Elmsleigh Shopping Centre. At the time of our town centre visit the Two Rivers car park was almost at full capacity; charges are £1.00 for up to 1 hour, £2.00 for 1-2 hours, £2.50 for 2-3 hours and £3.50 for 3-4 hours. Parking is free after 6pm and is £2.00 all day on Sundays.
- 4.33 The Elmsleigh Shopping Centre car parks have capacity for around 1,300 cars, and operate similar pricing thresholds to the Two Rivers. The Bridge Street car park appears to be a less popular car park and is allocated for residential redevelopment in the Spelthorne Core Strategy and Proposals DPD. It has previously received a resolution to grant consent for a 143 unit scheme, and is being actively marketed by the Council.

Pedestrian Flows

- 4.34 Pedestrian flow data has been provided by the Council for the period between 1998 and 2009. There has been no development or major change in the centre since this time and

we believe this remains a good representation of footfall movement around the centre today.

4.35 Measurements were taken over 3 days in May and/or June each year, and in all cases, results were recorded on two weekdays and one Saturday. Below we present the total pedestrian count over the 3 days at each of the monitoring points in the period 2001-2009, and are listed in descending order.

Table 4.4: Pedestrian movement counts in Staines, 2001-2009

Monitoring Point	Pedestrian Counts		
	2001	2005	2009
Elmsleigh Centre – High Street Entrance	44,928	50,244	56,316
Norris Road South	45,144	51,960	51,756
High Street – Debenhams/ Nationwide	42,468	42,912	38,880
High Street – Marks & Spencer	23,088	28,656	26,640
Elmsleigh Centre – bus station entrance	20,328	22,404	24,012
Tilly’s Lane*	-	18,312	16,752
Two Rivers – footbridge over River Colne	9,396	13,608	15,648
Ironbridge – both sides	16,260	18,096	12,492
Thames Street – south of Debenhams	12,648	9,660	8,796
Clarence Street – outside Forest & Ocean	13,884	10,560	8,736
Church Street – west of The George	5,184	4,908	6,036
Church Street – Two Rivers footbridge*	-	2,784	2,772
TOTAL	-	274,104	268,836

Source: Spelthorne Borough Council

*N.B. No monitoring undertaken at these points prior to 2002.

4.36 Counts are consistently higher within the primary shopping area in the centre of the town (Norris Street, High Street, Elmsleigh Centre), and lower in the secondary shopping area to the west (Clarence Street, Church Street, Iron Bridge). The highest counts were recorded outside the Elmsleigh Shopping Centre entrance, on the High Street, whilst the second highest counts were taken on Norris Road, which links to Two Rivers. This demonstrates the

strength of Two Rivers and adjoining car park as a destination, and the development's success which has clearly led to strong footfall linkages with the remainder of the town centre.

Out of Centre Retailing

- 4.37 There are several out-of-centre retail destinations in or around Spelthorne Borough. In terms of non-food, these include retail warehouses currently occupied by Halfords and Homebase on The Causeway, to the west of the town centre in Runnymede authority area.
- 4.38 There are two main out of centre foodstores. The Tesco store, Ashford Hospital, is located to the north east of Staines town centre on Town Lane. The store has a floorspace of 3,973 sq m (net), of which we estimate 75% is used for the sale of convenience goods. The store is open 24 hours and has a comprehensive food offer including a bakery, butcher, fish monger and a hot deli counter. Additional facilities include a pharmacy, café/restaurant, petrol filling station, a Timpson's watch and shoe repair shop, a car wash and a phone shop. The store also sells a range of non-food goods including clothing and electrical goods.
- 4.39 The Tesco store at Sunbury Cross is linked to Sunbury Cross town centre via a pedestrian footbridge to the south of the Sunbury Cross Shopping Centre. This store offers a wide range of both convenience and comparison goods, with floorspace divided approximately equally between the two, including an internal mezzanine. The convenience offer includes takeaway and deli counters, and a butcher, fishmonger and bakery. Other facilities at the store include a car wash, a Harris + Hoole café, a petrol filling station, and a Timpsons kiosk. Whilst the store is open 24 hours a day during the week, there was little evidence of linked trips between this store and Sunbury Cross centre.
- 4.40 There is a Sainsbury's foodstore on the edge of Staines town centre on the Causeway, which is located in Runnymede district. We estimate from an initial view that approximately 80% is used for the sale of convenience goods. The store has a comprehensive food offer, including a butchers, fresh salad bar, fish mongers, hot deli and a cheese counter. It also has a limited non-food retail offer, including ladies wear, greetings cards, CDs and DVDs and cookware. Additional facilities include a petrol filling station, car wash, Johnsons Dry Cleaners, a Starbucks and travel money counter.

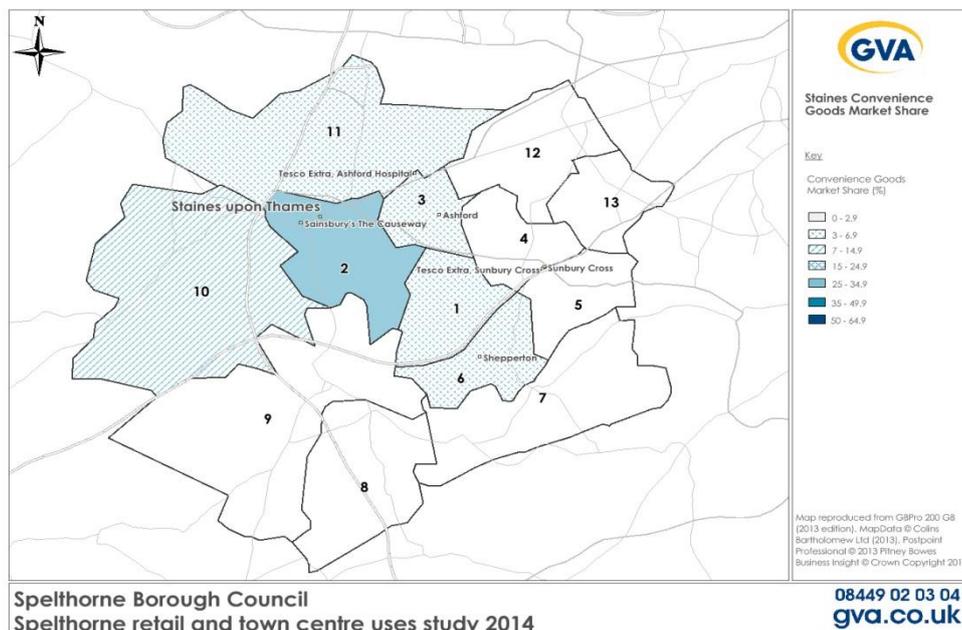
Shopping Patterns

4.41 The telephone survey undertaken in June 2014 identified local shopping patterns across the survey area, including Zone 2, the zone in which Staines is located. Analysis of these shopping patterns provides an overview of the current role and function of Staines as a shopping destination.

Convenience Goods

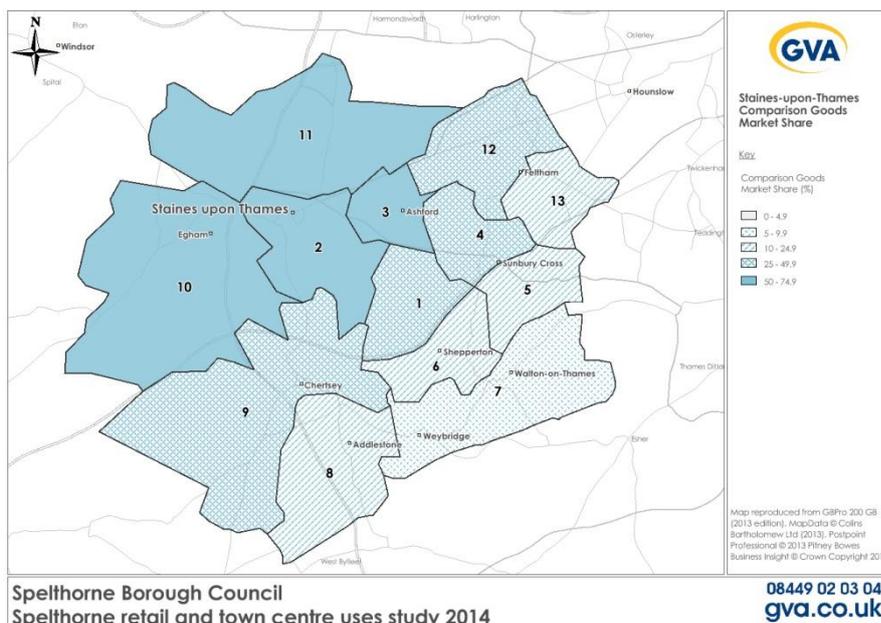
4.42 The foodstore most visited in Staines town centre, by those living in Zone 2, is the Waitrose at Two Rivers (19.5%), followed by the M&S foodstore in the Elmsleigh Shopping Centre (4.3%). The most popular out of centre shopping destinations cited by respondents living in Zone 2 are Tesco Extra, Sunbury Cross (16.2%); Tesco Extra, Ashford (16.2%); and Sainsbury's, The Causeway (16.9%). The town centre has a combined Zone 2 market share of 32.6%, compared to an out-of-centre combined market share of 44%.

4.43 The plan below (Plan 5a in Plans and Appendices) illustrates the market share of foodstores in Staines town centre. It is evident from our analysis that the Waitrose and M&S are strong attractors, but achieve only a 32.6% market share in the context of a strong out-of-centre foodstore offer. There is a clear opportunity for Staines town centre to enhance its convenience goods market share over the forthcoming plan period.



Comparison Goods

4.44 Staines performs a particularly strong comparison goods shopping role in the wider sub-region. Within Zone 2, Staines town centre draws 74% of comparison goods expenditure. The Plan below (Plan 4a in Plans and Appendices) illustrates that Staines has a strong trade draw from every survey zone, ranging from 64.5% in Zone 10 to 9.1% in Zone 7.



4.45 Respondents within Zone 2 also chose to undertake their comparison goods shopping in Kingston (6.1%), but no additional major competing destinations were identified.

4.46 The results of the household telephone survey indicate that across the survey area, Staines is identified as the place that the majority of people (48.8%) normally go to undertake their clothing, footwear and fashion shopping. Staines primarily competes with Kingston for this goods type. Staines attracts 39.9% of shoppers for furniture, floor coverings and household textiles, again primarily competing with Kingston.

4.47 For DIY shopping, respondents cited the Apex Retail Park in Hanworth as a top destination, closely followed by Staines and Walton; and for domestic appliances respondents cited Staines with a large proportion specifically mentioning the Two Rivers shopping centre. Kingston, the Apex Retail Park and the Paddock Retail Park in Weybridge also had strong responses. Staines town centre was the top response for personal/toiletries and luxury

items. The results demonstrate the strength of Staines town centre for all goods types, supported by the offer at the Two Rivers shopping centre.

