Nathaniel Lichfield and Partners

Planning Design Economics

LONDON BOROUGH OF MERTON

TOWN CENTRE STUDY UPDATE

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Nathaniel Lichfield & Partners Ltd
14 Regent's Wharf
All Saints Street
London N1 9RL

T 020 7837 4477
F 020 7837 2277
london@nlpplanning.com
www.nlpplanning.com

Offices also in:
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CONTENTS

APPENDICES

1.0 INTRODUCTION

The Study

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by the London Borough of Merton to prepare a Borough wide town centres study in 2005. The report was completed in September 2005, as is referred to as the 2005 Study in this document. The 2005 Study included an analysis of the four main retail centres, namely Wimbledon, Morden, Mitcham and Colliers Wood.

1.2 This report provides an update of the retail capacity projections in the 2005 Study based on the latest available information e.g. the GLA population projections, expenditure data and turnover densities. This update report should be read along side the 2005 report.

1.3 This update forms part of the evidence base for the Merton Local Development Framework. It has been prepared in accordance with PPS6 'Planning for Town Centres.

1.4 In addition to updating the retail capacity projections, this report examines the strategic development options for Colliers Wood, in the light of proposals now under construction to provide a large Mark & Spencer store in part of the Sainsbury premises. The report assess whether the future of Colliers Wood would be better managed by its re-designated as a town centre in the LDF Core Strategy, or whether the existing non-town centre designation should be retained. The impact of this potential re-designation on other designated centres has been assessed.

1.5 Merton Council has commissioned Urban Initiatives to prepare a separate study which looks at opportunities within the Colliers Wood area.

2.0 THE SHOPPING HIERARCHY

The London Plan

2.1 The South London Sub-Regional Development Framework (SRDF) was available only in draft form when the previous 2005 Study was prepared. The final South London SRDF was published in May 2006.

2.2 The alterations to the London Plan and the South London SRDF propose no amendments to the previous London Plan designation of centres within Merton. Wimbledon continues to be classified as a *Major Centre* and Mitcham and Morden are designated as *District Centres.* Colliers Wood is not classified in the London Plan hierarchy of centres. Local centres or parades are not identified at this strategic level.

Major Centres in Merton and Surrounding Areas

2.3 The 2005 Study assessed the hierarchy of centres based Management Horizons UK Shopping Index for 2003/2004. Venuescore's UK Shopping Index 2006 provides a more up to date index of shopping centres, based on a similar weighted scoring system for multiple retailers represented in each centre. Venuescore's rank for centres in the Borough and other shopping centres in the sub-region are shown in Table 2.1.

2.4 The changes in rank should be treated with caution, particularly in relation to smaller centres, because the scoring systems adopted and the number of centres included by Venuescore and Management Horizons are different. In relation to smaller centres a slight change in the score can result in a significant change in rank because large numbers of centres have the same score at the bottom end of the hierarchy of centres.

2.5 The changes in scores and rank for Colliers Wood also need to be treated with care, because it is unclear what is included or excluded from the two surveys. Venuescore includes scores for three separate areas in the Colliers Wood area, i.e. Merton, Colliers Wood/Merton and Priory Retail Park. The combined Venuescore for all three areas would be 39, which would suggest a rank of 618th, similar to Mitcham's Venuescore and rank, and a rank above Morden.

2.6 The Venuescore data confirms that Wimbledon remains at the top of hierarchy in the Borough, some way ahead of Mitcham and Morden.

Table 2.1 Venuescore Shopping Index (2006)

Venue	Venuescore Index	Venuescore Rank 2006	MH Rank 2003/2004	Change from 2003/2004
Oxford Street	297	11	9	-2
Kingston Upon Thames	264	16	16	0
Croydon	228	27	30	+2
Sutton	164	80	70	-10
Wimbledon	**151**	**101**	**115**	**+14**
Richmond Upon Thames	118	166	165	-1
Putney	107	196	183	-13
Clapham Junction	92	232	262	+30
Tooting	76	297	307	+10
Wandsworth	72	315	435	+120
Streatham	68	330	351	+21
Brixton	61	387	452	+65
Mitcham	**40**	**593**	**589**	**-4**
New Malden	38	633	649	+16
Balham	37	650	635	-15
Morden	**28**	**850**	**863**	**+13**
Clapham High St	20	1,173	1,120	-53
Raynes Park	**18**	**1,290**	**1,268**	**-22**
Carshalton	17	1,357	1,194	-163
Wimbledon Village	**17**	**1,357**	**n/a**	**n/a**
Merton	**17**	**1,357**	**1,194**	**-163**
Colliers Wood	**12**	**1,818**	**1,268**	**-550**
Priory Retail Park	**10**	**2,071**	**n/a**	**n/a**

Source: Venuescore (2006) and management Horizons 2003/2004

3.0 ACCOMMODATING GROWTH - OPTION ANALYSIS

Introduction

3.1 The quantitative scope for new retail floorspace in Merton Borough during the period 2008 to 2021 has been reassessed and the capacity analysis is set out in the Appendices to this report. Appendix D sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. The analysis also assesses the implications of the proposed Marks & Spencer store in Colliers Wood and the effects this store could have on retail capacity within other centres.

3.2 The implications of emerging development options identified within the Urban Initiatives study of Colliers Wood have been assessed in the context of the revised retail capacity figures.

Retail Capacity Summary

Convenience Retail Facilities

3.3 Overall convenience retail sales floorspace within Merton are estimated to be trading very healthily in 2008, significantly above the benchmark turnover level (+£49.79 million). The main changes affecting future convenience market shares is the proposed implementation of the Tesco food store in Streatham and the proposed food hall within the Marks & Spencer store at Colliers Wood.

3.4 The surplus expenditure figures indicate that further convenience retail development could be supported in Merton Borough, taking into account the proposed Tesco commitment in Streatham and the new Marks & Spencer food hall in Colliers Wood. The sales floorspace projections at the bottom of Table 10B Appendix B, suggest that about 5,300 sq m net of food store floorspace could be accommodated in the Borough by 2016 and about 2,900 sq m net in smaller stores/shops, or about 8,200 sq m net in total.

Comparison Retail Facilities

3.5 Comparison retail sales floorspace within Merton appears to be trading healthily in 2008, around the adopted benchmark turnover level.

3.6 The proposed Marks & Spencer store is expected to provide about 8,000 sq m net of comparison sales floorspace (excluding the food hall area), with a total turnover of £40.3 million.

3.7 These surplus expenditure figures indicate that further comparison floorspace development can be supported in the Borough in the short to medium term. The floorspace projections in Table 8C Appendix C, suggest that about 16,500 sq m net (23,600 sq m gross) could be accommodated in the Borough by 2016, increasing to 28,100 sq m net (40,100 sq m gross) by 2021.

Impact of the Mark & Spencer Store at Colliers Wood

3.8 The cumulative impact of the Marks & Spencer food hall and the proposed Tesco store at Streatham on Wimbledon, Mitcham and Morden will largely be offset by convenience expenditure growth between 2008 and 2011, and should not harm the commercial viability of food store in these centres.

3.9 The impact of the comparison floorspace within the Marks & Spencer store on Wimbledon, Mitcham and Morden will again be more than offset by comparison expenditure growth between 2008 and 2011, and the Marks & Spencer store should not harm the commercial viability of any other centres. Comparison trade diversion will be spread amongst a large number of shopping destinations.

Meeting Shopping Needs in Merton

3.10 Growth in expenditure should provide opportunities to improve the range and quality of shopping facilities within the Borough. In order to meet projected growth in expenditure, there is a need for additional convenience and comparison shopping facilities, over and above existing commitments (including the Marks and Spencer store at Colliers Wood .

3.11 PPS6 indicates that local planning authorities should assess need for additional floorspace over the plan period, and for five year periods within it. PPS6 goes on to indicate that in planning for growth in their town centres, local planning authorities should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan documents, although for large town centre schemes a longer period may be appropriate to allow for site assembly.

3.12 For current development control purposes the projections up to 2011 provide a basis for considering applications in the short term, i.e. emerging schemes during 2008/09. For future planning policy and site allocations in the LDF it is necessary to seek to identify opportunities to accommodate growth at least up to 2016 in order to allow time for the LDF process. However, the longer term growth projections between 2016 and 2021 should be monitored and updated as necessary.

Convenience Development

3.13 The revised 2005 Study suggested there could be scope for about 8,700 sq m net of additional convenience sales floorspace in the Borough as a whole by 2016. The revised projections are very similar 8,200 sq m net. Based on existing shopping patterns this floorspace projection could be distributed as follows:

•	Wimbledon	-	3,100 sq m net
•	Mitcham	-	700 sq m net
•	Morden	-	500 sq m net
•	Colliers Wood	-	400 sq m net
•	Elsewhere in Merton	-	3,500 sq m net
	Total		**8,200 sq m net**

3.14 Subject to the availability of development sites there could be scope to redistribute these floorspace projections. In terms of the type of new facilities about 5,300 sq m net could be provided in large food stores (over 200 sq m net) and the remainder (2,900 sq m net) could be accommodated in small stores/shop units.

3.15 As indicated in the 2005 Study, the main area of qualitative deficiency in food store provision is in the Mitcham area of the Borough. If the proposed redevelopment at Mitcham includes a large Asda store then some of the global floorspace capacity within the Borough could be redistributed to Mitcham.

3.16 An Asda food store of 7,000 sq m gross could have a sales floorspace of at least 4,500 sq m net, of which about 3,000 sq m net could be devoted to the sale of convenience goods. The convenience turnover of this store could be about £40 million, or an additional convenience goods turnover of about £32 million if the loss of the existing Somerfield store is taken into account. If implemented the Asda store would absorb about 45% of the projected surplus convenience expenditure projection at 2016 (£32 million out of £70.7 million). Over and above this proposed development, there could still be scope for over 5,000 sq m net elsewhere in the Borough by 2016.

3.17 In terms of existing shopping patterns a significant element of this remaining floorspace projection (about 3,100 sq m net) could be accommodated in the Wimbledon area. However if there are no suitable sites available for food store development in Wimbledon town centre then some of this capacity could be transferred to other centres in the Borough, where the catchment areas overlap, e.g. Colliers Wood or Morden. Wimbledon's convenience catchment area extends to the north of the Borough and it is unlikely that all of this floorspace capacity can be transferred to other centres in the Borough. Nevertheless there could be scope for a further large food store in either Colliers Wood or Morden, if there are no suitable sites within or on the edge of Wimbledon town centre.

Comparison Development

3.18 The 2005 Study suggested there could be scope for about 30,300 sq m gross of additional comparison retail floorspace in the Borough's town and local centres by 2016, and a further 19,600 sq m gross of retail warehouse floorspace. The revised projection is much lower (23,600 sq m gross) for the reasons outlined in Appendix D. Based on projected shopping patterns (allowing for the uplift in Colliers Woods market share due to the new M&S store) this floorspace projection could be distributed as follows:

- Wimbledon - 6,500 sq m gross
- Mitcham - 1,500 sq m gross
- Morden - 2,400 sq m gross
- Colliers Wood - 8,500 sq m gross
- Elsewhere in Merton - 4,700 sq m gross

Total **23,600 sq m gross**

3.19 Again, subject to the availability of development sites there could be scope to redistribute these floorspace projections. The projection for Colliers Wood assumes that the uplift in market share generated by the proposed Marks & Spencer at 2011 will be maintained up to 2016, and it assumes that other retail facilities in this area (including Priory Retail Park and the Tandem Centre) will also maintain their market share of comparison expenditure up to 2016. The Council will need to assess whether this growth up to 2016 should be accommodated at Colliers Wood, or whether it should be redirected to other centres i.e. Wimbledon, Mitcham and Morden.

3.20 If redevelopment proposals in either Mitcham or Morden exceed the floorspace projections shown above (1,500 and 2,400 sq m gross), then some of the Colliers Wood projection could be redistributed to these two centres.