Leisure & Entertainment Destinations / Travel Patterns

4.48 The Household Telephone Survey results enable us to undertake a qualitative review of existing commercial leisure provision within the Borough, enabling us to provide commentary and recommendations on the extent of the need for additional leisure floorspace. We draw on national trends (Section 3), town centre audits, site visits, mapping, desk based gap analysis, and the Household Telephone Surveys; and Plan 6 illustrates the geographical location of key leisure venues with drive time analysis. The findings from this analysis are set out below:

- The Borough has one cinema; the Vue Cinema at Two Rivers Retail Park in Staines town centre. It is evident from the results of the household telephone survey that it is the most popular cinema in the wider catchment area, capturing 61.9% of all cinema trips. Other popular destinations include the Cineworld Cinema, Air Park Way (17.5%); Everyman Cinema, High Street, Walton-on-Thames (5.8%); Ambassadors Cinema, Woking (5.3%); and the Odeon Cinema, High Street, Esher (2.7%).
- Spelthorne does not have a ten pin bowling destination, and the catchment are instead visiting Leisure West Complex, Feltham (65%); Airport Bowl, Harlington (9.3%); Big Apple Bowling, Church Street, Woking (8.8%); and Hollywood Bowl, Bracknell (3.7%).
- Given the vast number of gyms/health and fitness clubs it is more difficult to be specific about trip patterns, but the household survey results do give an indication of popularity. The most frequently cited response is the Spelthorne Leisure Centre, Knowle Green, Staines (16.6%); followed by The River Bourne Club (8.2%), The Thames Club (7.7%), Hanworth Air Park Leisure Centre, Uxbridge Road (6.5%), and Virgin Active, Two Rivers, Staines (3.1%).
- The substantial number of different swimming activities/travel patterns is similar to gyms given the number of destinations. The most popular destinations in Spelthorne include the Thames Club, Wheatsheaf, Staines (10.1%); Spelthorne Leisure Centre, Knowle Green (9.7%); and Virgin Active, Two Rivers, Staines (4.8%). Outside the Borough, the most frequently cited destinations include The River Bourne Club, Chertsey (12.2%);

Hanworth Air Park Leisure Centre, Hanworth (12%); The Elmbridge Xcel Leisure Complex, Walton-on-Thames (11.2%), and Sunbury Leisure Centre, Sunbury (9%).

- A number of centres were cited as favoured locations for evening pubs and clubs. These include Staines (20%), Chertsey (8%), Walton (7.4%), Kingston (4.7%), Egham (4.5%), Ashford (3.7%), Shepperton (3.8%), and Sunbury (4.1%).
- The household telephone survey also demonstrated the reasonable strength of Staines for restaurants, 25.4% across the survey area and 66.5% within core zone 2. Centres elsewhere in Spelthorne have varying degrees of popularity, with Ashford being cited by 3.2% of respondents across the survey area, and 13.3% of those living in core Zone 3. Shepperton has a stronger performance in core Zone 6, attracting 37.5% of respondents; whilst Sunbury attracts 41.6% in core Zone 5.
- There are few bingo destinations in the catchment area, and the household survey results identify only the Gala Bingo at the Leisure West Complex on Air Park Way (89.7%). Likewise, there are few cited theatre destinations, with the most popular being identified as Central London/West End (42.6%); followed by the New Victoria Theatre, Woking (26.6%); and the Theatre Royal Windsor (7.4%).
- The most popular destinations for ice-skating activities include the Guildford Spectrum (44.7%), Absolutely Ice, Slough Arena (13.6%), and Peak Fitness, Bracknell (11.2%).

Customer Views and Behaviour

4.49 The Household Telephone Survey asked respondents about their likes and dislikes, and how they think Staines town centre could be improved. The key findings are summarised below:

- When asked what they liked about Staines town centre, the top responses included 'close to home' (27%), the 'good range of chain/well known stores' (15.2%), the 'good range of non-food shops' (14%), and 'easy/good parking' (10.4%);
- In terms of dislikes, respondents mentioned the cost of parking (9.1%) and the lack of surface parking (7%). This is likely to reflect the popularity of the Two Rivers surface car park and perceptions about limited capacity. The other top response included the range of shops/clothes shops (10.4%);

- When asked what they would like to see improved in Staines town centre, 37% stated that there was no need to improve the centre. Three topics identified by a number of respondents included choice, parking and the environment. A better choice of shops, better quality shops and more large shops/a department store was cited by 16.1% of respondents. In terms of parking, shoppers want more parking and cheaper/free parking (14.3%); whilst 5.7% want to see better maintenance and cleanliness.

4.50 A more in-depth visitor survey was undertaken in Staines town centre, and we summarise the key findings below:

- The main purpose for visiting Staines town centre was for non-food shopping (38%), followed by food shopping (13%), meeting friend/socialising (10.1%) and financial services (5.8%). 10.9% of respondents worked in Staines town centre;
- When asked what else they would be doing in Staines town centre a number of linked trips were identified, including food shopping (19.6%), going to a café/restaurant (18.1%), non-food shopping (18.1%), general browsing/window shopping (6.2%), going to the market (5.4%), and financial services (5.1%);
- A number of key attractors were identified when respondents were asked what main stores they were intending on visiting. The range included Waitrose (29.1%), M&S (32.2%), Boots (16.1%), H&M (14.6%), and Debenhams (13.6%). The figures demonstrate that Staines does not rely on one particular retailer, although Waitrose and M&S are identified as the key/top attractors;
- In terms of mode of transport, 57.2% of visitors arrived by car, followed by 'on-foot' (19.6%) and bus (15.6%). Only 3.6% arrived by train, and 2.5% cycled. When asked how long their journey took, 17.4% of respondents cited 0-5 minutes, whilst 57.3% cited 6-20 minutes; 25.3% took over 21 minutes. 86.2% of people travelled from home, 4.7% travelled from work, and 5.4% started their journey at a friend/relatives house;
- When asked how long they intended to stay in the centre, 15.1% stated less than 45 minutes, whilst 59.4% stated between 45 minutes and 2.5 hours. 25.5% thought they would be staying in the centre for between 2.5 hours and all day, which reflects the range and choice of shopping and town centre activity on offer;

- Respondents were asked how often they visited the centre. Responses included daily (8.3%), 2-6 times a week (38.8%), weekly (18.1%), fortnightly (13.4%) and monthly (9.1%). These figures are positive for Staines town centre, suggesting a loyal customer base who visits the town centre frequently.

4.51 The survey results identify a town centre performing well, with a number of key attractors and a good range of town centre attractions. This ensures frequent visits from a loyal customer base that choose to stay in the centre for reasonably lengthy periods of time. Linked trips between these different attractions have been identified. Areas for improvement are primarily focused on aspiring to a better range/quality of shops.

Development Sites

4.52 The Spelthorne Allocations DPD (2009) identifies four development site opportunities in and around Staines town centre. These sites have been described in Section 2, and the only allocation to include retail is the extension and refurbishment of the Elmsleigh Centre (Allocation A10). Evidence and policy confirms that over the two remaining phases of the project, 20,500sqm of retail floorspace could be delivered, and policy encourages the delivery of improvements to the Bus Station.

4.53 At the time of our visit, we identified a number of other sites with the potential to deliver retail floorspace, which are reflected in existing planning permissions for three of the sites. These included:

- **25-27 Clarence Street.** This is a Grade II listed 2-storey building situated within the western designated secondary frontage of Staines centre, adjacent to the Interskin Studios tattoo parlour. The building appears to be in a derelict state, and occupies a prominent site adjacent to the Clarence Street bridge over the River Colne. A full planning application (ref: 07/01170/FUL) for demolition and construction of a 4-storey building comprising A2 use and 5 flats, was submitted in November 2011. The officer's report recommended conditional approval but no determination appears to have been made.
- **Former Majestic House Site,** north of High Street and between Fairfield Avenue and Mill Mead. This site is located within the eastern area of designated secondary frontage, opposite Lewis furniture store. It is currently vacant. On 15 February 2011 outline

permission was given at appeal for a total of 39,750sqm GEA of development, comprising A1-5, B1(a), C1, C3 and D2 uses. This permission has not been implemented.

- **17-51 London Road.** This site is located outside any designated frontage, but is nevertheless within the designated Employment Area of Staines town centre. It is situated on London Road, to the east of the centre, and was vacant and cleared at the time of our visit. An outline application for either offices, or offices and a hotel, both with ground floor A1/A3, was granted in July 2007. Reserved matters have subsequently been granted in October 2007 and October 2013. Full applications for a standalone 2-storey A3 building, and for a 6,700sqm hotel and 10,970sqm office with ground floor A1/A3 uses and a public piazza, were also approved in October 2007 and March 2008 respectively. These options have not yet been implemented and the site remains vacant.
- **90-108 (evens) High Street.** At the time of our visit this was the only location in Staines centre with a concentration of vacant units. Of the 9 units in the row, 7 are vacant and many appeared to be in a state of substantial disrepair. We understand that all these units are within a single freehold ownership, and that the lack of investment and active marketing of these units is likely to be pursuant to future development aspirations. We are not aware that any planning application has yet been forthcoming.

Summary

- Staines is the largest town centre in the Borough and performs an important retail function. The centre has a particularly strong comparison goods offer, with the proportion of units occupied by such uses being above the national average. The analysis of shopping patterns demonstrates that Staines, including the Two Rivers shopping centre, has a strong market share in all survey zones, competing effectively as a top destination for all goods types.
- In terms of convenience goods, the Waitrose foodstore at Two Rivers performs very well and is a key attractor in the centre, and the M&S store has a popular foodhall, but overall the number of units occupied by convenience goods retailers is particularly limited and well below national average. The town centre has a combined Zone 2

market share of 32.6%, compared to a strong out-of-centre combined market share of 44%. The proportion of service operators is in line with the national average, and vacancy rates remain particularly low and scattered throughout the centre.

- The town centre comprises three distinct retail areas including Two Rivers, the High Street and Elmsleigh Shopping Centre. The Two Rivers scheme has been a particular success, with Waitrose being a key anchor and footfall on Norris Road – the key link route with the remainder of the main shopping area – being the second highest in the town centre. Following the development of Two Rivers, footfall around Elmsleigh and High Street has remained particularly strong, demonstrating the complementary nature of the different retail areas and the success of the linkages between each one.
- The survey results identify a town centre performing well, with a number of key attractors and a good range of town centre attractions. This ensures frequent visits from a loyal customer base that choose to stay in the centre for reasonably lengthy periods of time. Linked trips between these different attractions have been identified, whilst areas for improvement are primarily focused on an improved range/quality of shops.
- Two Rivers has demonstrated the ability of Staines to offer modern retail formats and to attract new key retailers and leisure operators to the town centre. The offer is currently mass/mid-market and Staines has the opportunity to build on that success and provide further new, modern accommodation for existing operators and those not yet represented in the town centre. The identified development opportunity (Allocation A10) is key to this next stage of transformation and should continue to be prioritised. The strength of Two Rivers and associated car parking would likely maintain the status quo of the town centre alongside the redevelopment of the Elmsleigh Shopping Centre.

5. Ashford Town Centre Audit

- 5.1 Ashford town centre is located approximately 3km east of Staines. The B378 runs through the centre, providing access to the A30, and Ashford train station provides regular services to Reading and London Waterloo.
- 5.2 It is within a predominantly residential area and is primarily linear in nature, with the frontage extending along Church Road from Percy Avenue to the train station, with a limited extension of frontage at the station along Woodthorpe Road. The Ashford campus of Brooklands College is situated at the middle to the eastern end of the centre.

Town Centre Composition

- 5.3 Based on the latest survey undertaken by Experian Goad (April 2013), the town centre currently comprises 17,076 sqm gross retail and service floorspace across 143 units. Tables 5.1 and 5.2 below summarise the composition of uses across the centre. The data shows that Ashford has a higher than average proportion of service units and floorspace, which reflects its position in the retail hierarchy as a Local Centre. The majority of these service units are within either the 'restaurant, café, fast food and takeaway' or 'hairdressing, beauty and health' categories.