Emerging Development Options for Colliers Wood

3.21 Urban Initiatives (UI) has identified three broad options or phases of development that could be implemented in Colliers Wood. These options are designed to better integrate existing retail uses within the Colliers Wood area, in order to create a more coherent centre.

Option 1 (Phase 1)

3.22 Option 1 (or phase 1) focuses on strengthening the route between the underground station and the Tandem Centre, along the alignment of Christchurch Road, and a new north-south route cutting through the Priory Retail Park site. This option will therefore involve the rationalisation of the highway network, redevelopment of the Priory Retail Park and the Brown & Root Tower site, in order to provide active retail/service frontages linking the station and existing retail/services on Colliers Wood High Street to the Tandem Centre. This option only provides an active frontage on the west side of Christchurch Road, and therefore properties on the east side would not need to be acquired in this first phase.

3.23 Linkages to the Sainsbury/M&S stores are expected to be improved through the creation of a new park and water feature on area currently occupied by the Priory Road Retail Park. The redevelopment of the Brown & Root Tower site could potentially come forward as the first step in this option.

3.24 The redevelopment of the Priory Retail Park (including Carphone Warehouse) will involve the demolition of about 6,500 sq m gross of existing comparison retail floorspace, plus a fast food outlet (about 300 sq m gross) and a leisure unit (about 500 sq m gross). In total commercial floorspace of about 7,300 sq m gross would need to be acquired and demolished to enable higher density redevelopment.

3.25 The development area identified by Urban Initiatives in this phase is approximately 2 hectares, which based on site coverage of between 40% and 60%, could accommodate between 8,000 to 12,000 sq m gross of retail/commercial use at ground floor level. Up to 3-4 storeys of residential development could be provided above (over 250 units). The net gain in retail/commercial floorspace in this first phase could be up to about 5,000 sq m gross.

Option 2 (Phase 2)

3.26 The second phase extends Option 1 to the north and south. It proposes the relocation of a large retail store to a new position opposite the Tandem Centre, where it would be integrated with this retail development. This would involve the acquisition of new units (totalling about 1,000 sq m gross) recently developed as part of an extension to the Tandem Centre, currently occupied by Nandos, Starbucks, Frankie & Jerrys, Coral Bookmakers and Jessops. High density development would be required to make this viable, perhaps with under-croft or multi-level car parking. This site is approximately 0.6ha and based on a development density of around 60% could accommodate about 3,500 sq m gross of retail/commercial use at ground floor level, or 7,000 sq m gross on two floors, a net gain of between 2,500 to 6,000 sq m gross. Up to 3 storeys of residential development could be provided above.

3.27 Option 2 also involves the creation of active frontages on both sides of Christchurch Road, which would involve the acquisition and redevelopment of residential properties and possibly the church on the east side (i.e. between South Gardens and Fortescue Road). Thames Water's property holdings between Fortescue Road and the Tandem Centre would also need to be acquired. The distance between South Gardens and the Tandem Centre is approximately 300 metres. If an active commercial frontage is provided along this entire route, and the average depth of development is about 20 metres, then this area could accommodate up to 6,000 sq m gross of retail/commercial use at ground floor level.

3.28 Option 2 also involves intensification and improvement to the strip of retail uses currently opposite the underground station alongside Wandle Park running up to Byegrove Road. This could improve the active frontage on the north side of Colliers Wood High Street. This could potentially be implemented in isolation from other development area shown in this option.

3.29 The distance between Wandle Park and Byegrove Road is approximately 250 metres. If commercial uses are provided along this entire frontage, and the average depth of development is about 20 metres (suitable for traditional high street type shop units), then this area could accommodate up to 5,000 sq m gross of retail/commercial use at ground floor level, although the net gain in floorspace would be less than this allowing for the loss of existing uses. A net gain of up to 4,000 sq m gross could be assumed.

3.30 In total Phase 2 along with Phase 1 could deliver a net increase in retail/commercial floorspace of up to 21,000 sq m gross, broken down as follows:

Phase 1

- Priory RP/Brown& Root Tower Area = 5,000 sq m gross;

Phase 2

- Land opposite Tandem Centre = 6,000 sq m gross;
- Christchurch Road (east side) = 6,000 sq m gross;
- Colliers Wood High Street (north side) = 4,000 sq m gross.

Option 3 (Phase 3)

3.31 The third option proposes the relocation existing retail stores (Sainsbury and Marks & Spencer) into the development area between the Station and the Tandem Centre. The area currently occupied by Sainsbury and M&S would then be redeveloped for a primarily residential led development with the potential for incorporating other supporting mixed use facilities. This option also proposes the expansion of Abbey Mills into the industrial area.

3.32 The existing Sainsbury (6,000 sq m net) and Marks & Spencer (9,500 sq m net) stores have a combined net sales area of about 15,500 sq m net and the existing building is over 20,000 sq m gross. It may be difficult to accommodate these two stores within the Phase 1 and 2 development areas as identified by UI, unless the two stores are reduced in size. In our view this phase should only be considered as long term opportunity, if and when Sainsbury and M&S chose to rationalise their stores in Colliers Wood. The redevelopment of their existing stores on site to provide more modern accommodation with better linkages to the rest of the centre may be more realistic.

Retail Capacity Implications

3.33 The comparison and convenience retail floorspace capacity projections for Colliers Wood in this section suggest that the maximum additional floorspace delivered by Phase 1 (up to 5,000 sq m gross increase) could be implemented in the period 2011 to 2016. An element of Phase 2 could also be implemented before 2016, say at least an additional 5,000 sq m gross, or up to 10,000 sq m gross in total, for example the east side of Christchurch Road or the Tandem Centre front site.

3.34 Some of the remaining elements of Phase 2 could be implemented in the period 2016 to 2021. The retail capacity projections suggest up to about 15,500 sq m gross could be provided in Colliers Wood by 2021, excluding Class A2 to A5 uses and other non-retail uses. Allowing for Class A2 to A3 and non-retail uses, the capacity projections suggest that both Phase 1 and Phase 2 (total maximum floorspace of up to 21,000 sq m gross) could be achieved by 2021, without harming other centres.

4.0 IMPLICATIONS FOR COLLIERS WOOD'S DESIGNATION

The Existing Centre

4.1 Colliers Wood Urban Centre, as defined in on the UDP inset plan, contains over 100 retail/service units (Class A1 to A5), including outlets within the Tandem Centre and Priory Retail Park, the Sainsbury store and a number of separate neighbourhood parades on Colliers Wood High Street and Merton High Street. The existing retail sales floorspace (comparison and convenience) is over 30,000 sq m net (including M&S).

4.2 The 2005 study identified poor pedestrian linkages between Colliers Wood High Street, the Sainsbury store and Priory Retail Park and the Tandem Centre. The study concluded that shops and services within Colliers Wood Urban Centre do not provide a single shopping destination, due to the 1.4 kilometre length of the centre and the significant breaks in the shop frontages and poor pedestrian linkages.

4.3 UI's Phase 1 could significantly improve pedestrian linkages between these areas. In particular the provision of continuous active frontages between Colliers Wood High Street/the Station and the Tandem Centre could provide a relatively compact centre. The Tandem Centre is approximately 500 metres from the Station which is a reasonable walking distance for customers if active frontages are provided on this route to draw customers between the two areas. Improved pedestrian linkages to the Sainsbury/M&S stores, facilitated by the redevelopment of the Priory Retail Park and Brown & Root Tower, would also assist in creating a more compact centre.

4.4 UI Option (phase 1) proposals (8,000 to 12,000 sq m gross commercial floorspace) in combination with the Tandem Centre, Sainsbury/M&S and existing shop units on Colliers Wood High Street and Christchurch Street could create a centre with over 40,000 sq m gross floorspace. Based on the London Plan's shopping centre designations this amount of floorspace would be more than sufficient to warrant a *District Centre* designation, but it may fall short of the a *Major Centre* designation. The London Plan suggests *Major Centres* will normally have over 50,000 sq m gross of retail floorspace.

4.5 The implementation of UI's Phase 1 and some or all of Phase 2, could create a centre with over 50,000 sq m gross. If these phases of development are implemented then Colliers Wood could be reclassified as a *Major Centre*.

Appendix A

Study Area and Existing Retail Facilities

Table 1A - Convenience Shopping Facilities in LB of Merton - Benchmark Turnover (2006 prices)

Centre/Store	Net Sales Floorspace Sq M	Convenience Sales Floorspace %	Convenience Floorspace Sq M Net	Turnover Density £ per Sq M	Total Convenience Turnover £M
Wimbledon Town Centre					
Morrisons, The Broadway	1,979	95%	1,880	£9,549	£17.95
Sainsbury's, Worple Road	1,595	95%	1,515	£9,221	£13.97
Tesco Metro, Old Town Hall	982	95%	933	£13,145	£12.26
Marks and Spencer, Centre Court	836	95%	794	£11,077	£8.80
Other convenience shops in Wimbledon	1,900	100%	1,900	£4,000	£7.60
Sub-Total	**7,292**		**7,022**	**£8,627**	**£60.59**
Mitcham Town Centre					
Somerfield, St Marks Road	1,645	80%	1,316	£5,935	£7.81
Netto, Western Road	672	93%	625	£2,758	£1.72
Iceland, Upper Green West	434	90%	391	£4,864	£1.90
Tesco Express, London Road	250	98%	245	£13,145	£3.22
Other convenience shops in Mitcham	1,700	100%	1,700	£4,000	£6.80
Sub-Total	**4,701**		**4,277**	**£5,017**	**£21.45**
Morden Town Centre					
Sainsbury, London Road	1,942	98%	1,903	£9,221	£17.55
Iceland, Aberconway Road	385	100%	385	£4,864	£1.87
Lidl, Aberconway Road	756	80%	605	£2,802	£1.69
Other convenience shops in Morden	1,000	100%	1,000	£4,000	£4.00
Sub-Total	**4,083**		**3,893**	**£6,452**	**£25.12**
Colliers Wood Urban Centre					
Sainsburys, Merton High St (reconfigured)	6,000	70%	4,200	£9,221	£38.73
Marks & Spencer Food Hall (proposed)	1,500	100%	1,500	£11,077	£16.62
Tesco Express, High St	210	98%	206	£13,461	£2.77
Other convenience shops in Colliers Wood	700	100%	700	£4,000	£2.80
Sub-Total	**8,410**		**6,606**	**£9,221**	**£60.91**
Other Large Stores in LB of Merton					
Tesco Extra, Beverley Way, New Malden	7,034	60%	4,220	£13,145	£55.48
Tesco Express, Merton Road, South Wimbledon	238	98%	233	£13,145	£3.07
Tesco Express, Wimbledon Village	200	98%	196	£13,145	£2.58
Co-op, Kingston Road, Wimbledon Chase	317	100%	317	£5,343	£1.69
Co-op, Mitcham Road, North Mitcham	392	100%	392	£5,343	£2.09
Lidl, Mitcham	1,200	80%	960	£2,802	£2.69
Lidl, London Road, North Mitcham	560	90%	504	£2,802	£1.41
Somerfield, Haydons Road, Wimbledon	105	100%	105	£5,935	£0.62
Somerfield, Wimbledon Park Road	210	100%	210	£5,935	£1.25
Sub-Total	**10,256**		**7,138**	**£9,930**	**£70.88**
Local Facilities					
Local Centres	3,100	100%	3,100	£4,000	£12.40
Other local shops	5,000	100%	5,000	£4,000	£20.00
Sub-Total	**8,100**		**8,100**	**£4,000**	**£32.40**
MERTON GRAND TOTAL	**42,842**		**37,035**	**£7,327**	**£271.35**
	Comparison Sales Floorspace in Food Stores Sq M Net				**5,807**

Sources: IGD Food Store Directory
Experian Goad
NLP Site Surveys 2005/2008
Verdict Report on Grocery Retailers 2007

Table 2A - Comparison Floorspace and Benchmark Turnover in LB of Merton

Centre	Store	Gross Floorspace Sq M	Net Sales Floorspace Sq M	Turnover Density £ psm	Benchmark Turnover £M
Wimbledon	Town centre comparison shops	34,150	23,900	7,000	167.30
	B&Q Supercentre, Alexandra Road	3,430	3,087	2,011	6.21
	Sainsbury's, Worple Road	n/a	99	6,896	0.68
	Tesco Metro, Old Town Hall	n/a	80	7,821	0.62
	Marks and Spencer, Centre Court	n/a	49	5,038	0.25
	Sub-Total	**34,150**	**27,215**	**6,433**	**175.06**
Mitcham	Town Centre comparison shops	6,350	4,445	4,000	17.78
	Dreams Beds, London Road	1,500	1,200	1,632	1.96
	Somerfield, St Marks Road	n/a	329	3,437	1.13
	Netto, Western Road	n/a	47	5,605	0.26
	Iceland, Upper Green West	n/a	43	2,723	0.12
	Tesco Express, London Road	n/a	5	7,821	0.04
	Sub-Total	**7,850**	**6,069**	**3,508**	**21.29**
Morden	Town Centre comparison shops	6,030	4,221	4,000	16.88
	Sainsbury, London Road	n/a	39	6,896	0.27
	Lidl, Aberconway Road	n/a	151	2,723	0.41
	Sub-Total	**6,030**	**4,411**	**3,982**	**17.56**
Colliers Wood	TK Maxx, Tandem Centre	2,000	1,600	2,674	4.28
	JJB Sports Tandem Centre	1,500	1,275	2,188	2.79
	JD Sports, Tandem Centre	600	510	2,000	1.02
	WH Smith, Tandem Centre	500	425	5,552	2.36
	Clarks, Tandem Centre	500	425	10,076	4.28
	Next, Tandem Centre	1,000	850	7,192	6.11
	Sports Direct, Tandem Centre	970	825	2,000	1.65
	Argos, Tandem Centre	1,200	480	n/a	7.31
	Boots, Tandem Centre	1,600	1,360	8,021	10.91
	Jessops, Tandem Centre	200	170	6,000	1.02
	Harveys/Benson Beds, Priory Retail Park	1,750	1,488	1,859	2.77
	PC World, Priory Retail Park	1,860	1,488	7,285	10.84
	The Sleep Depot, Priory Retail Park	940	799	1,500	1.20
	Carphone Warehouse, Priory Retail Park	280	238	n/a	2.06
	Currys, Priory Retail Park	1,620	1,296	5,755	7.46
	Marks & Spencer (proposed)	n/a	8,000	5,038	40.30
	1-11 High Street Colliers Wood (proposed)	460	320	4,000	1.28
	Sainsbury comparison floorspace (reconfigured)	n/a	1,800	6,896	12.41
	Tesco Express- comparison floorspace	n/a	4	7,821	0.03
	Urban Centre comparison shops	3,580	2,506	4,000	10.02
	Sub-Total	**n/a**	**25,858**	**5,032**	**130.11**
Raynes Park	DFS	1,800	1,530	6,071	9.29
Out-of-Centre	Harveys	690	587	1,859	1.09
	Carpet Right	900	765	1,315	1.01
	Comet	550	440	7,032	3.09
	B&Q, Supercentre, Shannon Corner	4,020	3,618	2,011	7.28
	Topps Tiles	760	646	1,758	1.14
	Pets at Home	2,410	2,049	2,000	4.10
	Halfords	1,350	1,148	2,327	2.67
	Tesco Extra, Beverley Way, New Malden	n/a	2,814	7,821	22.01
	4 Retail Units, Burlington Road (proposed)	322	225	3,500	0.79
	B&Q, Burlington Road (proposed)	n/a	10,600	2,011	21.32
	Sub-Total	**n/a**	**24,420**	**3,021**	**73.77**
Other Merton	Homebase, Weir Road	3,030	2,727	1,568	4.28
	Allied Carpets, Plough Lane	830	706	1,404	0.99
	Carpetright, Plough Lane	900	765	1,315	1.01
	Wickes, Plough Lane	3,270	2,943	2,466	7.26
	MFI, Plough Lane	1,770	1,505	2,403	3.62
	Currys, Plough Lane	1,430	1,144	5,755	6.58
	Wickes, Lee Road	1,810	1,629	2,466	4.02
	Homebase, Lee Road	2,670	2,403	1,568	3.77
	Homestore (discount store), Jubilee Way	2,120	1,802	1,500	2.70
	Staples, Nelson Industrial Estate	1,420	1,207	2,011	2.43
	Topps Tiles, Puma Trade Park	410	349	1,758	0.61
	Tesco Express, Merton Road, South Wimbledon	n/a	5	7,821	0.04
	Tesco Express, Wimbledon Village	n/a	4	7,821	0.03
	Lidl, Mitcham	n/a	240	2,723	0.65
	Lidl, London Road, North Mitcham	n/a	56	2,723	0.15
	Other local shops	14,500	10,100	3,500	35.35
	Sub-Total	**n/a**	**27,583**	**2,664**	**73.48**
GRAND TOTAL	**Existing**	**n/a**	**96,412**	**4,435**	**427.58**
GRAND TOTAL	**Proposed**	**n/a**	**19,145**	**3,327**	**63.69**

Sources: NLP Site Surveys 2005/2008, Experian Goad and VOA, Table 1A and London Borough of Merton

Appendix B

Convenience Retail Assessment

Table 1B : Population Projections

Catchment Area	2001	2005	2008	2011	2016	2021
1 - Wimbledon West	28,957	29,623	32,418	34,475	34,425	35,251
2 - East Wimbledon/Colliers	43,747	44,367	45,570	46,458	47,064	47,751
3 - Raynes Park	27,789	27,756	28,005	28,153	28,115	28,243
4 - North Sutton	47,214	47,190	47,127	47,275	47,009	46,954
5 - Tooting	55,981	57,023	57,379	57,894	58,702	59,610
6 - East Kingston	14,523	14,479	14,457	14,458	14,368	14,340
7 - Mitcham	54,625	54,612	54,864	55,597	55,478	55,537
8 - Streatham	37,892	38,468	38,801	39,120	39,779	40,399
9 - Balham/Clapham	48,730	49,484	50,204	51,336	51,627	52,067
10 - Wandsworth	41,094	42,263	43,024	43,162	43,917	44,900
	400,552	**405,265**	**411,849**	**417,928**	**420,484**	**425,052**

Sources: *Experian 2001 Census Population*
GLA Post Lonodn Plan ward level projections (low growth)

Table 2B: Convenience Goods Expenditure Per Capita (2006 Prices)

Expenditure Per Capita	2008	2011	2016	2021	Growth 2008-2011	Growth 2008-2016	Growth 2008-2020
1 - Wimbledon West	£1,917	£1,950	£2,037	£2,120	1.7%	6.3%	10.6%
2 - East Wimbledon/Colliers Wood	£1,852	£1,884	£1,968	£2,048	1.7%	6.3%	10.6%
3 - Raynes Park	£1,943	£1,976	£2,064	£2,148	1.7%	6.2%	10.6%
4 - North Sutton	£1,654	£1,682	£1,757	£1,828	1.7%	6.2%	10.5%
5 - Tooting	£1,615	£1,642	£1,716	£1,786	1.7%	6.3%	10.6%
6 - East Kingston	£1,703	£1,732	£1,810	£1,883	1.7%	6.3%	10.6%
7 - Mitcham	£1,553	£1,580	£1,650	£1,717	1.7%	6.2%	10.6%
8 - Streatham	£1,577	£1,604	£1,676	£1,744	1.7%	6.3%	10.6%
9 - Balham/Clapham	£1,750	£1,780	£1,859	£1,935	1.7%	6.2%	10.6%
10 - Wandsworth	£1,727	£1,756	£1,835	£1,910	1.7%	6.3%	10.6%

Sources:
Experian local estimates of 2006 convenience goods expenditure per capita
Excluding special forms of trading - 2.0% in 2008, 2.2% in 2009, 2.3% in 2010 and 2.4% in 2011, 2.5% in 2012 and beyond
Experian Business Strategies - recommended forecast growth rates
(0.7% per annum between 2008 to 2011, 0.9% between 2012 and 2016 and 0.8% per annum between 2017 and 2021)

Table 3B: Total Available Convenience Goods Expenditure (£M - 2006 Prices)

Catchment Area	2008	2011	2016	2021	Growth 2008-2011	Growth 2008-2016	Growth 2008-2021
1 - Wimbledon West	£62.15	£67.23	£70.12	£74.73	8.2%	12.8%	20.3%
2 - East Wimbledon/Colliers Wood	£84.40	£87.53	£92.62	£97.79	3.7%	9.7%	15.9%
3 - Raynes Park	£54.41	£55.63	£58.03	£60.67	2.2%	6.6%	11.5%
4 - North Sutton	£77.95	£79.52	£82.59	£85.83	2.0%	6.0%	10.1%
5 - Tooting	£92.67	£95.06	£100.73	£106.46	2.6%	8.7%	14.9%
6 - East Kingston	£24.62	£25.04	£26.01	£27.00	1.7%	5.6%	9.7%
7 - Mitcham	£85.20	£87.84	£91.54	£95.36	3.1%	7.4%	11.9%
8 - Streatham	£61.19	£62.75	£66.67	£70.46	2.5%	9.0%	15.1%
9 - Balham/Clapham	£87.86	£91.38	£95.97	£100.75	4.0%	9.2%	14.7%
10 - Wandsworth	£74.30	£75.79	£80.59	£85.76	2.0%	8.5%	15.4%
Total	**£704.74**	**£727.77**	**£764.88**	**£804.81**	**3.3%**	**8.5%**	**14.2%**

Sources: *Table 1B and Table 2B*

Table 4B: **Convenience Shopping Penetration Rates 2008**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	% Inflow
Wimbledon town centre	46%	31%	21%	3%	3%	2%	2%	0%	1%	7%	5%
Mitcham town centre	0%	3%	1%	1%	2%	2%	23%	0%	0%	0%	5%
Morden town centre	1%	8%	5%	18%	0%	0%	3%	1%	0%	0%	5%
Colliers Woods Urban Centre	4%	22%	3%	1%	14%	0%	13%	2%	0%	3%	5%
Tesco Extra, New Malden	6%	9%	35%	11%	1%	35%	3%	0%	0%	1%	20%
Other in Merton	10%	10%	20%	13%	8%	7%	20%	0%	0%	0%	2%
LB Merton Sub-Total	**67%**	**83%**	**85%**	**47%**	**28%**	**46%**	**64%**	**3%**	**1%**	**11%**	**n/a**
Other in the Study Area	17%	10%	11%	21%	63%	45%	8%	84%	68%	68%	n/a
Tesco, Streatham (proposed)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Rest of Study Area Sub-Total	**17%**	**10%**	**11%**	**21%**	**63%**	**45%**	**8%**	**84%**	**68%**	**68%**	**n/a**
Expenditure Outflow	**16%**	**7%**	**4%**	**32%**	**9%**	**9%**	**28%**	**13%**	**31%**	**21%**	**n/a**
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Source: *NEMS household surveys 2005 and 2007*
NLP