Table 5.1: Ashford Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance (%)
Convenience	12	8.39	8.80	-0.41
Comparison	54	37.76	40.95	-3.19
Service	62	43.36	36.46	+6.9
Vacant	13	9.09	12.63	-3.54
Misc.	2	1.40	1.15	+0.25
Total	143	100	100	-

Source: Experian Goad Category Report (April 2013)

Table 5.2: Ashford Composition of Uses (Floorspace sqm gross)

	Floorspace	% of Total	UK Average (%)	Variance (%)
Convenience	2,443	14.31	17.78	-3.47
Comparison	6,875	40.26	46.05	-5.79
Service	6,401	37.49	24.44	+13.05
Vacant	1,189	6.96	10.70	-3.74
Misc.	167	0.98	1.03	-0.05
Total	17,076	100	100	-

Source: Experian Goad Category Report (April 2013)

- 5.4 The proportions of convenience and comparison units and floorspace are correspondingly below the national average as a result of the high proportion of service units. There is, however, a healthy range of stores offering a choice of goods within the centre. In terms of foodstores, the centre includes a Tesco Express, Sainsburys Local and Londis. None of these stores is large and they predominantly serve a 'top-up' need, but between them and a number of other, independent convenience operators, which include a baker, butcher and greengrocer, the centre offers a good range of options. At the time of our visit these stores were relatively busy.
- 5.5 In terms of non-food retail, again there is a good range of stores. The most common types of comparison retail are charity shops, hardware and household goods, and carpets and textiles. Service retail units include a number of hairdressers, cafés, and beauty salons, as well as travel agents, estate agents and banks. These represent a higher order of uses which suggests that Ashford is performing its role within the retail hierarchy.
- 5.6 Service retail units in particular comprised national multiples, including Costa Coffee, Lloyds TSB, HSBC, Santander and Natwest banks, Haart and Your Move estate agents, and Thomas Cook and Thomson travel agents. Other multiples include the Post Office, Boots Pharmacy, Wimpy fast food restaurant and Hallmark cards.
- 5.7 Ashford town centre does not include any clothing shops, beyond the second hand clothes available in the charity shops. Multiple retailers tend to be convenience or service operators, with few units within the comparison sector. There are a few non-retail uses within the centre including a number of small offices and dwellings, a dental surgery, an

accountant, a betting shop and Brooklands College, one of Surrey's largest providers of further and Higher Education. These uses help to diversify the role of the centre and provide activity throughout the day.

- 5.8 Tables 5.1 and 5.2 show that the centre has below average proportions of vacant units and floorspace. This suggests that the centre is performing well. At the time of our visit there did not appear to be any significant clustering of vacant units, and the proportion of vacancies was approximately level with that at the time of Experian's most recent audit 15 months previously (in April 2013).
- 5.9 Since the Experian assessment, notable changes include the loss of a butcher which has become vacant, and the conversion of a vacant public house to an antiques store and coffee shop. There were a number of vacancies of the small units contained in the Central Parade towards the northwest of the centre, though this may have been due to refurbishment works taking place.

Shopping Patterns

- 5.10 The Household Telephone Survey undertaken in June 2014 identified local shopping patterns in Zone 3, the zone in which Ashford is located. Analysis of these shopping patterns provides an overview of the current role and function of Ashford as a shopping destination.
- 5.11 In terms of convenience goods, Ashford has a stronger market share than Staines in its core catchment. Combined, the foodstores in the town centre have a market share of 42.5% in Zone 3; with the remaining trade being directed primarily to the Tesco Extra at Sunbury Cross (8.5%), the Tesco Extra at Ashford (18.7%) and the Sainsbury's on The Causeway (3.6%). The figures demonstrate the strength of the convenience goods offer in Ashford town centre, and its key role in the overall health of the town.
- 5.12 As you would expect in a smaller centre, the comparison goods role is weaker, with a market share of 11.9% in core Zone 3. This is not a sign of a weak centre, however, and reasonable market shares in adjoining zones 4 (7%) and 11 (4.7%) reflect the wider attraction of Ashford town centre. The strongest comparison goods sectors in Ashford include 'furniture and floor coverings' and 'personal care/beauty'. 'DIY and decorating goods' and 'domestic appliances' also have a reasonable trade draw, but clothing, footwear and luxury items have negligible responses.

Customer Views and Behaviour

5.13 An in-depth visitor survey was undertaken in Ashford town centre, and we summarise the key findings below:

- The main purpose for visiting the centre was for food shopping (26.7%), followed by non-food shopping (16%), financial services (12%), donation to charity shop (8%), meeting friends/socialising (5.3%), personal services, i.e. hairdressers (5.3%), going to a café/restaurant (4%);
- When asked what else would they be doing in Ashford town centre, the top responses were food shopping (28%), non-food shopping (16%), financial services (10.7%) and going to a café/restaurant (8%). Only 33.3% said 'nothing else'. The survey results have identified linked trips across the centre, which is a positive indicator of its vitality and viability;
- Respondents were asked about the main stores they were intending on visiting, and the results highlighted the centres key attractors including Co-Op (35.7%), Tesco (30.4%), The Jolly Baker (10.7%), and charity shops (7%);
- In terms of mode of transport, 44% of visitors arrived by car and 40% arrived on foot; only 6.7% arrived on the bus and 4% cycled. The length of journey was primarily less than 10 minutes, with 21.3% of people travelling for between 10 and 20 minutes. The breadth of offer in Ashford is reflected in the 'length of stay' with 37.3% staying for up to half an hour, and 53.4% staying between 30 minutes and 2 hours. 80% of people visit at least once a week with 40% visiting at least 3 times a week;
- A number of responses were identified for 'likes' including being close to home (33.3%), good layout/shops close together (38.7%), easily accessible by foot/cycle (10.7%), good places to eat (10.7%), good range of independent/specialist retailers (10.7%), easy to park (9.3%), and good quality shops (6.7%);
- The list of dislikes is more limited with the main focus being on choice and quality. A number of people cited, for example, choice of shops (16%), the absence of clothes shops (10.7%), poor quality shops (8%), and too many shops of the same type (14.7%). There may be the potential to improve the range of shops, but it must be remembered that this is a local shopping centre and should not aspire to compete with the range and quality on offer in larger centres.

Summary

- The centre appears to be healthy and performing its local centre role as envisaged in the Core Strategy. As you might expect, the service offer is above national average providing a good range of banks, building societies, cafes and health and beauty shops. The convenience offer is in line with the national average, and includes a Tesco Express, Sainsbury's Local and a Londis store – all top up destinations.
- Comparison uses are below the national average and include charity shops, hardware shops, household goods and carpets, for example. There is little representation of clothing and footwear retailers, but again this is to be expected in a small, local centre. Non-retail uses, including Brooklands College which is a good driver of footfall in the town centre, and vacant units remain low with no clusters identified.
- Convenience goods floorspace has a strong market share in Core Zone 3, competing effectively with out-of-centre main foodstores. Comparison goods market shares are reasonable with an 11.9% market share in Core Zone 3, and trade draw from neighbouring Zones 4 and 11.
- The results of the survey reflect a strong and healthy centre with the key anchor being the convenience goods offer, followed by reasonably strong comparison and service sectors. Linked trips have been identified, and over half of visitors stay for between 30 minutes and 2 hours. The key attractions of the centre are the compact nature of the shopping streets, ease of access by foot/cycle, eating/drinking provision and the good range of independent retailers.

6. Shepperton Town Centre Audit

6.1 Shepperton town centre is located approximately 2.5km west of Walton-on-Thames. The centre fronts onto the B376 (High Street), which provides access to the A244, and thereafter Walton-on-Thames or Sunbury Cross and the M3. Shepperton train station provides services to London Waterloo in 54 minutes every half an hour. Shepperton is a predominantly residential area and the centre is linear, with the frontage extending along High Street and Station Approach.

Town Centre Composition

6.2 The River Thames is a short walk to the south of the centre, through woodland and playing fields. The town centre is attractive with mature tree planting and a good quality built environment. The retail offer includes a mix of multiple retailers and good quality niche/independent retailers including clothing and household accessories boutiques.

6.3 Based on the latest survey undertaken by Experian Goad (October 2011), the town centre comprises 9,467 sqm gross retail and service floorspace across 72 units. Tables 6.1 and 6.2 below summarise the composition of uses across the centre.

6.4 Tables 6.1 and 6.2 demonstrate that Shepperton has a higher than average proportion of all types of uses except vacancies, which suggests that Shepperton is performing particularly well. Services are particularly well represented with the majority being within the 'restaurant, cafés, fast food & take away' category.

Table 6.1: Shepperton Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance (%)
Convenience	7	9.72	8.80	+0.92
Comparison	30	41.67	40.95	+0.72
Service	30	41.67	36.46	+5.21
Vacant	4	5.56	12.63	-7.07
Misc.	1	1.39	1.15	+0.24
Total	143	100	100	-

Source: Experian Goad Category Report (October 2011)

Table 6.2: Shepperton Composition of Uses (Floorspace sqm gross)

	Floorspace	% of Total	UK Average (%)	Variance (%)
Convenience	2,258	23.85	17.78	+6.07
Comparison	3,698	39.06	46.05	-6.99
Service	3,057	32.29	24.44	+7.85
Vacant	344	3.63	10.70	-7.07
Misc.	111	1.18	1.03	+0.15
Total	9,467	100	100	-

Source: Experian Goad Category Report (October 2011)

- 6.5 There is a good range of stores offering a choice of convenience goods within the centre. In terms of foodstores, the centre includes a Budgens, a Co-operative Food, a number of greengrocers and small convenience stores, and a butcher. These stores were relatively busy at the time of our visit and serve a predominantly lower order 'top up' need. The BP petrol filling station has also recently been redeveloped to incorporate a Marks & Spencer foodstore.
- 6.6 In terms of non-food retail, there is a range of stores including a number of charity shops, household goods stores, and chemists and opticians. As mentioned previously there are a number of higher quality boutique/niche clothing, footwear, gifts and household accessory retailers which contributes to the overall town centre offer.
- 6.7 Service retail units, particularly cafés, appeared to be performing best at the time of our audit. This is likely to have been assisted by the generous provision of on-street car parking in the centre, where there was no charge for a stay of up to 3 hours. Other service retail units in the centre include hairdressers, nail salons, estate agents and high street banks. This broad range adds to the overall pull of the centre as a destination for linked trips.
- 6.8 There are some non-retail uses within the centre including a number of small offices and dwellings, a library, a post office, a betting shop, a veterinarians and a community centre. The centre also benefits from a pleasant, tree-lined public realm. These characteristics further diversify the centre and serve to increase its attractiveness.

6.9 Tables 6.1 and 6.2 show that the centre has below average proportions of vacant units and floorspace. Broadly, the number of vacancies was the same as at the time of the most recent Experian survey (October 2011), with 2 units becoming vacant but a number being occupied which were previously undergoing redevelopment. There was some limited clustering of vacant units at Shepperton House, towards the north of the centre at the corner of the High Street and Green Lane.

Shopping Patterns

6.10 The telephone survey undertaken in June 2014 identified local shopping patterns across the survey area, including Zone 6, the zone in which Shepperton is located.

6.11 The foodstore most visited in Shepperton town centre, by those living in Zone 6, is the Budgens store on the High Street (17.4%), followed by the Co-op (5.9%), and 'other' convenience units (9.9%). The most popular out-of-centre store is the Tesco Extra at Sunbury Cross (26%); this compares to a combined town centre market share of 33.2%. The convenience offer in the town centre is performing reasonably well given its top up function, and aside from the out-of-centre Tesco at Sunbury Cross there are no key alternative destinations identified in the survey results.

6.12 In terms of comparison goods, Shepperton has a market share of 9.7% in Zone 6, a reasonable performance for a local centre. Shepperton is located to the east of the Spelthorne catchment, and it is evident that Kingston is having a greater impact on trade draw than Staines in this core Shepperton catchment (Zones 5, 6 and 7). Shepperton has the strongest trade draw in the 'furniture and floorcoverings' (6.6%) and 'DIY and decorating goods' (11.5%) categories.