Table 5B: **Convenience Expenditure 2008 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	% Inflow	Total Expend
Expenditure 2008	**£62.15**	**£84.40**	**£54.41**	**£77.95**	**£92.67**	**£24.62**	**£85.20**	**£61.19**	**£87.86**	**£74.30**	**n/a**	
Wimbledon town centre	£28.59	£26.16	£11.43	£2.34	£2.78	£0.49	£1.70	£0.00	£0.88	£5.20	£4.19	**£83.76**
Mitcham town centre	£0.00	£2.53	£0.54	£0.78	£1.85	£0.49	£19.60	£0.00	£0.00	£0.00	£1.36	**£27.16**
Morden town centre	£0.62	£6.75	£2.72	£14.03	£0.00	£0.00	£2.56	£0.61	£0.00	£0.00	£1.44	**£28.73**
Colliers Woods Urban Centre	£2.49	£18.57	£1.63	£0.78	£12.97	£0.00	£11.08	£1.22	£0.00	£2.23	£2.68	**£53.65**
Tesco Extra, New Malden	£3.73	£7.60	£19.04	£8.57	£0.93	£8.62	£2.56	£0.00	£0.00	£0.74	£12.95	**£64.73**
Other in Merton	£6.21	£8.44	£10.88	£10.13	£7.41	£1.72	£17.04	£0.00	£0.00	£0.00	£1.26	**£63.11**
LB Merton Sub-Total	**£41.64**	**£70.05**	**£46.25**	**£36.64**	**£25.95**	**£11.33**	**£54.53**	**£1.84**	**£0.88**	**£8.17**	**£23.87**	**£321.14**
Other in Study Area	£10.56	£8.44	£5.99	£16.37	£58.38	£11.08	£6.82	£51.40	£59.74	£50.53	n/a	**£279.30**
Tesco, Streatham (proposed)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	**n/a**
Rest of Study Area Sub-Total	**£10.56**	**£8.44**	**£5.99**	**£16.37**	**£58.38**	**£11.08**	**£6.82**	**£51.40**	**£59.74**	**£50.53**	**n/a**	**£279.30**
Expenditure Outflow	**£9.94**	**£5.91**	**£2.18**	**£24.94**	**£8.34**	**£2.22**	**£23.86**	**£7.95**	**£27.24**	**£15.60**	**n/a**	**£128.18**
Total	**£62.15**	**£84.40**	**£54.41**	**£77.95**	**£92.67**	**£24.62**	**£85.20**	**£61.19**	**£87.86**	**£74.30**	**n/a**	**£704.74**

Sources: Table 3B and 4B

Table 6B: Future Convenience Shopping Penetration Rates 2011 to 2016

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	% Inflow
Wimbledon town centre	45%	30%	20%	3%	3%	2%	2%	0%	1%	7%	5%
Mitcham town centre	0%	3%	1%	1%	2%	2%	22%	0%	0%	0%	5%
Morden town centre	1%	8%	5%	17%	0%	0%	3%	1%	0%	0%	5%
Colliers Woods Urban Centre	5%	25%	4%	2%	16%	0%	14%	1%	0%	3%	5%
Tesco Extra, New Malden	6%	8%	35%	11%	1%	35%	3%	0%	0%	1%	20%
Other in Merton	10%	10%	20%	13%	7%	7%	19%	0%	0%	0%	2%
LB Merton Sub-Total	**67%**	**84%**	**85%**	**47%**	**29%**	**46%**	**63%**	**2%**	**1%**	**11%**	**n/a**
Other in the Study Area	17%	9%	11%	21%	58%	45%	5%	61%	64%	68%	n/a
Tesco, Streatham (proposed)	0%	0%	0%	0%	5%	0%	5%	30%	5%	0%	n/a
Rest of Study Area Sub-Total	**17%**	**9%**	**11%**	**21%**	**63%**	**45%**	**10%**	**91%**	**69%**	**68%**	**n/a**
Expenditure Outflow	**16%**	**7%**	**4%**	**32%**	**8%**	**9%**	**27%**	**7%**	**30%**	**21%**	**n/a**
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Source: *NEMS household surveys 2005 and 2007*
NLP

Table 7B: **Convenience Expenditure 2011 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	% Inflow	Total Expend
Expenditure 2011	**£67.23**	**£87.53**	**£55.63**	**£79.52**	**£95.06**	**£25.04**	**£87.84**	**£62.75**	**£91.38**	**£75.79**	**n/a**	
Wimbledon town centre	£30.25	£26.26	£11.13	£2.39	£2.85	£0.50	£1.76	£0.00	£0.91	£5.31	£4.28	**£85.63**
Mitcham town centre	£0.00	£2.63	£0.56	£0.80	£1.90	£0.50	£19.33	£0.00	£0.00	£0.00	£1.35	**£27.06**
Morden town centre	£0.67	£7.00	£2.78	£13.52	£0.00	£0.00	£2.64	£0.63	£0.00	£0.00	£1.43	**£28.67**
Colliers Woods Urban Centre*	£3.36	£21.88	£2.23	£1.59	£15.21	£0.00	£12.30	£0.63	£0.00	£2.27	£3.13	**£62.60**
Tesco Extra, New Malden	£4.03	£7.00	£19.47	£8.75	£0.95	£8.76	£2.64	£0.00	£0.00	£0.76	£13.09	**£65.45**
Other in Merton	£6.72	£8.75	£11.13	£10.34	£6.65	£1.75	£16.69	£0.00	£0.00	£0.00	£1.27	**£63.30**
LB Merton Sub-Total	**£45.04**	**£73.52**	**£47.29**	**£37.37**	**£27.57**	**£11.52**	**£55.34**	**£1.25**	**£0.91**	**£8.34**	**£24.55**	**£332.71**
Other in Study Area	£11.43	£7.88	£6.12	£16.70	£55.14	£11.27	£4.39	£38.28	£58.48	£51.54	n/a	**£261.22**
Tesco, Streatham (proposed)	£0.00	£0.00	£0.00	£0.00	£4.75	£0.00	£4.39	£18.82	£4.57	£0.00	n/a	**£32.54**
Rest of Study Area Sub-Total	**£11.43**	**£7.88**	**£6.12**	**£16.70**	**£59.89**	**£11.27**	**£8.78**	**£57.10**	**£63.05**	**£51.54**	**n/a**	**£293.76**
Expenditure Outflow	**£10.76**	**£6.13**	**£2.23**	**£25.45**	**£8.56**	**£2.25**	**£24.60**	**£8.16**	**£28.33**	**£15.92**	**n/a**	**£132.36**
Total	**£67.23**	**£87.53**	**£55.63**	**£79.52**	**£95.06**	**£25.04**	**£87.84**	**£62.75**	**£91.38**	**£75.79**	**n/a**	**£727.77**

Sources: Table 3B and 6B * including new Marks & Spencer Food Hall

Table 8B: **Convenience Expenditure 2016 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	% Inflow	Total Expend
Expenditure 2016	**£70.12**	**£92.62**	**£58.03**	**£82.59**	**£100.73**	**£26.01**	**£91.54**	**£66.67**	**£95.97**	**£80.59**	**n/a**	
Wimbledon town centre	£31.56	£27.79	£11.61	£2.48	£3.02	£0.52	£1.83	£0.00	£0.96	£5.64	£4.49	**£89.89**
Mitcham town centre	£0.00	£2.78	£0.58	£0.83	£2.01	£0.52	£20.14	£0.00	£0.00	£0.00	£1.41	**£28.27**
Morden town centre	£0.70	£7.41	£2.90	£14.04	£0.00	£0.00	£2.75	£0.67	£0.00	£0.00	£1.50	**£29.96**
Colliers Woods Urban Centre*	£3.51	£23.16	£2.32	£1.65	£16.12	£0.00	£12.82	£0.67	£0.00	£2.42	£3.30	**£65.95**
Tesco Extra, New Malden	£4.21	£7.41	£20.31	£9.09	£1.01	£9.10	£2.75	£0.00	£0.00	£0.81	£13.67	**£68.34**
Other in Merton	£7.01	£9.26	£11.61	£10.74	£7.05	£1.82	£17.39	£0.00	£0.00	£0.00	£1.32	**£66.21**
LB Merton Sub-Total	**£46.98**	**£77.80**	**£49.32**	**£38.82**	**£29.21**	**£11.96**	**£57.67**	**£1.33**	**£0.96**	**£8.86**	**£25.70**	**£348.63**
Other in Study Area	£11.92	£8.34	£6.38	£17.34	£58.42	£11.70	£4.58	£40.67	£61.42	£54.80	n/a	**£275.58**
Tesco, Streatham (proposed)	£0.00	£0.00	£0.00	£0.00	£5.04	£0.00	£4.58	£20.00	£4.80	£0.00	n/a	**£34.41**
Rest of Study Area Sub-Total	**£11.92**	**£8.34**	**£6.38**	**£17.34**	**£63.46**	**£11.70**	**£9.15**	**£60.67**	**£66.22**	**£54.80**	**n/a**	**£309.99**
Expenditure Outflow	**£11.22**	**£6.48**	**£2.32**	**£26.43**	**£9.07**	**£2.34**	**£25.63**	**£8.67**	**£29.75**	**£16.92**	**n/a**	**£138.83**
Total	**£70.12**	**£92.62**	**£58.03**	**£82.59**	**£100.73**	**£26.01**	**£91.54**	**£66.67**	**£95.97**	**£80.59**	**n/a**	**£764.88**

Sources: Table 3B and 6B * including new Marks & Spencer Food Hall

Table 9B: Convenience Expenditure 2021 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	% Inflow	Total Expend
Expenditure 2021	**£74.73**	**£97.79**	**£60.67**	**£85.83**	**£106.46**	**£27.00**	**£95.36**	**£70.46**	**£100.75**	**£85.76**	**n/a**	
Wimbledon town centre	£33.63	£29.34	£12.13	£2.57	£3.19	£0.54	£1.91	£0.00	£1.01	£6.00	£4.75	**£95.08**
Mitcham town centre	£0.00	£2.93	£0.61	£0.86	£2.13	£0.54	£20.98	£0.00	£0.00	£0.00	£1.48	**£29.52**
Morden town centre	£0.75	£7.82	£3.03	£14.59	£0.00	£0.00	£2.86	£0.70	£0.00	£0.00	£1.57	**£31.33**
Colliers Woods Urban Centre*	£3.74	£24.45	£2.43	£1.72	£17.03	£0.00	£13.35	£0.70	£0.00	£2.57	£3.47	**£69.46**
Tesco Extra, New Malden	£4.48	£7.82	£21.23	£9.44	£1.06	£9.45	£2.86	£0.00	£0.00	£0.86	£14.30	**£71.52**
Other in Merton	£7.47	£9.78	£12.13	£11.16	£7.45	£1.89	£18.12	£0.00	£0.00	£0.00	£1.39	**£69.39**
LB Merton Sub-Total	**£50.07**	**£82.15**	**£51.57**	**£40.34**	**£30.87**	**£12.42**	**£60.07**	**£1.41**	**£1.01**	**£9.43**	**£26.96**	**£366.31**
Other in Study Area	£12.70	£8.80	£6.67	£18.02	£61.75	£12.15	£4.77	£42.98	£64.48	£58.32	n/a	**£290.65**
Tesco, Streatham (proposed)	£0.00	£0.00	£0.00	£0.00	£5.32	£0.00	£4.77	£21.14	£5.04	£0.00	n/a	**£36.27**
Rest of Study Area Sub-Total	**£12.70**	**£8.80**	**£6.67**	**£18.02**	**£67.07**	**£12.15**	**£9.54**	**£64.11**	**£69.52**	**£58.32**	**n/a**	**£326.91**
Expenditure Outflow	**£11.96**	**£6.85**	**£2.43**	**£27.47**	**£9.58**	**£2.43**	**£26.70**	**£9.16**	**£31.23**	**£18.01**	**n/a**	**£145.81**
Total	**£74.73**	**£97.79**	**£60.67**	**£85.83**	**£106.46**	**£27.00**	**£95.36**	**£70.46**	**£100.75**	**£85.76**	**n/a**	**£804.81**

Sources: Table 3B and 6B

* including new Marks & Spencer Food Hall

Table 10B: Summary of Convenience Turnover 2008 to 2016 (£Million)

Centre/Facilities	2008	2011	2016	2021
Available Expenditure in Merton				
Wimbledon town centre	£83.76	£85.63	£89.89	£95.08
Mitcham town centre	£27.16	£27.06	£28.27	£29.52
Morden town centre	£28.73	£28.67	£29.96	£31.33
Colliers Woods	£53.65	£62.60	£65.95	£69.46
Tesco Extra, New Malden	£64.73	£65.45	£68.34	£71.52
Other in Merton	£63.11	£63.30	£66.21	£69.39
Total	**£321.14**	**£332.71**	**£348.63**	**£366.31**
Benchmark Turnover of Existing Facilities				
Wimbledon town centre	£60.59	£61.14	£62.06	£63.00
Mitcham town centre	£21.45	£21.64	£21.97	£22.30
Morden town centre	£25.12	£25.35	£25.73	£26.12
Colliers Woods*	£60.91	£61.46	£62.39	£63.33
Tesco Extra, New Malden	£55.48	£55.98	£56.83	£57.68
Other in Merton	£47.80	£48.23	£48.96	£49.70
Total	**£271.35**	**£273.80**	**£277.93**	**£282.13**
Surplus Expenditure				
Wimbledon town centre	£23.17	£24.49	£27.83	£32.09
Mitcham town centre	£5.71	£5.41	£6.30	£7.22
Morden town centre	£3.61	£3.32	£4.24	£5.21
Colliers Woods	-£7.26	£1.14	£3.56	£6.13
Tesco Extra, New Malden	£9.25	£9.47	£11.52	£13.84
Other in Merton	£15.31	£15.07	£17.25	£19.69
Total	**£49.79**	**£58.91**	**£70.70**	**£84.18**
Turnover Density for New Floorspace £ per Sq M				
Large store density	£10,000	£10,090	£10,243	£10,397
Small shops/stores density	£5,000	£5,045	£5,121	£5,199
Large Store - Sales Floorspace (Sq m Net)				
Wimbledon (85% of surplus expenditure)	1,969	2,063	2,310	2,623
Mitcham (85% of surplus expenditure)	485	456	523	590
Morden (85% of surplus expenditure)	307	280	351	426
Colliers Wood (85% of surplus expenditure)	-617	96	296	502
Tesco Extra, New Maldon (100% of surplus expenditure)	786	798	956	1,131
Other in Merton (50% of surplus expenditure)	765	747	842	947
Total	**3,696**	**4,440**	**5,278**	**6,219**
Small shops/stores - Sales Floorspace (Sq m Net)				
Wimbledon (15% of surplus expenditure)	695	728	815	926
Mitcham (15% of surplus expenditure)	171	161	185	208
Morden (15% of surplus expenditure)	108	99	124	150
Colliers Wood (15% of surplus expenditure)	-218	34	104	177
Tesco Extra, New Maldon (0% of surplus expenditure)	n/a	n/a	n/a	n/a
Other in Merton (50% of surplus expenditure)	1,531	1,494	1,684	1,894
Total	**2,288**	**2,515**	**2,912**	**3,356**

Sources: Tables 1A, 5B to 9B

* including proposed Mark & Spencer Food Hall

Appendix C

Comparison Retail Assessment

Table 1C: Comparison Goods Expenditure Per Capita (2006 Prices)

Expenditure Per Capita	2008	2011	2016	2021	Growth 2008-2011	Growth 2008-2016	Growth 2008-2021
1 - Wimbledon West	£3,565	£3,948	£4,621	£5,488	10.7%	29.6%	53.9%
2 - East Wimbledon/Colliers Wood	£3,388	£3,752	£4,392	£5,216	10.7%	29.6%	54.0%
3 - Raynes Park	£3,554	£3,936	£4,607	£5,472	10.7%	29.6%	54.0%
4 - North Sutton	£2,929	£3,244	£3,797	£4,510	10.8%	29.6%	54.0%
5 - Tooting	£2,947	£3,264	£3,821	£4,538	10.8%	29.7%	54.0%
6 - East Kingston	£3,103	£3,437	£4,023	£4,778	10.8%	29.6%	54.0%
7 - Mitcham	£2,670	£2,956	£3,461	£4,110	10.7%	29.6%	53.9%
8 - Streatham	£2,839	£3,143	£3,680	£4,370	10.7%	29.6%	53.9%
9 - Balham/Clapham	£3,216	£3,561	£4,169	£4,951	10.7%	29.6%	53.9%
10 - Wandsworth	£3,169	£3,509	£4,107	£4,878	10.7%	29.6%	53.9%

Sources:

Experian local estimates for 2006 comparison goods expenditure per capita
(Excluding special forms of trading - 8.3% in 2008, 8.7% in 2009, 9.0% in 2010, 9.2% in 2011 and beyond)
Experian Business Strategies - recommended forecast growth rates
(3.8% per annum between 2008 to 2011 and 3.2% per annum between 2012 and 2016, and 3.5% - 2017 to 2021)

Table 2C: Total Available Comparison Goods Expenditure (£M - 2006 Prices)

Catchment Area	2008	2011	2016	2021	Growth 2008-2011	Growth 2008-2016	Growth 2006-2021
1 - Wimbledon West	£105.61	£127.99	£159.31	£188.92	21.2%	50.9%	78.9%
2 - East Wimbledon/Colliers Wood	£150.32	£170.98	£204.04	£245.49	13.7%	35.7%	63.3%
3 - Raynes Park	£98.64	£110.23	£129.70	£153.85	11.7%	31.5%	56.0%
4 - North Sutton	£138.22	£152.88	£179.50	£212.01	10.6%	29.9%	53.4%
5 - Tooting	£168.05	£187.29	£221.21	£266.39	11.4%	31.6%	58.5%
6 - East Kingston	£44.93	£49.69	£58.16	£68.65	10.6%	29.5%	52.8%
7 - Mitcham	£145.81	£162.18	£192.42	£228.01	11.2%	32.0%	56.4%
8 - Streatham	£109.21	£121.95	£143.96	£173.83	11.7%	31.8%	59.2%
9 - Balham/Clapham	£159.14	£178.78	£214.02	£255.61	12.3%	34.5%	60.6%
10 - Wandsworth	£133.93	£150.97	£177.27	£214.23	12.7%	32.4%	60.0%
Total	**£1,253.86**	**£1,412.92**	**£1,679.60**	**£2,006.99**	**12.7%**	**34.0%**	**60.1%**

Sources: *Table 1B and Table 1C*

Table 3C: **Comparison Shopping Penetration Rates and Available Expenditure 2008**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	% Inflow	Total Expend.
Expenditure 2008	**£105.61**	**£150.32**	**£98.64**	**£138.22**	**£168.05**	**£44.93**	**£145.81**	**£109.21**	**£159.14**	**£133.93**	**n/a**	**£1,253.86**
Market Share												
Wimbledon	27%	25%	22%	8%	8%	5%	5%	5%	5%	18%	10%	
Mitcham	0%	1%	0%	0%	1%	0%	10%	3%	0%	0%	5%	
Morden	0%	2%	5%	5%	0%	5%	2%	0%	0%	0%	5%	
Colliers Wood	10%	16%	5%	4%	7%	2%	8%	2%	1%	2%	15%	
Out-of-Centre Raynes Park	5%	7%	9%	4%	0%	8%	1%	0%	0%	0%	35%	
Other Merton	8%	9%	6%	3%	5%	5%	8%	3%	2%	5%	5%	
Borough Area Total	**50%**	**60%**	**47%**	**24%**	**21%**	**25%**	**34%**	**13%**	**8%**	**25%**	**n/a**	
Wandsworth	5%	2%	0%	0%	5%	0%	1%	2%	9%	28%	n/a	
Balham	0%	0%	0%	0%	6%	0%	0%	1%	13%	0%	n/a	
Tooting	1%	2%	1%	1%	24%	0%	6%	4%	4%	2%	n/a	
Streatham	0%	0%	0%	0%	2%	0%	1%	20%	7%	0%	n/a	
Other in Rest of Study Area	1%	1%	9%	3%	0%	20%	0%	0%	0%	1%	n/a	
Rest of Study Area Total	**7%**	**5%**	**10%**	**4%**	**37%**	**20%**	**8%**	**27%**	**33%**	**31%**	**n/a**	
Croydon	2%	6%	3%	7%	13%	2%	32%	32%	7%	4%	n/a	
Kingston	17%	15%	23%	14%	5%	40%	3%	2%	2%	10%	n/a	
Central London/West End	13%	5%	7%	1%	14%	4%	3%	10%	24%	14%	n/a	
Sutton	0%	5%	6%	44%	2%	4%	13%	4%	1%	1%	n/a	
Other Outflow	11%	4%	4%	6%	8%	5%	7%	12%	25%	15%	n/a	
Outflow Total	**43%**	**35%**	**43%**	**72%**	**42%**	**55%**	**58%**	**60%**	**59%**	**44%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**	**Zone 10**	**Inflow Expend.**	**Total £M**
Turnover £M												
Wimbledon	£28.51	£37.58	£21.70	£11.06	£13.44	£2.25	£7.29	£5.46	£7.96	£24.11	£17.71	£177.06
Mitcham	£0.00	£1.50	£0.00	£0.00	£1.68	£0.00	£14.58	£3.28	£0.00	£0.00	£1.11	£22.15
Morden	£0.00	£3.01	£4.93	£6.91	£0.00	£2.25	£2.92	£0.00	£0.00	£0.00	£1.05	£21.07
Colliers Wood	£10.56	£24.05	£4.93	£5.53	£11.76	£0.90	£11.67	£2.18	£1.59	£2.68	£13.39	£89.24
Out-of-Centre Raynes Park	£5.28	£10.52	£8.88	£5.53	£0.00	£3.59	£1.46	£0.00	£0.00	£0.00	£18.99	£54.25
Other Merton	£8.45	£13.53	£5.92	£4.15	£8.40	£2.25	£11.67	£3.28	£3.18	£6.70	£3.55	£71.06
Borough Area Total	**£52.80**	**£90.19**	**£46.36**	**£33.17**	**£35.29**	**£11.23**	**£49.58**	**£14.20**	**£12.73**	**£33.48**	**£55.79**	**£434.83**
Wandsworth	£5.28	£3.01	£0.00	£0.00	£8.40	£0.00	£1.46	£2.18	£14.32	£37.50	n/a	£72.15
Balham	£0.00	£0.00	£0.00	£0.00	£10.08	£0.00	£0.00	£1.09	£20.69	£0.00	n/a	£31.86
Tooting	£1.06	£3.01	£0.99	£1.38	£40.33	£0.00	£8.75	£4.37	£6.37	£2.68	n/a	£68.92
Streatham	£0.00	£0.00	£0.00	£0.00	£3.36	£0.00	£1.46	£21.84	£11.14	£0.00	n/a	£37.80
Other in Rest of Study Area	£1.06	£1.50	£8.88	£4.15	£0.00	£8.99	£0.00	£0.00	£0.00	£1.34	n/a	£25.91
Rest of Study Area Total	**£7.39**	**£7.52**	**£9.86**	**£5.53**	**£62.18**	**£8.99**	**£11.67**	**£29.49**	**£52.52**	**£41.52**	**n/a**	**£236.65**
Croydon	£2.11	£9.02	£2.96	£9.68	£21.85	£0.90	£46.66	£34.95	£11.14	£5.36	n/a	£144.62
Kingston	£17.95	£22.55	£22.69	£19.35	£8.40	£17.97	£4.37	£2.18	£3.18	£13.39	n/a	£132.05
Central London/West End	£13.73	£7.52	£6.91	£1.38	£23.53	£1.80	£4.37	£10.92	£38.19	£18.75	n/a	£127.10
Sutton	£0.00	£7.52	£5.92	£60.82	£3.36	£1.80	£18.96	£4.37	£1.59	£1.34	n/a	£105.66
Other Outflow	£11.62	£6.01	£3.95	£8.29	£13.44	£2.25	£10.21	£13.11	£39.79	£20.09	n/a	£128.75
Outflow Total	**£45.41**	**£52.61**	**£42.42**	**£99.52**	**£70.58**	**£24.71**	**£84.57**	**£65.53**	**£93.89**	**£58.93**	**n/a**	**£638.17**
TOTAL	**£105.61**	**£150.32**	**£98.64**	**£138.22**	**£168.05**	**£44.93**	**£145.81**	**£109.21**	**£159.14**	**£133.93**	**n/a**	**n/a**

Sources: *Table 2C*
NEMS Household and Street Surveys 2005/2008
NLP

Table 4C: Proposed Marks & Spencer Store Colliers Woods - Comparison Turnover and Trade Draw

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Elsewhere	Total
% Trade Draw	10%	20%	5%	5%	7%	4%	15%	5%	4%	5%	20%	100%
Turnover £M	4.03	8.06	2.02	2.02	2.82	1.61	6.05	2.02	1.61	2.02	8.06	40.30

NB - Expected comparison turnover is £40.3 million based on a sales area of about 8,000 sq m net and an average sales density of £5,038 per sq m net.