Customer Views and Behaviour

6.13 A more in-depth visitor survey was undertaken in Shepperton, and we summarise the key findings below:

- The main purpose for visiting Shepperton town centre was for food shopping (34.2%), followed by 'I work here' (10.1%), non-food shopping (10.1%), meeting friends/socialising (7.6%), financial services (7.6%), going to a café/restaurant (5.1%);

- When asked what else would they be doing in Shepperton town centre, a number of linked trips were identified, including food shopping (19%), going to a café/restaurant (12.7%), non-food shopping (11.4%), financial services (10.1%), general browsing/window shopping (8.9%) and meeting friends/socialising (7.6%);
- The key attractor in the centre is Budgens in Shepperton (62.7%), followed by the Co-Op store (13.7%), charity shops (7.8%), and the newsagents (5.9%);
- In terms of mode of transport, 45.6% of visitors travelled to the centre on foot, 46.9% arrived by car, 2.5% arrived on the bus, and 1.3% arrive by bicycle. When asked how long their journey took, 82.2% stated less than 10 minutes, demonstrating the localised catchment area. The survey identified that 35.4% of people would stay for up to 30 minutes, whilst 35.4% would stay in the centre for 30 minutes to 1.5 hours. The remaining 29.2% were intending to stay for between 1.5 hours and 'all day'. Frequency of visit is strong with 91.1% visiting at least once a week, and of those 35.4% visit daily, and 31.6% visit 2-3 times a week;
- Attitudes towards the centre are positive with a number of different 'likes' identified. These include compact/good layout (24.1%), good range of smaller independent shops (17.7%), good quality shops (5.1%), attractive and pleasant environment (39.2%), friendly people/village atmosphere (24.1%), and it feels safe and secure (20.3%). 21.5% stated that they liked 'everything' about the centre;
- The main dislikes related to traffic congestion (17.7%) and lack of surface level parking (15.2%). When asked what they would improve about the centre, 6.3% stated better facilities for youths; other responses included more leisure, sports and cultural facilities (5.1%), and more car parking (22.8%).

Summary

- Shepperton town centre has an attractive environment, mature tree planting and a good mix of multiple retailers and smaller niche/boutique independent retailers. Visitors to the centre and the local catchment are positive in their attitudes towards the centre which they feel is friendly and pleasant with a village atmosphere.
- The centre has a strong convenience goods offer, and as you might expect in a local centre this is the key driver for visitors. Budgens is the key attractor in the centre, and together with other convenience goods floorspace, the town centre has a market

share within Zone 6 of 33.2% (i.e. 33.2% of people in Zone 6 shop for convenience goods in Shepperton town centre). This compares reasonably well with the out-of-centre Tesco Extra at Sunbury Cross which has a Zone 6 market share of 26%. Clearly, there should be aspirations to increase the market share of the town centre which underpins its vitality and viability; this will be achieved once the redeveloped BP station reopens with an M&S offer.

- The comparison goods mix is strong with a range of everyday comparison multiples, and a good mix of independent niche/boutique retailers. The visitor experience is enhanced with a good mix of cafes, financial and other services, and free on-street parking for up to 3 hours. Vacant units remain particularly low, and overall we conclude that the centre is performing well and is healthy.

7. Sunbury Cross Town Centre Audit

7.1 Sunbury Cross is located approximately 1.8km north of Sunbury-on-Thames and 3km south of Feltham. It is situated at the junction of the M3/A316 and the A308. Sunbury train station, located east of the centre over the M3 junction roundabout, provides half-hourly services to London Waterloo in 49 minutes, and to Shepperton in 5 minutes. The areas to the north, west and southeast of the centre are predominantly residential, and to the south west and north east are predominantly light industrial.

Town Centre Composition

7.2 There is a large out-of-centre Tesco Extra store immediately to the south of the centre. The frontage comprises a linear parade along the north-western portion of the M3 roundabout and the A308, which bisects the centre; and Sunbury Cross Shopping Centre, a collection of shops in an un-covered centre arranged around a central car park with residential tower blocks above.

7.3 The A308 acts as a barrier between the two halves of the centre, at the Shopping Centre and the Parade, though there is a pedestrian underpass which aids linked trips. There has been some upgrading of the public realm at the Parade, to include planting, cycle parking and seating, though the centre remains visually dominated by the main road.

7.4 Based on the latest survey undertaken by Experian Goad (April 2013), the town centre currently comprises 15,738sqm gross retail and service floorspace across 64 units. Tables 7.1 and 7.2 below summarise the composition of uses across the centre.

7.5 Table 7.1 shows that Sunbury Cross has higher than average proportions of convenience and service units, and a lower proportion of comparison units. The majority of these service units are either within the 'restaurant, café, fast food and takeaway' category or are estate agents.

Table 7.1: Sunbury Cross Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance (%)
Convenience	10	15.63	8.80	+6.83
Comparison	22	34.38	40.95	-6.57
Service	27	42.19	36.46	+5.73
Vacant	3	4.69	12.63	-7.94
Misc.	2	3.13	1.15	+1.98
Total	64	100	100	-

Source: Experian Goad Category Report (April 2013)

Table 7.2: Sunbury Cross Composition of Uses (Floorspace sqm gross)

	Floorspace	% of Total	UK Average (%)	Variance (%)
Convenience	8,891	56.49	17.78	+38.71
Comparison	2,917	18.54	46.05	-27.51
Service	3,298	20.96	24.44	-3.48
Vacant	474	3.01	10.70	-7.69
Misc.	158	1.00	1.03	-0.03
Total	15,738	100	100	-

Source: Experian Goad Category Report (April 2013)

- 7.6 In terms of foodstores, the centre includes a Farmfoods, Costcutter and a large Marks & Spencer Simply Food. There are also two small convenience stores and a Greggs bakery. The larger convenience stores were busy at the time of our visit, and together these stores represent a reasonable variety of convenience provision. The stores also individually serve different needs to those catered for by the large Tesco Extra superstore to the south of the centre.
- 7.7 There is a range of comparison stores in the centre, including a chemist, a jeweller, an optician, a small clothes store, three household goods stores, a car and cycle parts store and a photo store. Service retail units include a number of cafés, fast food outlets and

takeaways, as well as beauty and hair salons, Barclays bank, undertakers and estate agents.

- 7.8 There are a number of non-retail uses within the centre including offices and dwellings, a hotel, a social club, a betting shop, a joint library and Citizens' Advice Bureau, and a Post Office. These uses help to diversify the role of the centre and provide activity throughout the day.
- 7.9 Tables 7.1 and 7.2 show that the centre had below average proportions of vacant units and floorspace at the time of the Experian survey. However, when we visited the centre in August 2014 four more units had become vacant. These vacancies are also relatively clustered, being towards the eastern side of the Sunbury Cross Shopping Centre, and only one appears to be being actively marketed. Operators lost since the Experian survey includes a cheque cashing centre, a sports goods store, a travel agent, and a charity shop.

Shopping Patterns

- 7.10 The telephone survey undertaken in June 2014 identified local shopping patterns across the survey area, including Zones 4 and 5. Sunbury Cross lies on the border of Zone 4 and 5, and we have included an analysis of both zones which reflects the core catchment of the town centre.
- 7.11 The survey has suggested a low market share for the M&S Simply Food (2.9% and 3.2% respectively), but we believe the survey has underestimated the level of trade draw. The store appeared busy when visited, and is likely to perform the role of a key top up destination to passing 'car borne' trade given its position on and adjoining the major road network. Nevertheless, the survey results suggest that convenience goods floorspace in Sunbury Cross is not performing the role of key attractor. The main competing provision is the out-of-centre Tesco Extra, close by just outside Sunbury Cross; this has a market share of 60.2% and 56% in Zones 4 and 5 respectively.
- 7.12 Sunbury Cross has a strong trade draw for comparison goods, with a market share of 10.9% and 16.0% in Zones 4 and 5 respectively.

Customer Views and Behaviour

7.13 A more in-depth visitor survey was undertaken in Sunbury Cross, and we summarise the key findings below:

- The main purpose for visiting the town centre is for food shopping (44%), followed by financial services (16%), non-food shopping (13.3%), other services (4%), and going to a café (4%);
- When asked what else they would be doing in the centre that day, a high proportion said 'nothing else' (57.3%), demonstrating the importance of food retailing to the health of the town centre. Some linked trips were identified, with respondents citing (food shopping (14.7%), financial services (6.7%), non-food shopping (5.3%), and general browsing/window shopping (4%);
- The key attractor in the centre is M&S (71.2%), followed by Boots (17.3%), Farmfoods (15.4%), and Costcutter (9.6%). The results of the survey are heavily skewed towards a reliance on the convenience goods floorspace in the centre, and this should be protected over the forthcoming plan period;
- In terms of mode of transport, 60% arrived by car. This is higher than other centres in the Borough, reflecting its position on the main road network. 34.7% of people travelled to the centre on foot, and 1.3% by bicycle. When asked how long their journey took, 74.7% stated less than 10 minutes, whilst a further 21.3% stated between 11 and 20 minutes. Shorter stay times reflect the more limited range of shops and cafes; 56% of people stay for less than 30 minutes;
- When asked what visitors liked about the centre, views were focused again on the presence of good foodstores (21.4%); other responses included 'nothing/very little' (24%), close to home (33.3%), compact/good layout (16%), easy/free parking (28%). When asked about dislikes there appeared little loyalty or ownership of the centre, with 48% stating 'nothing'; a further 22.7% mentioned the poor state of the environment, and 13.4% stated security and vandals;
- When asked what visitors would like to see improved in the centre, responses included a better choice of shops (12%), better maintenance/cleanliness (13.3%), an improved appearance/environment (20%), improved security including CCTV (6.7%), more car parking (8%), and more pubs, restaurants, cafes (4%).

Summary

- Sunbury Cross town centre is intersected by the A308, with a more traditional parade of shops on one side, and a concrete, purpose built parade/shopping centre on the south side. Linkages are via under-passes and road traffic crossings. The centre has no soft landscaping and is dominated by the main road network, but investment in the public realm is evident at the parade of shops, with new paving, seating and cycle parking.
- Convenience floorspace underpins the health of the centre with M&S being the key attractor, supplemented with Costcutter, Farmfoods and Boots. Shopping patterns in this catchment are dominated by the nearby Tesco Extra which has a market share of 60.2% in Zone 4 and 56% in Zone 5. Other units provide important everyday 'top up' facilities and goods, as well as a reasonable range of cafes/coffee shops.
- Attitudinal responses suggest an absence in customer loyalty or ownership of centre with 48% stating that they liked 'nothing' about the centre, and disliked the state of the environment and security/vandals. Shoppers wished to see a better choice of shops, an improved environment and security/CCTV. Overall, Sunbury Cross provides important everyday facilities, but offers a limited range of retail and town centre facilities, visited by people due to 'convenience' rather than 'choice'. This creates a vulnerable position if nearby competition were to be increased.

8. Quantitative Needs Assessment

- 8.1 This section outlines the quantitative assessment methodology used to identify shopping patterns and quantitative retail need. Using the results of the household telephone survey (2014) we provide an analysis of shopping patterns arising in the survey area. The current performance of convenience and comparison goods floorspace across the Borough is then used as the basis for forecasting the need for additional retail floorspace in five year periods up to 2034.
- 8.2 It is important to note that capacity forecasts become increasingly open to margins of error over time and will be influenced by potential changes in economic circumstances. Longer term projections should be treated with caution. As such, it will be necessary for the Council to update these forecasts regularly over the Local Plan period.
- 8.3 For clarity, the capacity figures referenced below and set out in Appendix 2 (for convenience goods floorspace) and 3 (for comparison) are cumulative.