Table 5C: Comparison Shopping Penetration Rates and Available Expenditure 2011

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	% Inflow	Total Expend.
Expenditure 2011	**£127.99**	**£170.98**	**£110.23**	**£152.88**	**£187.29**	**£49.69**	**£162.18**	**£121.95**	**£178.78**	**£150.97**	**n/a**	**£1,412.92**
Turnover £M												
Wimbledon	£33.10	£39.73	£23.66	£12.04	£14.66	£2.38	£7.69	£5.97	£8.83	£26.76	£19.42	£194.25
Mitcham	£0.00	£1.65	£0.00	£0.00	£1.85	£0.00	£15.80	£3.62	£0.00	£0.00	£1.21	£24.13
Morden	£0.00	£3.30	£5.44	£7.58	£0.00	£2.43	£3.16	£0.00	£0.00	£0.00	£1.15	£23.07
Colliers Wood	£12.80	£27.36	£5.51	£6.12	£13.11	£0.99	£12.97	£2.44	£1.79	£3.02	£15.20	£101.30
M&S, Colliers Wood	£4.03	£8.06	£2.02	£2.02	£2.82	£1.61	£6.05	£2.02	£1.61	£2.02	£8.06	£40.30
Out-of-Centre Raynes Park	£6.33	£11.76	£9.86	£6.09	£0.00	£3.93	£1.60	£0.00	£0.00	£0.00	£21.31	£60.89
Other Merton	£10.18	£15.24	£6.59	£4.58	£9.34	£2.47	£12.89	£3.65	£3.57	£7.53	£4.00	£80.04
Borough Area Total	**£66.44**	**£107.09**	**£53.09**	**£38.42**	**£41.78**	**£13.82**	**£60.16**	**£17.69**	**£15.80**	**£39.33**	**£70.35**	**£523.98**
Wandsworth	£6.13	£3.18	£0.00	£0.00	£9.16	£0.00	£1.54	£2.39	£15.90	£41.63	n/a	£79.92
Balham	£0.00	£0.00	£0.00	£0.00	£11.12	£0.00	£0.00	£1.21	£23.10	£0.00	n/a	£35.43
Tooting	£1.25	£3.30	£1.09	£1.52	£44.46	£0.00	£9.48	£4.83	£7.11	£3.00	n/a	£76.03
Streatham	£0.00	£0.00	£0.00	£0.00	£3.71	£0.00	£1.58	£24.13	£12.44	£0.00	n/a	£41.86
Other in Rest of Study Area	£1.24	£1.63	£9.76	£4.54	£0.00	£9.66	£0.00	£0.00	£0.00	£1.49	n/a	£28.33
Rest of Study Area Total	**£8.63**	**£8.11**	**£10.85**	**£6.06**	**£68.44**	**£9.66**	**£12.60**	**£32.55**	**£58.56**	**£46.12**	**n/a**	**£261.56**
Croydon	£2.45	£9.53	£3.23	£10.53	£23.82	£0.95	**£49.23**	£38.19	£12.37	£5.95	n/a	£156.25
Kingston	£20.84	£23.84	£24.74	£21.07	£9.16	£19.04	£4.62	£2.39	£3.53	£14.87	n/a	£144.09
Central London/West End	£15.94	£7.95	£7.53	£1.50	£25.65	£1.90	£4.62	£11.93	£42.40	£20.81	n/a	£140.24
Sutton	£0.00	£7.95	£6.45	£66.22	£3.66	£1.90	£20.00	£4.77	£1.77	£1.49	n/a	£114.21
Other Outflow	£13.68	£6.52	£4.34	£9.08	£14.77	£2.41	£10.96	£14.43	£44.34	£22.41	n/a	£142.95
Outflow Total	**£52.92**	**£55.78**	**£46.29**	**£108.40**	**£77.06**	**£26.21**	**£89.42**	**£71.71**	**£104.42**	**£65.53**	**n/a**	**£697.74**
TOTAL	**£127.99**	**£170.98**	**£110.23**	**£152.88**	**£187.29**	**£49.69**	**£162.18**	**£121.95**	**£178.78**	**£150.97**	**n/a**	**n/a**

Sources: *Table 3C and 4C*

Table 6C: Comparison Shopping Penetration Rates and Available Expenditure 2016

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	% Inflow	Total Expend.
Expenditure 2016	**£159.31**	**£204.04**	**£129.70**	**£179.50**	**£221.21**	**£58.16**	**£192.42**	**£143.96**	**£214.02**	**£177.27**	**n/a**	**£1,679.60**
Turnover £M												
Wimbledon	£41.20	£47.41	£27.85	£14.14	£17.31	£2.79	£9.13	£7.04	£10.58	£31.42	£23.21	£232.07
Mitcham	£0.00	£1.97	£0.00	£0.00	£2.19	£0.00	£18.75	£4.27	£0.00	£0.00	£1.43	£28.61
Morden	£0.00	£3.94	£6.41	£8.91	£0.00	£2.85	£3.75	£0.00	£0.00	£0.00	£1.36	£27.21
Colliers Wood	£20.95	£42.27	£8.86	£9.55	£18.82	£3.05	£22.57	£5.26	£4.07	£5.91	£27.76	£169.05
Out-of-Centre Raynes Park	£7.88	£14.03	£11.60	£7.15	£0.00	£4.60	£1.90	£0.00	£0.00	£0.00	£25.40	£72.57
Other Merton	£12.67	£18.19	£7.76	£5.37	£11.03	£2.89	£15.29	£4.31	£4.27	£8.85	£4.77	£95.40
Borough Area Total	**£82.71**	**£127.80**	**£62.47**	**£45.11**	**£49.35**	**£16.18**	**£71.38**	**£20.88**	**£18.92**	**£46.18**	**£83.93**	**£624.90**
Wandsworth	£7.63	£3.79	£0.00	£0.00	£10.82	£0.00	£1.83	£2.82	£19.04	£48.88	n/a	£94.80
Balham	£0.00	£0.00	£0.00	£0.00	£13.13	£0.00	£0.00	£1.42	£27.66	£0.00	n/a	£42.21
Tooting	£1.56	£3.94	£1.28	£1.78	£52.52	£0.00	£11.25	£5.70	£8.51	£3.52	n/a	£90.05
Streatham	£0.00	£0.00	£0.00	£0.00	£4.38	£0.00	£1.87	£28.48	£14.89	£0.00	n/a	£49.63
Other in Rest of Study Area	£1.55	£1.94	£11.49	£5.33	£0.00	£11.31	£0.00	£0.00	£0.00	£1.75	n/a	£33.37
Rest of Study Area Total	**£10.74**	**£9.67**	**£12.77**	**£7.11**	**£80.84**	**£11.31**	**£14.95**	**£38.42**	**£70.10**	**£54.15**	**n/a**	**£310.06**
Croydon	£3.05	£11.38	£3.80	£12.37	£28.13	£1.11	£58.41	£45.08	£14.81	£6.98	n/a	£185.13
Kingston	£25.94	£28.45	£29.11	£24.74	£10.82	£22.28	£5.48	£2.82	£4.23	£17.46	n/a	£171.32
Central London/West End	£19.84	£9.48	£8.86	£1.77	£30.30	£2.23	£5.48	£14.09	£50.76	£24.44	n/a	£167.24
Sutton	£0.00	£9.48	£7.59	£77.75	£4.33	£2.23	£23.73	£5.64	£2.12	£1.75	n/a	£134.61
Other Outflow	£17.03	£7.78	£5.10	£10.66	£17.44	£2.83	£13.01	£17.03	£53.09	£26.32	n/a	£170.28
Outflow Total	**£65.87**	**£66.57**	**£54.47**	**£127.28**	**£91.02**	**£30.68**	**£106.10**	**£84.66**	**£125.00**	**£76.94**	**n/a**	**£828.58**
TOTAL	**£159.31**	**£204.04**	**£129.70**	**£179.50**	**£221.21**	**£58.16**	**£192.42**	**£143.96**	**£214.02**	**£177.27**	**n/a**	**n/a**

Sources: *Table 2C and 5C*

Table 7C: Comparison Shopping Penetration Rates and Available Expenditure 2021

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	% Inflow	Total Expend.
Expenditure 2021	**£188.92**	**£245.49**	**£153.85**	**£212.01**	**£266.39**	**£68.65**	**£228.01**	**£173.83**	**£255.61**	**£214.23**	**n/a**	**£2,006.99**
Turnover £M												
Wimbledon	£48.86	£57.04	£33.03	£16.70	£20.85	£3.29	£10.81	£8.51	£12.63	£37.97	£27.74	£277.43
Mitcham	£0.00	£2.37	£0.00	£0.00	£2.64	£0.00	£22.22	£5.16	£0.00	£0.00	£1.70	£34.08
Morden	£0.00	£4.74	£7.60	£10.52	£0.00	£3.36	£4.44	£0.00	£0.00	£0.00	£1.61	£32.27
Colliers Wood	£24.84	£50.85	£10.50	£11.27	£22.66	£3.60	£26.74	£6.35	£4.86	£7.14	£33.17	£202.00
Out-of-Centre Raynes Park	£9.35	£16.88	£13.76	£8.45	£0.00	£5.43	£2.25	£0.00	£0.00	£0.00	£30.22	£86.34
Other Merton	£15.03	£21.89	£9.20	£6.35	£13.28	£3.41	£18.12	£5.20	£5.10	£10.69	£5.70	£113.97
Borough Area Total	**£98.08**	**£153.76**	**£74.10**	**£53.28**	**£59.43**	**£19.10**	**£84.58**	**£25.21**	**£22.60**	**£55.80**	**£100.15**	**£746.09**
Wandsworth	£9.05	£4.56	£0.00	£0.00	£13.03	£0.00	£2.16	£3.40	£22.73	£59.07	n/a	£114.01
Balham	£0.00	£0.00	£0.00	£0.00	£15.81	£0.00	£0.00	£1.72	£33.03	£0.00	n/a	£50.56
Tooting	£1.85	£4.74	£1.52	£2.10	£63.24	£0.00	£13.33	£6.88	£10.16	£4.25	n/a	£108.07
Streatham	£0.00	£0.00	£0.00	£0.00	£5.27	£0.00	£2.22	£34.40	£17.79	£0.00	n/a	£59.67
Other in Rest of Study Area	£1.84	£2.34	£13.62	£6.29	£0.00	£13.34	£0.00	£0.00	£0.00	£2.12	n/a	£39.56
Rest of Study Area Total	**£12.73**	**£11.64**	**£15.14**	**£8.40**	**£97.35**	**£13.34**	**£17.71**	**£46.40**	**£83.72**	**£65.44**	**n/a**	**£371.88**
Croydon	£3.62	£13.69	£4.50	£14.61	£33.88	£1.32	£69.21	£54.44	£17.68	£8.44	n/a	£221.39
Kingston	£30.77	£34.22	£34.53	£29.22	£13.03	£26.30	£6.49	£3.40	£5.05	£21.10	n/a	£204.11
Central London/West End	£23.53	£11.41	£10.51	£2.09	£36.49	£2.63	£6.49	£17.01	£60.63	£29.53	n/a	£200.31
Sutton	£0.00	£11.41	£9.01	£91.83	£5.21	£2.63	£28.12	£6.80	£2.53	£2.11	n/a	£159.64
Other Outflow	£20.20	£9.36	£6.05	£12.59	£21.00	£3.34	£15.41	£20.56	£63.40	£31.81	n/a	£203.72
Outflow Total	**£78.11**	**£80.09**	**£64.61**	**£150.33**	**£109.61**	**£36.21**	**£125.72**	**£102.22**	**£149.29**	**£92.98**	**n/a**	**£989.17**
TOTAL	**£188.92**	**£245.49**	**£153.85**	**£212.01**	**£266.39**	**£68.65**	**£228.01**	**£173.83**	**£255.61**	**£214.23**	**n/a**	**n/a**

Sources: *Table 2C and 5C*

Table 8C: Comparsion Retail Capacity 2008 to 2021 - With Mark & Spencer at Colliers Wood (2011 onwards)

	2008	2011	2016	2021
A - Available Expenditure £M				
Wimbledon	£177.06	£194.25	£232.07	£277.43
Mitcham	£22.15	£24.13	£28.61	£34.08
Morden	£21.07	£23.07	£27.21	£32.27
Colliers Wood	£89.24	£141.60	£169.05	£202.00
Out-of-Centre Raynes Park	£54.25	£60.89	£72.57	£86.34
Other Merton	£71.06	£80.04	£95.40	£113.97
LB Merton Total	**£434.83**	**£523.98**	**£624.90**	**£746.09**
B - Benchmark Turnover Existing Floorspace £M				
Wimbledon	£175.06	£183.06	£197.20	£212.44
Mitcham	£21.29	£22.26	£23.98	£25.84
Morden	£17.56	£18.36	£19.78	£21.31
Colliers Wood	£88.53	£92.57	£99.73	£107.44
Out-of-Centre Raynes Park	£51.66	£54.02	£58.19	£62.69
Other Merton	£73.48	£76.84	£82.77	£89.17
LB Merton Total	**£427.58**	**£447.94**	**£468.40**	**£504.60**
C - Benchmark Turnover Commitments £M				
Wimbledon	n/a	£0.00	£0.00	£0.00
Mitcham	n/a	£0.00	£0.00	£0.00
Morden	n/a	£0.00	£0.00	£0.00
Colliers Wood	n/a	£41.58	£43.48	£46.84
Out-of-Centre Raynes Park	n/a	£22.11	£23.12	£24.91
Other Merton	n/a	£0.00	£0.00	£0.00
LB Merton Total	**n/a**	**£63.69**	**£66.60**	**£71.75**
D - Surplus Expenditure £M A - (B + C)				
Wimbledon	£2.00	£11.19	£34.86	£64.98
Mitcham	£0.86	£1.87	£4.62	£8.25
Morden	£3.51	£4.71	£7.42	£10.96
Colliers Wood	£0.71	£7.45	£25.84	£47.72
Out-of-Centre Raynes Park	£2.59	-£15.24	-£8.74	-£1.26
Other Merton	-£2.42	£3.20	£12.62	£24.79
LB Merton Total	**£7.25**	**£13.18**	**£76.63**	**£155.45**
E - Sales Density for New Floorspace £ PSM Net				
Wimbledon	£7,000	£7,320	£7,654	£8,246
Mitcham/Morden/Colliers Wood	£4,000	£4,183	£4,374	£4,712
Out-of-Centre Raynes Park	£2,500	£2,614	£2,734	£2,945
Other Merton	£3,500	£3,660	£3,827	£4,123
F - Retail Sales Floorspace Capacity Sq M Net				
Wimbledon	286	1,529	4,555	7,881
Mitcham	215	446	1,057	1,750
Morden	876	1,126	1,697	2,326
Colliers Wood	177	1,780	5,909	10,128
Out-of-Centre Raynes Park	1,035	-5,832	-3,199	-427
Other Merton	-690	875	3,299	6,014
F - Gross Retail Floorspace Capacity Sq M				
Wimbledon (70% net to gross)	409	2,184	6,507	11,259
Mitcham (70% net to gross)	307	637	1,510	2,500
Morden (70% net to gross)	1,252	1,609	2,425	3,323
Colliers Wood (70% net to gross)	253	2,544	8,441	14,469
Out-of-Centre Raynes Park (85% net to gross)	1,218	-6,861	-3,763	-502
Other Merton (70% net to gross)	-986	1,250	4,713	8,591

Sources: *Tables 2A, 3C to 7C*

Appendix D

Retail Assessment Methodology and Conclusions

Methodology and Data

The quantitative analysis is based on a study area defined for the four main shopping areas within the Borough i.e. Wimbledon, Mitcham, Morden and Colliers Wood (including Priory and Tandem Retail Parks). The study area is divided into 10 zones or sectors for more detailed analysis.

The study area is shown on Plan 1 in Appendix A, and is the same study area adopted in the 2005 Study. The extent of the study area is based on postcode area boundaries and the proximity of the major competing shopping destinations, i.e. Croydon, Kingston, Sutton, Streatham, Wandsworth, Clapham Junction and Central London. Shopping facilities within the study area are expected to attract most of their trade from residents within the study area, although there will be an element of trade drawn from beyond the study area.

The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for the study area for the year 2006 have been obtained. Expenditure data for 2007 and 2008 is not currently available and 2006 is the most up to date information. The 2005 Study was based on expenditure data for 2003 (i.e. data now three years out of date).

Experian provides recommended growth rates for the period 2006 to 2011, and 2006 to 2016. The recommended growth rates for the period 2006 and 2011 are 0.7% per annum for convenience goods and 3.8% per annum for comparison goods. These growth rates have been used in this study to forecast expenditure per capita up to 2011. Adjusted growth rates (0.9% and 3.2% per annum for convenience and comparison goods respectively) have been adopted to project expenditure between 2011 and 2016, consistent with Experian's overall growth forecasts for 2006 to 2016. Growth in expenditure beyond 2016 is based on 0.8% and 3.5% per annum for convenience and comparison goods respectively, in line with Experian's growth forecast for 2006 to 2016.

To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors including:

- information from the 2005 household survey results;
- the level, quality and distribution of retail facilities;
- changes in retail provision since 2005; and
- the relative distance between shopping centres and study area zones.

The total turnover of shops within the Borough is estimated based on expected penetration rates within each study area zone and the expected level of expenditure inflow from beyond the study area. These turnover estimates are converted into average turnover to sales floorspace densities. Turnover densities are compared with company average turnover to sales floorspace densities and benchmark turnover levels in order to identify potential surplus capacity.

Population and Spending

The study area population for 2001 to 2021 is set out in Table 1B in Appendix B, based on the 2001 Census and the GLA's 2007 ward level population projections (Post London Plan –

low estimates). Population in the study area is forecast to increase by 6.1% between 2001 to 2021, an additional 24,500 people. The 2005 Study was based on Office of National Statistics (ONS) 2003 population projections, which suggested much higher population growth, with 43,727 more people at 2016 than the GLA projections.

The levels of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both comparison and convenience spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.

Special Forms of Trading (SFT) and non-store activity is included within Experian's goods based expenditure estimates. *"Special forms of trading"* includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace.

The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian has attempted to provide projections for special forms of trading and E-tailing (Retail Planner Briefing Note 5.1 – November 2007).

This Experian information suggests that non-store retail sales in 2008 is:

- 5.6% of convenience goods expenditure; and
- 12.1% of comparison goods expenditure.

Experian predicts that these figures will increase to 7.3% and 14.4% by 2013, and will then stabilise thereafter.

For convenience expenditure 5% of the 5.6% is estimated to be E-tailing, and the rest 0.6% is other forms of SFT e.g. mail order. E-tailing in 2004 was broken down into E-tailing through retail businesses (e.g. Tesco and Sainsbury) at 1.1% and non-retail businesses (0.5%). The E-tailing split for retail and non-retail businesses was approximately 70:30 in 2004.

For comparison expenditure in 2008, 9.5% of the 12.1% is estimated to be E-tailing, and the rest 2.6% is other forms of SFT e.g. mail order. E-tailing through retail businesses (e.g. Next and Argos) was 1.3% and for non-retail businesses 1.8% (e.g. Amazon) in 2004. The E-tailing split for retail and non-retail businesses was approximately 40:60 in 2004.

Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including non-retail e-tailing but excluding E-tail through retail businesses) is 2.0% and 8.3% of total convenience and comparison goods expenditure respectively in 2008. The projections provided by Experian suggest that these percentages could increase to 2.5% and 9.2% by 2012. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.

As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 14.2% from £704.74 million in 2008 to £804.81 million in 2021, as shown in Table 3B.

Comparison goods spending is forecast to increase by 60.1% from £1,253.86 million in 2008 to £2,006.99 million in 2028, as shown in Table 2C. These figures relate to real growth and exclude inflation.

Retail Floorspace

Existing convenience goods retail sales floorspace in the Borough is 35,535 sq m net as set out in Table 1A, Appendix A (excluding the proposed M&S food hall at Collier Wood). This floorspace figure excludes comparison sales floorspace within food stores (estimated to be 5,807 sq m net). The amount of convenience sales floorspace has decreased slightly since 2005 due to the downsizing of the Sainsbury store at Colliers Wood. Mark & Spencer is currently fitting out a new store with a new mezzanine floor in the Sainsbury unit. We understand this store is likely to have a total sales area of about 9,500 sq m net (102,000 sq ft), and this will include a food hall. Based on other similar sized stores the food hall could have a sales area of about 1,500 sq m net. The proposed Marks & Spencer food hall will increase the convenience sales floorspace to 37,035 sq m net.

Comparison goods sales within the Borough including out-of-centre retail warehouses and comparison goods sales floorspace in food stores is set out in Table 2A, Appendix A. Total identified comparison sales floorspace is estimated to be 96,412 sq m net, down from 108,322 sq m net in 2005. This reduction is due to the downsizing of the Sainsbury store at Colliers Wood and also the demolition of retail warehouses at Shannon Corner, where a large B&Q store is now under construction. The proposed Marks & Spencer store at Colliers Wood, the B&Q at Shannon Corner and other commitments are expected to increase the total amount of comparison sales floorspace in the Borough to 115,557 sq m net.

Spending Patterns 2008

Convenience Shopping

The results of the household shopper survey undertaken in 2005 have been adopted to estimate shopping patterns within the study area at 2008. More recent household survey results for 2007 adopted within Wandsworth Council have also been used to validate shopping patterns in the northern half of the study area. In general the shopping patterns recorded in 2005 are not expected to have changed significantly.

The estimates of market share or penetration within each study area zone are shown in Table 4B, Appendix B. The level of convenience goods expenditure available for all shops in LB of Merton at 2008 is £321.14 million, as shown in Table 5B, Appendix B.

Company average turnover to sales floorspace densities are available for major food store operators. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 1A, Appendix A, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a helpful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A, for consistency with the use of goods based expenditure figures.

Average sales densities are not widely available for small convenience shops, particularly independent retailers. We have assumed an average of £4,000 per sq m net for other small convenience shops within the Borough. The total convenience goods benchmark turnover of all identified food stores/convenience floorspace (including the proposed M&S food hall at Colliers Wood) is £271.35 million, as shown in Table 1A, Appendix A. The estimates of available convenience expenditure are summarised and compared with the benchmark turnover in Table 1 below.

Overall convenience retail sales floorspace within Merton appears to be trading very healthily in 2008, significantly above the benchmark turnover level.

Table 1: Convenience Trading Levels in 2008 (£ millions)

	Available Expenditure	Benchmark Turnover	Difference
Wimbledon town centre	83.76	60.59	+23.17
Mitcham town centre	27.16	21.45	+5.71
Morden town centre	28.73	25.12	+3.61
Colliers Wood*	53.65	60.91	-7.26
Tesco Extra, New Malden	64.73	55.48	+9.25
Other LB of Merton	63.11	47.80	+15.31
TOTAL	**321.14**	**271.35**	**+49.79**

Source: Table 1A (Appendix A) and Table 5B (Appendix B) ** incl. the proposed M&S food hall*

Comparison Shopping

The results of the household shopper survey undertaken in 2005 have again been used to estimate 2008 shopping patterns within the study area. The estimated available comparison goods expenditure for facilities in Merton Borough at 2008 is £434.83 million, as shown in Table 3C, Appendix C.