Methodology

- 8.4 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the household telephone survey (2014) of existing shopping patterns to model the existing flows of available expenditure to centres in Spelthorne. We also identify the main competing centres which have an influence on shopping patterns in the Borough. To develop the baseline position we have:
- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode and ward areas comprising the Spelthorne 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.

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- 8.5 Building on the baseline position, we have explored the need for further convenience and comparison retail floorspace within the Borough, having regard to the performance of existing floorspace.

Data Inputs

Survey Area and Household Telephone Survey

- 8.6 In order to identify shopping patterns across the Borough, GVA commissioned a new household telephone survey covering 1,500 households across 13 survey zones. GVA designed the survey questionnaire in consultation with the Council and NEMS Market Research, who undertook the interviewing and data processing in early July 2014. The wording of the survey was structured to ensure that the results are representative of shopping habits across the whole of the year.
- 8.7 The extent of the study area is illustrated in Plan 1. Zones 1, 2, 3, 4, 5, 6 and 11 are referred to in this report as Spelthorne's "core zones", as they most closely approximate the extent of the Borough boundary, and hence are particularly useful for determining shopping patterns for Spelthorne residents.
- 8.8 The household telephone survey results (2014) 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.
- 8.9 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.
- 8.10 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.

8.11 In order to determine the composite 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.

Estimates of Population in the Survey Area

8.12 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 from 2012 to 2032, incorporating the results of the 2011 Census. After 2033, population growth is assumed to remain constant at the 2029-2032 rate.

8.13 Overall, the population of the survey area in 2014 is estimated to be 295,714. It is forecast to grow to 313,669 by 2019 and 329,722 by 2024. By 2034, the population of the survey area is forecast to reach 356,153. This represents an overall strong increase of 20.4% over the course of the assessment period.

8.14 We have undertaken a direct comparison with CLG published population figures, and the comparable figures are set out in Table 8.1 below. We have compared the population projections for the Borough as published by CLG, and our 'best fit' catchment area with the Borough boundary, i.e. survey zones 1, 2, 3, 4, 5, 6 and 11.

8.15 The CLG projections and our 'best fit' population projections are different in terms of overall population numbers because small areas of the survey zones fall outside of

Spelthorne and include population from neighbouring authority areas. However, when comparing the overall increase in actual population and growth percentage the figures demonstrate a strong consistency. Population should be updated at appropriate intervals during the plan period, reflecting mid-term estimates and specific areas of residential growth where relevant.

Table 8.1: Comparison of Experian and CLG Population Forecasts

Year(s)	Spelthorne Core Zones Zones 1, 2, 3, 4, 5, 6 & 11		CLG 2014	
	Population	Growth	Population	Growth
2014	107,682	-	98,400	-
2019	113,042	4.98%	103,100	4.78%
2024	118,321	4.67%	107,800	4.56%
2029	122,691	3.69%	112,100	3.99%
2034	127,664	4.05%	116,200	3.66%
2014-2034	+19,982	18.56%	+17,800	18.09%

Source: Experian Business Strategies (July 2014), CLG 2014

Available Expenditure in the Survey Area

Deductions for Special Forms of Trading (SFT)

- 8.16 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure in 2012 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 11 and are set out in Table 2 of Appendices 2 and 3 respectively.
- 8.17 We have undertaken a 'sense check' to confirm that the SFT deductions applied are reasonably consistent with household survey evidence in the Borough area. We have assessed the weighted, non-filtered results of the household survey, which indicate that approximately 5.1% of convenience expenditure across the entirety of the study area is derived from the internet (weighted 70% main food/ 30% top-up food shopping). In

Spelthorne's core zones, the survey results indicate that internet spending appears to be slightly lower, accounting for 4.5% of all convenience expenditure.

- 8.18 Since non-store retailing figures include supermarkets and other retailers that source internet goods sales from store space, the share of non-store retailing is over-stated when assessing requirements for physical floorspace. Experian recommend a deduction of 70% to take this into account, which would bring total SFT deductions to around 1.5%. However, the results are based on where households are most likely to do most of their main food and top-up shopping, and it may be that the results may understate the influence of the internet on convenience expenditure. As such, we consider that it remains appropriate to adopt Experian estimates of 2.7% in 2014, growing across the assessment period as set out in Table 2 of Appendix 2.
- 8.19 Based on weighted (non-filtered) household survey results, weighted to the various comparison goods expenditure sub-categories, the household survey results indicate that internet/mail-order spending accounts for around 14.6% of comparison goods expenditure across the study area. The household survey results show that internet shopping varies across various goods categories, from 10.1% (clothing goods), 14.3% (furniture goods), 2.9% (DIY), 27.8% (domestic appliances), 21.9% (audio-visual goods), 3.4% (personal and medical goods) and 25.9% (recreational and luxury goods). We consider that this is reasonably close to Experian estimates, which we have adopted for the purposes of this study.

Growth Rates

- 8.20 To estimate available expenditure in the survey area, we have applied growth rates based on economic forecasts published by Experian Business Strategies (Retail Planner 11). For convenience goods we have applied growth rates of -0.6% pa between 2012 and 2013; -0.3% pa between 2013 and 2014; 0.1% pa between 2014 and 2015; and 0.8% pa from 2016 to 2034. For comparison goods we have adopted growth rates of 3.2% pa between 2012 and 2013; 2.3% pa between 2013 and 2014; 2.8% pa between 2014 and 2015; 3.0% pa between 2016 and 2020; and 2.9% pa from 2021 onwards. Experian only forecast growth rates up to 2030, so for the purposes of this study we have assumed that convenience and comparison growth rates from 2031 onwards will remain stable, at 2030 levels.

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- 8.21 These growth rates reflect our expectation that spending on comparison goods will grow faster than convenience goods, as the scope to purchase more food is limited. These assumptions take into account current economic circumstances and the effects of the recession, which have had a significant impact on forecast levels of growth expected over the assessment period.

Available Expenditure

- 8.22 Taking these considerations into account, expenditure has been generated within each zone to highlight variations across the survey area. Using the growth rates above and applying relevant deductions for SFT, total available expenditure across each of the zones and the survey area as a whole has been grown in five year intervals (of 2019, 2024 and 2029) up to 2034. These five year intervals represent 5 year forecasting periods as required by the NPPF.
- 8.23 Appendix 2, Table 3 applies per capita expenditure within each zone to the population forecasts, which indicates that total available convenience goods expenditure within the survey area at 2014 is £570.1m. This is forecast to grow to £616.1m by 2019, £667.4m by 2024, £716.1m by 2029, and to a total of £774.5m by 2034. This equates to an overall growth of £204.4m between 2014 and 2034 (36% growth).
- 8.24 Comparison goods expenditure within the survey area at 2014 is £876.4m. This is forecast to grow to £1.03bn by 2019, £1.24bn by 2024, and £1.48bn by 2029, to a total of £1.78bn by 2034. This equates to an overall growth for comparison goods expenditure in the survey area of £904.9m between 2014 and 2034 (103% growth) (Appendix 3, Table 3).
- 8.25 Again, longer term projections should be treated with caution due to the potential for changing economic circumstances and susceptibility of longer-term forecasts to margins of error.

Floorspace Data

- 8.26 The convenience and comparison goods floorspace data used in our modelling has been drawn from the Institute of Grocery Distribution (IGD) and Experian Goad.
- 8.27 Our floorspace assumptions for the foodstores include adjustments, where necessary, to identify the proportion of purely convenience goods floorspace. Most superstores include

a proportion of non-food floorspace; we have adjusted the net floorspace to identify the proportion of sales floorspace allocated for convenience goods based on 2014 data from Verdict Grocery Retailers.

Benchmark Sales Densities

- 8.28 For convenience goods, we have estimated the expected benchmark turnovers of various stores within the Borough area by adopting company average sales densities from Verdict Grocery Retailers 2014. Sales densities for the larger retailers range from £7,823 per sqm net for the Co-Op to £12,561 per sqm net for Waitrose.
- 8.29 Published average sales density for other un-named operators in Staines town centre is not available. We have therefore assumed the remainder of convenience floorspace in Staines will have a sales density of £7,500 per sqm net, which is considered reasonable bearing in mind the size of the centre. We have assumed that “all other” stores in Ashford, Shepperton, Sunbury Cross and elsewhere in the Borough would achieve an average turnover of £5,000 sqm net, which reflects their size and position in the retail hierarchy.
- 8.30 No benchmarking exercise is undertaken for comparison goods, as there is more limited published floorspace and benchmark turnover data for these types of goods.

Convenience Goods Capacity Projections

- 8.31 Drawing on our qualitative assessment of the health and performance of existing centres and the main out-of-centre retail destinations in the Borough, this section presents our analysis in respect of the capacity for additional convenience floorspace over the plan period to 2034. The detailed models are set out in Appendix 2.

Market Shares and Current Performance

- 8.32 Using the adjusted market shares derived from the household telephone survey and baseline expenditure estimates, we have calculated market shares attributed to the main convenience destinations in the Borough.
- 8.33 Table 8.2 below provides a summary of existing market shares attributed to the main destinations and overall retention of convenience goods expenditure within the Borough.

Due to differences in the extent of the survey zones, it has only been possible to compare the results of the household survey to the 2004 Retail Study for Spelthorne's core zones.

Table 8.2: Convenience Expenditure Market Shares in 2014 (%)

	Core Zones (1-6,11)			Survey Area (Zones 1-13)
	2004	2014	Change	
Staines	12.0	10.4	-1.6	5.1
Ashford	7.9	10.3	+2.4	4.1
Shepperton	4.1	5.0	+0.9	2.2
Sunbury Cross	7.1	3.3	-3.8	1.5
Other Local Stores	-	8.1	+8.1	3.4
Out-of-Centre Stores	29.1	40.6	+11.5	17.7
Total Inside Borough (RETENTION)	60.2	77.7	+17.5	34.0
Total Outside Borough (LEAKAGE)	39.8	22.3	-17.5	66.0

Source: 2004 Retail Study and 2014 Household Survey.

- 8.34 As shown, the results of the household survey show that within Spelthorne's core zones retail destinations within the Borough retain 77.7% of total convenience expenditure. This is considered high and reflects the strong local convenience offer in the area. Since 2004, the overall retention rate from core zones has increased by around 17.5%. A large proportion of this increase is accounted for by the Borough's out-of-centre stores.
- 8.35 Across the survey area as a whole, the Borough has a retention rate of 34.0%. This is considered reasonable bearing in mind the geographic extent of the survey area and the proximity of other competing centres and destinations.

Staines

- 8.36 Convenience destinations in Staines account for 10.4% of convenience expenditure from the core zones, or around 5.1% across the study area. Staines' retention rate from the core zones is slightly lower than recorded in the 2004 Retail Study.
- 8.37 In total, we estimate that convenience stores in the centre have a current turnover of £29.0m (Appendix 2, Table 5). Circa 60.5% is derived from residents in Zone 2, Staines' home zone.
- 8.38 The Waitrose accounts for more than half (63.5%) of all convenience expenditure retained in the centre. The results of the household survey indicate that the store has a total turnover of £18.4m, which is approximately 15% lower than expected company benchmark levels. The store draws almost 80% of its trade from Spelthorne's core zones, most of which comes from its own zone (Zone 2).
- 8.39 Together, the other convenience stores in the centre (including the Marks and Spencer at the Elmsleigh Centre) have a combined total turnover of £10.6m, which is lower than expected benchmark turnover of £15.1m. This is not uncommon, as surveys do underestimate the performance of city centre 'top up' foodstores, which instead benefit greatly from passing trade from local employees/business, tourists, shoppers and commuters. The household survey results indicate that these other convenience stores in the centre account for 3.7% of total convenience expenditure within the core zones and 1.9% within the survey area.

Ashford

- 8.40 Convenience destinations in Ashford account for 10.3% of convenience expenditure from the core zones, or around 4.1% across the study area. The centre's retention rate from within the core zones has grown by 2.4 percentage points since 2004.
- 8.41 In total, we estimate that convenience stores in the centre have a current turnover of £23.4m (Appendix 2, Table 5). Circa 68% is derived from residents in Zone 3, Ashford's home zone.
- 8.42 The Tesco Express on Church Road accounts for over half of total convenience expenditure retained by the town centre. The results of the household survey demonstrate

that the store currently has a turnover of around £12.5m, which is around five times above expected company levels. The other stores in Ashford town centre also appear to be trading well, at or above expected company benchmark levels.

Shepperton

- 8.43 Convenience destinations in Shepperton account for 5.0% of convenience expenditure from the core zones, or around 2.2% across the study area. The centre's retention rate from within the core zones has grown by just less than 1% since 2004.
- 8.44 In total, we estimate that convenience stores in the centre have a current turnover of £12.8m (Appendix 2, Table 5). Circa 81% is derived from residents in Zones 1 and 6, Shepperton's home zones.
- 8.45 The Budgens on the High Street accounts for around half of total convenience expenditure retained by the town centre. The store has a turnover of around £6.3m, which is around 25% above expected company benchmark levels. The other stores in Shepperton also appear to be trading well, at or above expected company benchmark levels.

Sunbury Cross

- 8.46 Convenience destinations in Sunbury Cross account for 3.3% of convenience expenditure from the core zones, or around 1.5% across the study area. The centre's retention rate from within the core zones has fallen by 3.8%, from 7.1% in 2004.
- 8.47 In total, we estimate that convenience stores in the centre have a current turnover of £8.4m (Appendix 2, Table 5). Circa 59% is derived from residents in Zones 4 and 5, Sunbury's home zones.
- 8.48 The total convenience expenditure retained by the centre is distributed fairly evenly between the Farmfoods, the Marks and Spencer and other smaller operators throughout the centre. Based on the results of the household survey, the Farmfoods is trading around 29% above expected company benchmark levels. Other convenience retailers are trading below expected company levels (including around 67% below average level for the Marks and Spencer).

Out-of-Centre Foodstores

- 8.49 Our analysis of the household survey results has identified the trade draw and catchment areas of the principal out of centre foodstores in the Borough.

Tesco Extra, Ashford

- 8.50 The household survey indicates that the convenience goods element of the Tesco Extra in Ashford turns over £66.7m, which is significantly greater than the expected benchmark of £33.7m. We understand that the store benefits from a recent permission to extend the store by around 1,700 sqm of which 1,500 sqm will be used for the sale of convenience goods. If implemented, the extension is likely to bring the performance of the store more in line with the expected company average.

- 8.51 Most (c. 92%) of the store's trade is drawn from Spelthorne's core zones, of which more than half comes from Zones 4 and 5. The store is by far the most popular convenience goods destination in the Borough. It accounts for 27% of convenience expenditure within Spelthorne's core zones, which exceeds the market share accounted for by all of the centres combined (16.3%). The store's market share from within the core zones has almost doubled since 2004, when it accounted for around 14.6% of total convenience expenditure from Spelthorne's core zones. Within the study area as a whole the store accounts for approximately 11.7% of total convenience expenditure.

Tesco Extra, Sunbury Cross

- 8.52 The household survey indicates that the convenience goods element of the Tesco Extra in Sunbury Cross turns over £36.5m, which is around the store's expected benchmark turnover of £34.4m. However, this may underestimate the current performance of the store as it does not take into account any potential inflow which may be directed to the store from outside of the study area.

- 8.53 Most (c. 89%) of the store's trade from the study area is drawn from Spelthorne's core zones. The store accounts for 13.7% of convenience expenditure within Spelthorne's core zones. The store's market share from within the core zones has declined slightly since 2004, when it accounted for around 14.5% of total convenience expenditure from Spelthorne's core zones. However, it still exceeds the market share which is accounted for by any one of the Borough's centres

8.54 Within the study area as a whole the store accounts for approximately 6.0% of total convenience expenditure.

Commitments and Pipeline Developments

8.55 In order to ensure our capacity forecasts are as up to date and robust as possible, we take account of new convenience goods developments already coming forward as a result of existing planning permissions. We have factored into our assessment the following commitments:

- **Extension to Tesco Extra, Ashford (Ref. 09/00194/FUL):** An extension of the existing store to increase total net sales floorspace by 1,700 sq m, of which 1,500 sq m will be used for the sale of convenience goods and the remainder for comparison.
- **Costco, Sunbury Cross (Ref. 13/01029/FUL):** Development of a 13,006sqm 'warehouse club', which is essentially a 'cash and carry' operation supporting retail and business wholesale, and allows public membership for an annual fee. It is expected that the 'trade' element will represent about 65% of the business, and the 'public' element about 35%. Only the 'public' element has been factored into our capacity modelling. The expected 'public' turnover of the convenience goods element of the store, £16.82m, is derived from the retail evidence submitted in support of the planning application for the development.

Baseline Convenience Capacity

8.56 In assessing capacity for future convenience goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will change over time. We have adopted the advice published by Experian (Retail Planner Briefing Note 11), which estimates per annum sales density changes of -0.7% in 2015, no growth between 2016 and 2020, and 0.1% pa growth from 2021 onwards.

8.57 Based on the combined turnover and current market share of the main convenience destinations in Spelthorne (including out of centre foodstores), we estimate that there will be a deficit of convenience goods expenditure of c. -£47.8m at 2019. By virtue of the forecast growth in population and expenditure, and after allowing for existing in-centre convenience stores to improve sales efficiency in line with Experian's advice, we estimate

that the identified deficit will fall to -£32.0m by 2024, to -£16.9m by 2029, and by 2034 there will be a small surplus of c £1.5m.

8.58 To translate this surplus expenditure into floorspace, we have assumed that mainstream foodstore operators would aim to achieve an average sales density of around £12,000 per sq m net, changing over time in line with Experian's sales density forecasts. As is our normal practice, we have not prepared low and high sales density capacity forecast. Instead we have focussed on the capacity available to support main foodstores. If smaller operators or discount retailers came forward, the amount of capacity arising would be greater as they would achieve a lower sales density.

8.59 Table 8.3 below summarises forecast global capacity for additional convenience floorspace in the Borough assuming a constant market share approach. As stated above, capacity forecasts over the longer term should be treated with caution.

Table 8.3: Convenience Capacity Forecasts for Large Store Format Floorspace (sqm net)

	2019	2024	2029	2034
Floorspace Capacity	-4,015	-2,676	-1,411	121

Source: Table 12, Appendix 2

8.60 Taking into account growth in population and expenditure, we have identified limited capacity to support additional convenience goods floorspace in the Borough by 2034, but no capacity before then. This is due in part to existing commitments in the Borough and in part to the 'under trading' of some of the Borough's stores (and thus their theoretical ability to absorb a proportion of the need arising from population and expenditure growth across the survey area).

8.61 Notwithstanding the above, we consider that there may be qualitative reasons to support the provision of new convenience retail floorspace in defined centres to claw back trade from out of centre stores. Applications for additional floorspace must be tested on a case by case basis taking into account all valid material considerations, including the relevant retail tests set out in the NPPF.

Comparison Goods Capacity Projections

Market Shares

8.62 Using the adjusted market shares derived from the household telephone survey and baseline expenditure estimates, we have calculated market shares attributed to the main comparison destinations in the Borough area.

8.63 Table 8.4 below provides a summary of existing market shares attributed to the main destinations and overall retention of comparison goods expenditure within the Borough. Due to differences in the extent of the survey zones, it has only been possible to compare the results of the household survey to the 2004 Retail Study for Spelthorne's core zones.

Table 8.4: Comparison Expenditure Market Shares, 2004 and 2014 (%)

	Core Zones (1-6,11)			Survey Area (1-13)
	2004	2014	Change	2014
Staines	43.7	53.0	+9.3	38.4
Ashford	3.5	4.2	+0.7	1.9
Shepperton	0.5	1.6	+1.1	0.7
Sunbury Cross	0.8	4.7	+3.9	2.0
Other Local Stores	-	0.2	+0.2	0.1
Out-of-Centre Stores	1.3	5.3	+4.0	3.2
Total Inside Borough (RETENTION)	49.7	69.0	+19.3	46.3
Total Outside Borough (LEAKAGE)	50.3	31.0	-19.3	53.7

Source: 2004 Retail Study and 2014 Household Survey

8.64 As shown, comparison expenditure retention inside the Borough's core zones has increased considerably since 2004. Comparison destinations in the Borough currently account for 69% of total resident spending within the core zones, and 46.3% of total comparison goods expenditure within the survey area as a whole.

Staines

- 8.65 The results of the household survey show that Staines retains approximately 53.0% of available comparison goods spend from Spelthorne's core zones, and around 38.4% from across the survey area as a whole. This is the highest market share of all the centres (and out-of-centre destinations) in the Borough and demonstrates the popularity and strength of Staines as a shopping destination.
- 8.66 Comparison goods floorspace in Staines turns over around £337.0m. Based on the results of the household survey and the scale of existing comparison goods floorspace in the centre (64,664 sq m net, as recorded by the latest Goad Category Report with GVA adjustments), floorspace achieves an average potential turnover of around £5,212 per sq m net.
- 8.67 More than half of the total turnover derived from stores in the town centre (54%) is derived from residents within Spelthorne's core zones. The remainder of turnover is derived from across the wider survey area. The household survey evidence confirms that the centre serves a regional role, attracting expenditure from a wide area which extends beyond the Borough's boundaries. The household survey results demonstrate that Staines' market share from within the core zones has increased by 9.3 percentage points since 2004.

Ashford

- 8.68 The results of the household survey indicate that Ashford town centre achieves a 4.2% market share from within Spelthorne's core zones, and around 1.9% from across the survey area as a whole. Comparison goods floorspace in the centre has a total turnover of around £16.5m. The household survey shows that the centre's turnover comes primarily from zones 3, 4 and 11, where it accounts for 11.9%, 7.0% and 4.7% of total comparison goods expenditure respectively.

Shepperton

- 8.69 Shepperton town centre achieves a 1.6% market share from within Spelthorne's core zones, and around 0.7% from across the survey area as a whole. Comparison goods floorspace in the centre has a total turnover of around £6.1m. The centre's turnover

comes primarily from Zone 1, where it accounts for 10.9% of total comparison goods expenditure.

Sunbury Cross

8.70 Sunbury Cross town centre achieves a 4.7% market share from within Spelthorne's core zones, and around 2.0% from across the survey area as a whole. Comparison goods floorspace in the centre has a total turnover of around £17.9m. The household survey shows that the centre's turnover comes primarily from Zones 4 and 5, where it accounts for 10.9% and 16.0% of total comparison goods expenditure respectively.

Out of Centre

8.71 Out of centre floorspace in the Borough is relatively limited, consisting primarily of freestanding retail warehouses in Staines (Halfords, Homebase) and Ashford (Hitchock and King) and comparison floorspace in the two out-of-centre Tesco Extras. Together, out-of-centre destinations account for 5.3% of total comparison expenditure within Spelthorne's core zones, and around 3.2% from across the survey area as a whole. The retention of out-of-centre stores has increased since 2004, when it accounted for 1.3% of total comparison goods expenditure within Spelthorne's core zones.