Average sales densities for high street comparison shops can typically range from £3,229 to £7,535 per sq m net (£300 to £700 per sq ft). The higher end of this range is usually only achieved by large successful shopping centres, which reflects the higher proportion of quality multiple retailers. In the 2005 Study an average of £7,000 per sq m was adopted for comparison shops in Wimbledon town centre, and £4,000 per sq m net was adopted for the other three main centres (2003 prices). These turnover density estimates have been adopted for 2008. Real growth in turnover efficiencies between 2003 and 2008 will have been offset by deflation on comparison goods i.e. 2006 prices when compared with 2003 prices.

For comparison floorspace in food stores and retail warehouses the company average sales density of the individual food store has been adopted based on information available from Mintel and Verdict Research. The total *benchmark* turnover for existing comparison floorspace in the Borough is £427.58 million, as shown in Table 2A, Appendix A. Available expenditure at 2008 and the benchmark turnover are compared in Table 2.

Table 2: Comparison Trading Levels in 2008 (£M)

	Available Expenditure	Benchmark Turnover	Difference
Wimbledon	177.06	175.06	+2.00
Mitcham	22.15	21.29	+0.86
Morden	21.07	17.56	+3.51
Colliers Wood*	89.24	88.53	+0.71
Raynes Park: Out-of-centre	54.25	51.66	+2.59
Other Merton	71.06	73.48	-2.42
TOTAL	**434.83**	**427.58**	**+7.25**

Source: Table 2A (Appendix A) and Table 3C (Appendix C) ** excl. the proposed M&S store*

Overall comparison retail sales floorspace within Merton appears to be trading healthily in 2008, around the adopted benchmark turnover level.

Quantitative Capacity for Convenience Floorspace

The levels of available convenience goods expenditure in 2011, 2016 and 2021 are shown in Tables 7B, 8B and 9B in Appendix B, and summarised in Table 10B. These tables adopt adjusted market penetration rates within the study area shown in Table 6B. The main changes affecting future convenience market shares is the proposed implementation of the Tesco food store in Streatham (Zone 8) and the proposed food hall within the Marks & Spencer store at Colliers Wood.

The benchmark turnover of existing convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates, as shown in Table 10B, Appendix B.

Table 10B assumes that the benchmark turnover of existing convenience floorspace within the Borough will increase in real terms in the future, an increase of 0.3% per annum. PPS6 indicates that retail studies should assess the potential for existing floorspace to increase its productivity in the future.

Historically, limited or no growth in turnover density has been assumed by most retail planners for convenience floorspace. However, recent information published by Experian recommends a growth rate of 0.75% per annum for convenience businesses. This growth rate is a combined figure for both food and non-food floorspace within food stores. Experian's recommended growth rate for comparison floorspace (non-food) is much higher than for convenience floorspace, i.e. between 2% to 2.5%. If Experian's higher growth rate for comparison floorspace (2% to 2.5%) is adopted for comparison floorspace within food stores then it follows that the appropriate growth rate for convenience sales floorspace only will be much lower than 0.75%. On this basis, we believe that a growth rate of 0.3% is appropriate for convenience sales floorspace only.

The surplus expenditure projections are converted into potential new floorspace, also shown in Table 10B Appendix B. The figures assume that 85% of surplus expenditure associated with the four main centres will be accommodated in food stores (i.e. stores with a net sales floorspace of at least 200 sq m net) and an average sales density of £10,000 per sq m net has been adopted (inflated by 0.3% per annum up to 2021). The remaining 15% of surplus expenditure is expected to be accommodated in small stores/shops (under 200 sq m net), and an average sales density of £5,000 per sq m net has been adopted. For other shopping facilities including local shops 50% of surplus expenditure is expected to be accommodated in food stores over 200 sq m net. This expenditure split and average sales density broadly reflects the current mix of large stores and small shops in the Borough. The sales density figures are based on the existing benchmark sales densities shown in Table 1A.

The surplus expenditure figures indicate that further convenience retail development could be supported in Merton Borough, taking into account the proposed Tesco commitment in Streatham and the new Marks & Spencer food hall in Colliers Wood. The sales floorspace projections at the bottom of Table 10B Appendix B, suggest that about 5,300 sq m net of food store floorspace could be accommodated in the Borough by 2016 and about 2,900 sq m net in smaller stores/shops, or about 8,200 sq m net in total.

The comparable 2016 floorspace projection in the 2005 Study was similar (8,700 sq m net). Projected convenience expenditure available for facilities in the Borough at 2016 is lower than previously forecasts, primarily because the GLA population projections are lower than the ONS projections. However, the implications of lower population/expenditure have been offset by a reduction in the company average benchmark turnovers of the main food store operators.

Quantitative Capacity for Additional Comparison Floorspace

Comparison Shopping

We have projected comparison goods expenditure available to shops in the Borough at 2011, 2016 and 2021 as shown in Tables 5C, 6C and 7C in Appendix C. These tables are based on the 2008 market penetration rates within the study area shown in Table 3C, but also take into account the impact of the proposed Marks & Spencer store at Colliers Wood.

The proposed Marks & Spencer store is expected to have about 8,000 sq m net of comparison sales floorspace (excluding the food hall area). Based on the company average sales density this comparison sales floorspace would have a total turnover of £40.3 million. The anticipated trade draw of the store is shown in Table 4C Appendix C, and is expected to draw trade from across the study area and beyond. This expected trade draw has been adopted to assess the store’s impact on future shopping patterns at 2011, as shown in Table 5C in Appendix C.

From 2011 onwards, market shares are assumed to remain constant on the basis that improvements to comparison shopping provision in the Borough will be counter-balanced by emerging developments in neighbouring Boroughs. The uplift in Colliers Woods market share following the implementation of the Marks & Spencer store is also expected to remain constant from 2011 to 2021.

The growth in comparison goods expenditure available for shops in the Borough between 2008 and 2021 is summarised in Table 8C, in Appendix C. Future available expenditure is compared with the projected turnover of existing retail floorspace and commitments in order to provide estimates of surplus expenditure. This table takes into account the population and expenditure projections shown in Table 1B, 1C and 3C in Appendix B and C.

Surplus expenditure projections are converted into new comparison goods floorspace at the bottom of Table 8C Appendix C. New floorspace is expected to have an average sales density of £7,000 per sq m net in Wimbledon town centre, £4,000 per sq m net in Mitcham/Morden and Colliers Wood and £3,500 for other areas of the Borough, inflated by 1.5% per annum up to 2021.

Table 8C assumes that the benchmark turnover of existing and new comparison floorspace within the Borough will increase in real terms in the future, an increase of 1.5% per annum. Historically a growth rate of between 1% to 1.5% per annum has been widely adopted by retail planners.

Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Allowing for this growth to be absorbed by existing retailers represents a cautious approach to forecasting future needs, and this allowance may help existing centres maintain their vitality and viability in the future. It effectively allows for existing retail outlets to increase their turnover to help them to compete with new provision. Recent information provided by Experian recommends a slightly higher growth rate of between 2% to 2.5%. However, we believe this recommended range of rates is too high for centres that are already trading healthily, primarily for the following reasons:

- Experian's growth rate is based on past trends during the period 1986 to 1999. During this period comparison expenditure grew rapidly (5.8% per annum). The forecast rate of growth in comparison expenditure adopted in this study is much lower (about 3.8%). Growth in turnover efficiencies and expenditure growth are inextricably linked, therefore it is unlikely that the Experian recommended growth in turnover efficiencies (2% and 2.5%) will be experienced if future growth in expenditure is only 3.8% per annum.

- an element of the past growth in turnover efficiency between 1986 and 1999 will have related to a qualitative improvement in the overall stock of retail floorspace, i.e. the development of modern shopping centres and out-of-centre stores. As a result it would be wrong to assume that existing retail floorspace can increase its turnover efficiency at the same rate as suggested by national figures.

- Experian's growth rate is based on gross floorspace rather than net sales. Therefore, an element of the past growth in turnover density will relate to improvements in net to gross ratios e.g. reductions in storage. It does not follow that improvements to net to gross ratio will continue at the same rate in the future.

Furthermore existing comparison sales floorspace in the Borough appears to be trading satisfactorily. For these reasons, we have adopted a turnover efficiency of 1.5% per annum, slightly lower than the range recommended by Experian, and consistent with the top end of the range historically adopted by retail planners.

By 2011, estimated comparison expenditure is projected to exceed the benchmark turnover of existing and proposed floorspace in the Borough by £13.18 million, as shown in Table 8C in Appendix C. This figure is over and above the proposed Marks & Spencer store at Colliers Wood. By 2016, estimated comparison expenditure is projected to exceed the benchmark turnover by £76.63 million, increasing to £155.45 million in 2021.

These surplus expenditure figures indicate that further comparison floorspace development can be supported in the Borough in the short to medium term. The floorspace projections in Table 8C Appendix C, suggest that about 16,500 sq m net (23,600 sq m gross) could be accommodated in the Borough by 2016, increasing to 28,100 sq m net (40,100 sq m gross) by 2021.

The comparable 2016 floorspace projection in the 2005 Study was 35,000 sq m net, which is significantly higher than the revised projection (16,500 sq m net). The main reasons for this difference are:

- the 2005 Study projections did not make an allowance for the proposed Mark & Spencer store at Colliers Wood (8,000 sq m net);

- the GLA based study area population projections for 2016 are 5.4% (23,795 people) lower than the ONS 2003 projections adopted in the 2005 Study;

- Experian's average comparison expenditure per capita estimate (based on actual national data for 2006) for the study area at 2008 (£3,044) is about 18% lower than the projected figure (£3,706) adopted in the 2005 Study (based on national data for 2003 projected to grow at 4.4% per annum up to 2008). This suggests that actual growth in expenditure between 2003 and 2006 has been lower than previously forecast. In addition the proportional reduction for special forms of trading including home shopping is now higher 8.3% in 2008 rather than 6.4%.

Impact of the Mark & Spencer Store at Colliers Wood

The proposed Marks & Spencer store now under construction at Colliers Wood is expected to have a total annual turnover of £56.92 million (£16.62 million for convenience goods and £40.30 million for comparison goods). In relation to convenience goods shopping the proposed Tesco store at Streatham is expected to have a more significant impact on shopping patterns in the study area than the Marks & Spencer food hall. The Tesco store is expected to attract £32.54 million form the study area (as shown in table 7B Appendix B).

The cumulative impact of the Marks & Spencer food hall and the proposed Tesco store at Streatham in 2011 is as follows:

- Wimbledon town centre -£2.21 million (2.5% impact);
- Mitcham town centre -£0.92 million (3.3% impact);
- Morden town centre -£0.84 million (2.8% impact);
- Colliers Wood (incl. Sainsbury) -£9.46 million (30% impact);
- Tesco Extra New Malden -£1.09 million (1.6% impact);
- Other Merton -£1.87 million (2.9% impact);
- Other in study area* -£26.13 million.

* primarily food stores in LB Wandsworth and LB Lambeth, with most trade diversion attributed to Tesco, Streatham.

The level of trade diversion and cumulative impact on Wimbledon, Mitcham and Morden will largely be offset by convenience expenditure growth between 2008 and 2011, and should not harm the commercial viability of food store in these centres. The Sainsbury store in Colliers Wood will experience a reduction in convenience turnover. However, projected expenditure in Colliers Wood suggests the Sainsbury store will continue to trade at satisfactory level in 2011. The impact of the comparison floorspace within the Marks & Spencer store at 2011 is as follows:

- Wimbledon town centre -£7.49 million (3.7% impact);
- Mitcham town centre -£0.56 million (2.3% impact);
- Morden town centre -£0.40 million (1.7% impact);
- Out of centre Raynes Park -£0.65 million (1.1% impact;
- Other Merton -£0.42 million (0.5% impact);
- Other in study area -£4.02 million.

The level of trade diversion and cumulative impact on Wimbledon, Mitcham and Morden will again be more than offset by comparison expenditure growth between 2008 and 2011, and the Marks & Spencer store should not harm the commercial viability of any other centres. Comparison trade diversion will be spread amongst a large number of shopping destinations.