Commitments and Pipeline Developments

8.72 We have factored into our assessment the following commitments:

- **Extension to Tesco Extra, Ashford (Ref. 09/00194/FUL):** An extension of the existing store to increase total net sales floorspace by 1,700 sqm, of which 200 sqm will be used for the sale of comparison goods.
- **Costco, Sunbury Cross (Ref. 13/01029/FUL):** The expected turnover of the comparison goods element of the store, £9.46m, is derived from the retail study supported in support of the planning application for the store. As explained in the convenience section above, only the "public" element has been factored into our capacity modelling.

Baseline Comparison Capacity

- 8.73 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. Drawing on the latest advice published by Experian (Retail Planner Briefing Note 11), we have adopted annual sales density growth rates of 2.2% in 2015, 2.1% pa between 2016 and 2020, and 2.0% pa from 2021 onwards.
- 8.74 Based on the combined turnover and current market share of existing comparison goods destinations in the Borough, and after taking into account existing commitments, our assessment concludes that there will be surplus comparison goods expenditure of c. £13.7m by 2019. By virtue of the forecast growth in population and expenditure, and after allowing for existing comparison stores to improve sales efficiency in line with Experian’s advice, we estimate that the surplus of available expenditure will rise to £61.2m by 2024, to £172.8m by 2029, and by 2034 there will be a surplus of c £257.7m.
- 8.75 To translate this surplus expenditure into floorspace, we have adopted the average turnover of current floorspace across the Borough (£5,212 per sq m) and grown this in line with sales density assumptions discussed above. Table 8.5 below summarises forecast global capacity for additional comparison floorspace in the Borough assuming a constant market share approach. As stated above, capacity forecasts over the longer term should be treated with caution.

Table 8.5: Comparison Floorspace Capacity Forecasts (sqm net)

	2019	2024	2029	2034
Floorspace Capacity	2,059	8,307	21,237	31,694

Source: Table 12, Appendix 3

- 8.76 Assuming a constant market share approach, the capacity model indicates that the majority (circa 95%) of this capacity should be directed to Staines town centre. Although we have not identified any specific capacity in Local Centres, this should not prevent an element of additional comparison goods floorspace coming forward in other centres where it reflects their role in the retail hierarchy, is in a town centre location, meets local needs, and qualitatively improves the vitality and viability of these centres. This would also be subject to their physical capacity to accommodate growth, market demand, and

compliance with the relevant policy tests (specifically, the NPPF retail tests) as well as other material considerations.

- 8.77 The role of horticultural/garden centre retailing has not been included – as a separate entity – within the overall assessment of need for additional comparison goods floorspace. If this is deemed to have a major role across the borough, the Council may wish to consider reviewing this sector during an update study.

Summary

Convenience Capacity

- Our analysis shows that within Spelthorne's core zones, the Borough's retention of convenience expenditure has increased significantly since 2004, growing from 60.2% to 77.7%. A large proportion of this increase is driven by the growing popularity of out-of-centre stores. The market shares attributed by Ashford, Shepperton and other local stores in the Borough have also increased since 2004, albeit to a lesser degree.
- The Waitrose in Staines town centre accounts for more than half of all convenience expenditure retained in the town centre and is an important retail anchor. The results of the survey indicate that the store trades around 15% below expected company benchmark levels. Other convenience floorspace in Staines town centre also appear to be trading below expected levels, however this is not uncommon, as surveys do underestimate the performance of city centre 'top up' foodstores, which instead benefit greatly from passing trade from local employees/business, tourists, shoppers and commuters.
- The scale of convenience floorspace in the Local Centres of Ashford, Shepperton and Sunbury Cross is relatively limited. Although the centres include a variety of smaller operators, none of the centres includes a major (circa 1,000 sqm net) foodstore anchor. With respect to market shares, Ashford accounts for the highest proportion of convenience expenditure from Spelthorne's core zones (10.3%), followed by Shepperton (5.3%) and Sunbury Cross (3.3%).
- Out-of-centre foodstores in the Borough are limited to two Tesco Extras at Ashford and Sunbury Cross. The results of the survey indicate that together, these stores account for more than half of the total convenience expenditure retained in the Borough from within Spelthorne's core zones. The Tesco Extra at Ashford is trading almost five times

above expected company benchmark levels, however benefits from an extension which (upon implementation) should help reduce this imbalance. The results of the survey indicate that the Tesco Extra at Sunbury Cross is performing at expected benchmark levels, however as this store is located at the edge of the study area (and will therefore attract an element of expenditure from outside of the study area) it is likely that the model will underestimate the store's performance.

- On the basis of current market shares and forecast growth in population and expenditure, we have identified no residual global capacity to support additional convenience goods floorspace in the Borough until 2034. In total, capacity has been identified for 121 sqm net by 2034. This is due in part to existing commitments in the Borough and in part to the 'under trading' of some of the Borough's stores (and thus their theoretical ability to absorb a proportion of the need arising from population and expenditure growth across the survey area).
- Notwithstanding the above, we consider that there may be qualitative reasons to support the provision of new convenience retail floorspace in defined centres to claw back trade from out of centre stores. Applications for additional floorspace must be tested on a case by case basis taking into account all valid material considerations, including the relevant retail tests set out in the NPPF.

Comparison Capacity

- For comparison goods, our analysis shows that Staines town centre performs very strongly. It achieves the highest level of retention of all the centres (and out-of-centre destinations) in the Borough, which demonstrates the popularity and strength of the centre as a shopping destination.
- Just more than half of Staines' comparison floorspace turnover is derived from residents in Spelthorne's core zones. This indicates that the centre serves a regional role, attracting expenditure from a wide area which extends beyond Borough boundaries.
- Staines town centre's market share from within Spelthorne's core zones has increased over the past ten years, growing from 43.7% in 2004 to 53% in 2014. Overall, we consider that the centre has a high retention rate for comparison goods expenditure. The market share attained by the Local Centres is more limited, and reflects their scale of offer and role in the retail hierarchy.

- We have identified theoretical capacity to support 2,059 sqm of comparison goods floorspace in 2019 (5 years), growing to 8,307 sqm by 2024 (10 years), 21,237 sqm by 2029 (15 years) and 31,694 sqm by 2034 (20 years). Assuming a constant market share approach, the capacity model indicates that the majority of this capacity should be directed to Staines town centre.
- Although we have not identified any specific capacity in Local Centres, this should not prevent an element of additional comparison goods floorspace coming forward in other centres where it reflects their role in the retail hierarchy, is in a town centre location, meets local needs, and qualitatively improves the vitality and viability of these centres. This would also be subject to their physical capacity to accommodate growth, market demand, and compliance with the relevant policy tests (specifically, the NPPF retail tests) as well as other material considerations.

9. Conclusions and Recommendations

- 9.1 Drawing on our qualitative and quantitative analysis this section considers the scope for accommodating new retail development in the Borough. We examine each of the town centres assessed in this report in turn to review the scope for new retail development in these centres over the forthcoming development plan period.
- 9.2 The NPPF advises Councils to plan positively to meet needs arising for town centre uses. Policies should support the vitality and viability of town centres, and allocate a range of suitable sites to meet the scale and type of retail development needed in town centres. This section addresses these requirements and makes recommendations to provide the Council with up to date evidence to prepare suitable town centre strategies for the Borough.

Policy/Market Context

- 9.3 The National Planning Policy Framework (NPPF) was published in March 2012 and replaces the suite of national planning policy statements, including PPS4. The NPPF clearly 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.
- 9.4 The NPPF encourages LPA's to positively seek opportunities to meet the development needs of their area. Where physical capacity is not present in a town centre to meet the level of 'need' identified, local authorities are encouraged to find the most appropriate alternative strategy having regard to the sequential and impact tests.
- 9.5 In terms of the market, economic growth will continue to remain muted over the plan period, with relatively weak expenditure growth in the short-medium term. It is evident that the traditional high street faces a number of challenges, not least from the impacts of the recession, including tightening of retail spending and changing consumer behaviour, but also from increasing competition posed by the internet, multichannel retailing and out of centre developments.
- 9.6 In a positive twist, however, click and collect is now one of the most significant drivers of growth, with evidence demonstrating that these customers visit centres more frequently

and make additional purchases whilst in the shop/town centre. The phenomenon is driving an increase in footfall in our town centres, an outcome being felt by the high street already. Nevertheless, town centre strategies which support the continued evolution of the high street must continue to be prioritised. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade/leisure market, and improving the mix of retail and non-retail outlets to increase length of stay and spend.

- 9.7 It will be important for town centres like Staines to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres. The on-going pattern of polarisation suggests that larger centres are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services.

Staines Town Centre

- 9.8 Staines is the largest town centre in the Borough and performs an important retail function. The centre has a particularly strong comparison goods offer, with the proportion of units occupied by such uses being above the national average. The analysis of shopping patterns demonstrates that Staines, including the Two Rivers shopping centre, has a strong market share in all survey zones, competing effectively as a top destination for all goods types.
- 9.9 In terms of convenience goods, the Waitrose foodstore at Two Rivers performs very well and is a key attractor in the centre, and the M&S store has a popular foodhall, but overall the number of units occupied by convenience goods retailers is particularly limited and well below national average. The town centre has a combined Zone 2 market share of 32.6%, compared to a strong out-of-centre combined market share of 44%.
- 9.10 The detailed analysis demonstrates that whilst the town centre foodstores in Staines town centre are 'key attractors' they do not perform above company average levels. The Waitrose store is perhaps limited by the perception of the Two Rivers car park being at full capacity. In contrast, the Tesco Extra, Ashford is trading five times above company average levels, and the Sainsbury's on The Causeway is also performing above company average levels, although not to the same extent. The Tesco Extra at Sunbury Cross is achieving company average levels based on the Staines catchment alone, but in reality

that store will achieve a much greater turnover arising from inflow from outside the Spelthorne survey area.

- 9.11 Taking into consideration floorspace performance and identified commitments, the expenditure and quantitative floorspace needs assessment identifies no 'baseline' residual expenditure to support further convenience goods floorspace in the Borough over the plan period. Nevertheless, given the overtrading of out-of-centre foodstores and the recommendations in the NPPF we recommend the Council supports proposals or strategies aimed at increasing the town centre convenience goods offer. There is a clear qualitative need in Staines town centre to improve the range and choice of operators, whether that is from multiple or independent businesses. There is no need to identify sites outside of the town centre for foodstore development.
- 9.12 In terms of comparison goods, the town centre comprises three distinct retail areas including Two Rivers, the High Street and Elmsleigh Shopping Centre. The Two Rivers scheme has been a particular success, with Waitrose being a key anchor and footfall on Norris Road – the key link route with the remainder of the main shopping area - being the second highest in the town centre. Following the development of Two Rivers, footfall around Elmsleigh and High Street has remained particularly strong, demonstrating the complementary nature of the different retail areas and the success of the linkages between each one. The main shopping areas function well as one town centre.
- 9.13 The survey results identify a town centre performing well, with a number of key attractors and a good range of town centre attractions. This ensures frequent visits from a loyal customer base that choose to stay in the centre for reasonably lengthy periods of time. Linked trips between these different attractions have been identified, whilst areas for improvement are primarily focused on an improved range/quality of shop.
- 9.14 Across the whole survey area, Staines town centre captures 38.4% of comparison goods trade; and within the core catchment area (Zones 1-6 and 11) the town centre captures 53%. It is evident that trade retention has increased considerably since the 2004 study, and the competition from alternative destinations outside the Borough is relatively limited. From the core catchment area, 13.9% of comparison goods trade is captured by Kingston-upon-Thames, 3.3% travel to Walton-on-Thames, 5.3% goes to the main out-of-centre foodstores located in Spelthorne Borough, and 10.5% goes to Ashford, Shepperton and Sunbury-Cross town centres.

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- 9.15 The evidence demonstrates that Staines town centre is performing adequately, achieving a sales density of around £5,212 per sq m net. This reflects a centre performing well, but we would consider there is 'room for improvement'. Kingston is currently the greatest competitor, and there are plans for redevelopment and enhancement in part of the centre to achieve a stronger and better quality retail mix. In a 'do nothing' scenario, Staines would likely see its market share erode to some extent following this type of development in a key competing centre.
- 9.16 Two Rivers has demonstrated the ability of Staines to offer modern retail formats and to attract new key retailers and leisure operators to the town centre. The offer is currently mass/mid-market, and Staines has the opportunity to build on that success and provide further new, modern accommodation for existing operators and those not yet represented in the town centre. This aspiration has been incorporated in the policy framework for a number of years, and the findings of our study continue to support the general principles and scale of development.
- 9.17 Our quantitative retail needs assessment has identified sufficient residual capacity to support 21,237 sq m net of comparison goods floorspace by 2029. This is consistent with the long term aspiration to extend the Elmsleigh Shopping Centre in Staines town centre (Policy Allocation A10). It should be noted that this is based on a constant market share, and if new town centre development came forward of sufficient scale and quality of offer it would be possible to support additional floorspace over a shorter timescale through an increased market share.
- 9.18 The Elmsleigh Shopping Centre continues to be the main development opportunity in Staines town centre, and the main opportunity to maintain and enhance market share.
- 9.19 In order to accommodate the scale of additional comparison shopping floorspace likely to be required, policy should continue to plan for the intensification of the primary shopping area through the planned extension of the Elmsleigh shopping centre. The site offers the only opportunity to enhance the retail core and to provide space for new retailers and larger floorplates for a better quality of retailer not yet represented in the town centre.
- 9.20 It will be crucial to ensure a comprehensive approach whatever the final scale and composition of development on the Elmsleigh site. Piecemeal development will compromise a much needed comprehensive mixed use scheme necessary to realise the
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full development potential of the site and the significant benefits to Staines town centre. Short term piecemeal decisions should not prejudice the potential of the site in meeting the needs of the town centre as a whole, an outcome which would certainly lead to a 'missed opportunity'.

- 9.21 Given the scale and form of new retail development likely to be needed over the plan period, we consider the Elmsleigh shopping site (Policy Allocation A10) is likely to play a key role in meeting the strategic retail needs of Staines and accommodating other key town centre uses. Due to the strategic importance of the area we recommend the intensification of the site is given appropriate consideration and weight in emerging policy to ensure development of an appropriate scale, mix and quality. We recommend the important relationship between the site and the wider town centre and river frontage is considered in detail in any emerging strategy to ensure optimum physical and visual linkages.
- 9.22 It will be important for an emerging strategy for Staines to be underpinned by a newly defined 'unique selling point' (USP), and we recommend this is based on the towns location on the River Thames, a higher quality retail offer, the more niche role of the market and food retailing, and wider town centre offer around leisure, eating and drinking. The strategy should aim to build on previous successes and inward investment and take the centre to the next level, drawing on the strength of locational characteristics and generally affluent catchment on the edge of Greater London.
- 9.23 Our assessment has identified a limited 'food' offer in Staines town centre, but the role of the market is an important feature of the town centre mix, albeit one that could be much improved. The strategy for Staines should include an aspiration to enhance the 'food' offer in both national multiple and more independent/niche/markets in order to compete with out-of-centre foodstores and to broaden the mix of uses and attraction of the centre to visitors. A diverse, international and high quality food offer can independently become a key attractor.
- 9.24 In terms of the 'need' for new leisure development, the methodologies for quantifying floorspace is not as technically defined or robust compared to the more advanced and tested methods of forecasting retail sales floorspace. Nevertheless, it is possible to provide general qualitative guidance in terms of the need for this type of town centre floorspace through a detailed review of national economic and commercial trends, the usage of

existing facilities drawing on the results of the household telephone and in-centre survey results, and the identification of any gaps in provision. Previous sections have reviewed these variables, and here we conclude the need identified.

- 9.25 Section 3 has identified strong growth in consumer expenditure in the eating/drinking sector over the Plan Period, despite the recession. Published research consistently encourages a mix of uses in a town centre to meet the full shopper experience in order to compete with neighbouring centres and the internet.
- 9.26 Our review of leisure uses has identified a need for Staines to improve the daytime and evening eating/drinking offer to capture lost trade. Within Core Zone 2, for example, the town centre only captures 56.1% of visitors to pubs/clubs, and only 66.5% for restaurants. We believe this figure could be improved in both core and outer zones, through new development and/or change of use, more choice and a better quality of offer.
- 9.27 Development opportunities and a town centre strategy should create a destination of choice for daytime and evening eating/drinking. Opportunities should be identified within Elmsleigh Phase III and secondary shopping frontages within the town centre.
- 9.28 In particular, funds are available to enhance smaller neighbourhoods and sections of larger town centres through, for the example, the Governments Working Neighbourhoods Fund. Such a scheme, focusing on aesthetics, could substantially enhance the attraction of more secondary areas in Staines. The Council may wish to also consider the ability to merge units on High Street East (secondary) and Clarence Street/Church Street (secondary) to create larger floorplates in order to attract higher quality restaurant operators.
- 9.29 The results of the household telephone survey demonstrate very little competition between Staines and Kingston-upon-Thames for leisure uses in the core catchment area, highlighting further the opportunity for Staines to enhance market share. The strongest competitor in Core Zone 2 for pubs/clubs is Laleham Village Centre (13.1%), and the strongest for restaurants is Windsor (8%) and Laleham Village Centre (4.5%). There is a high level of leakage to 'other' town centres which could be consolidated and drawn to Staines through an improved offer.
- 9.30 'Other' leisure uses in Spelthorne borough include just the Vue Cinema at the Two Rivers scheme in Staines town centre. Our assessment has identified a general qualitative need

for other uses on the basis that there are no bowling, bingo, ice skating, theatre or family entertainment venues in the borough. The strategy for Staines should include an aspiration/opportunity for this type of use if the sites are available, to enhance visitation rates and linked trips to shopping and eating/drinking facilities. Provided policy ensures flexibility for such uses as an 'option', the deliverability will ultimately be decided by commercial demand factors.

- 9.31 The recommended strategy for Staines has identified the need for new retail floorspace, enhanced eating/drinking, an improved convenience foodstore/market offer, a possible commercial family entertainment destination, and the importance of promoting the river frontage as a key destination and part of the wider town centre offer. These themes and opportunities will be supported by a more vibrant town centre environment as planned new housing is considered a key part of town centre development opportunities, including Elmsleigh and the Bridge Street Car Park.
- 9.32 The strategy for Staines should be underpinned and driven by improved linkages from the River Thames through to the town centre, focusing on routes through the Riverside Car Park site, and through to Clarence Street, Elmsleigh Phase III (southern extension), and the High Street. Such linkages should be viewed as a priority in policy formulation which will ensure a step change in the perception, usage and attraction of the centre.
- 9.33 We recommend against large-scale and dense river frontage development which would have the effect of cutting off the river from the town centre, thereby missing the opportunity to maximise this key asset and opportunity. Visual linkages are equally as important as physical pedestrian linkages. The opportunities for visual and physical integration from the river to the main shopping area are greater than that achieved in Kingston-upon-Thames.
- 9.34 In terms of frontage and boundary policies, the Local Plan should clearly identify the following areas in accordance with the definitions set out in Annex 2 of the NPPF:
- [Town Centre Boundary](#);
 - [Primary Shopping Area](#);
 - [Primary Shopping Frontage](#);
 - [Secondary Shopping Frontage](#).

9.35 Based on our review of the retail/town centre composition and pedestrian footfall, we consider the Primary and Secondary frontages remain relevant and should be retained as currently allocated. No substantial change or development has taken place in the centre that would indicate a shift in activity and provide justification for revised frontages. This policy position does not preclude future development, and new opportunities for town centre expansion/change should be encouraged through separate site specific policies. In the meantime, before change takes place, appropriately defined frontages and boundaries should reflect the 'current' context to enable continued development control across the town centre.

Ashford Town Centre

9.36 Ashford town centre appears to be healthy and performing its local centre role as envisaged in the Core Strategy. As you might expect, the service offer is above national average providing a good range of banks, building societies, cafes and health and beauty shops. The convenience offer is in line with the national average, and includes a Tesco Express, Sainsbury's Local and a Londis store – all top up destinations.

9.37 Comparison uses are below the national average and include charity shops, hardware shops, household goods and carpets, for example. There is little representation of clothing and footwear retailers, but again this is to be expected in a small, local centre. Non-retail uses, including Brooklands College which is a good driver of footfall in the town centre, and vacant units remain low with no clusters identified.

9.38 Convenience goods floorspace has a strong market share in Core Zone 3, competing effectively with out-of-centre main foodstores. Comparison goods market shares are reasonable with an 11.9% market share in Core Zone 3, and trade draw from neighbouring Zones 4 and 11.

9.39 The results of the survey reflect a strong and healthy centre with the key anchor being the convenience goods offer, followed by reasonably strong comparison and service sectors. Linked trips have been identified, and over half of visitors stay for between 30 minutes and 2 hours. The key attractions of the centre are the compact nature of the shopping streets, ease of access by foot/cycle, eating/drinking provision and the good range of independent retailers.

Shepperton Town Centre

- 9.40 Shepperton town centre has an attractive environment, mature tree planting and a good mix of multiple retailers and smaller niche/boutique independent retailers. Visitors to the centre and the local catchment are positive in their attitudes towards the centre which they feel is friendly and pleasant with a village atmosphere.
- 9.41 The centre has a strong convenience goods offer, and as you might expect in a local centre this is the key driver for visitors. Budgens is the key attractor in the centre, and together with other convenience goods floorspace, has a Zone 6 market share of 33.2%. This compares reasonably well with the out-of-centre Tesco Extra at Sunbury Cross which has a market share of 26%. Clearly, there should be aspirations to increase the market share of the town centre which underpins its vitality and viability; this will be achieved now that the BP station has been redeveloped to include an M&S Simply Food offer.
- 9.42 The comparison goods mix is strong with a range of everyday comparison multiples, and a good mix of independent niche/boutique retailers. The visitor experience is enhanced with a good mix of cafes, financial and other services, and free on-street parking for up to 3 hours. Vacant units remain particularly low, and overall we conclude that the centre is performing well and is healthy.

Sunbury Cross Town Centre

- 9.43 Sunbury Cross town centre is intersected by the A308, with a more traditional parade of shops on one side, and a concrete, purpose built parade/shopping centre on the south side. Linkages are via under-passes and road traffic crossings. The centre has no soft landscaping and is dominated by the main road network, but investment in the public realm is evident at the parade of shops, with new paving, seating and cycle parking.
- 9.44 Convenience floorspace underpins the health of the centre with M&S being the key attractor, supplemented with Costcutter, Farmfoods and Boots. Shopping patterns in this catchment are dominated by the nearby Tesco Extra which has a market share of 60.2% in Zone 4 and 56% in Zone 5. Other units provide important everyday 'top up' facilities and goods, as well as a reasonable range of cafes/coffee shops.

Attitudinal responses suggest an absence in customer loyalty or ownership of centre with 48% stating that they liked 'nothing' about the centre, and disliked the state of the environment and security/vandals. Shoppers wished to see a better choice of shops, an improved environment and security/CCTV. Overall, Sunbury Cross provides important everyday facilities, but offers a limited range of retail and town centre facilities, visited by people due to 'convenience' rather than 'choice'. This creates a vulnerable position if nearby competition were to be increased.