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Planning Design Economics

Retail and Town Centre Capacity Study 2011

London Borough of Merton

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FINAL REPORT

Technical report for consideration by the London Borough of Merton. This document does not constitute Council policy.

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1.0 Executive Summary

Purpose of the Study

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by Merton Borough Council to prepare a retail and leisure study, including an assessment of the main centres: Wimbledon, Colliers Wood, Mitcham and Morden and local centres. The study assesses the future need for additional retail, commercial leisure facilities and other town centre uses. The study includes:

- a survey of 1,000 households within Merton and parts of neighbouring authorities;
- a street survey of 306 visitors to the four main centres;
- a survey of 200 businesses in the four main centres and local centres;
- a canvas of over 300 national multiple operators; and
- key stakeholder feedback.

Survey Findings

1.2 Large food stores (over 1,000 sq m net) are the primary destinations for main food shopping. Generally residents visit stores near to their home, and a relatively high proportion of people walk to buy food and grocery items. Most households also undertake small scale shopping or top-up shopping trips.

1.3 Food and non-food shopping are both important reasons why visitors are attracted to the main centres in Merton. The average expenditure on food shopping was highest in Mitcham followed by Wimbledon and Morden. Colliers Wood had the highest average spend per visitor on comparison (non-food goods) followed by Wimbledon and Mitcham. Wimbledon town centre is the dominant shopping destination in the north of the Borough for most types of non-food goods. Kingston is the dominant destination in the west of the Borough (Raynes Park) area, with Sutton dominant in the south west (Morden area) and Croydon in the south east (Mitcham area). Residents in the Borough have a wide choice of shopping destinations both within and in adjoining Borough, and the catchment areas of these destinations overlap. As a result shopping patterns are complex.

1.4 The four main centres were rated by visitors against 19 separate aspects. Colliers Wood (positive scores for 14 out of 19 aspects) and Wimbledon (positive scores for 17 out of 19 aspects) achieved the highest overall scores and Morden achieved the lowest score (negative positive scores for 15 out of 19 aspects). Key concerns amongst visitors raised in all centres related to traffic congestion, public toilets and entertainment in the evenings (except Wimbledon). Overall the main improvements respondents in all centres would like to see include improving the range/quality of specialist shops, the range of multiple retailers and improvements to the appearance of the centre.

1.5 Participation for all leisure activities generally high i.e. cinemas, tenpin, bowling, bingo, theatre, nightclub, bars and restaurants. Residents in the Borough visit facilities within Merton and neighbouring boroughs. Central London is also a popular destination.

1.6 The four main centres were rated by business occupiers against 19 separate aspects. Wimbledon (positive scores for 15 out of 21 aspects) and Colliers Wood (positive scores for 13 out of 21 aspects) achieved the highest overall scores and Mitcham achieved the lowest score (negative positive scores for 19 out of 21 aspects). Key concerns amongst businesses raised in all centres related to availability of car parking, rents/rates and traffic congestion. Overall the main measures suggested to help businesses in all centres include improving car parking, better security (CCTV/police), better marketing/promotion/events and an effect town centre forum.

1.7 Views on trading performance amongst occupiers were mixed, but the highest proportions of respondents reporting declining trade over the past 12 months were in Morden and Colliers Wood. However, the majority of occupiers in all centres were optimistic about future trading levels over the next 12 months.

The Potential for Retail Development

Convenience Goods (Food and Grocery)

1.8 An assessment of available expenditure and existing shopping patterns suggests that convenience goods sales floorspace within Merton are collectively trading about 13% above the expected levels, over £40 million above average.

1.9 Food store provision in the Borough and the wider study area is good in terms of the number of stores and spatial distribution. In qualitative terms some of the existing stores do not offer the full range and choice of products available in large superstores. In qualitative terms, the main locational area of deficiency in large food store provision within Merton is within the Mitcham and Morden areas in the south of the Borough.

1.10 The quantitative capacity analysis indicates there is potential for additional convenience goods sales floorspace within Merton Borough. Surplus expenditure at 2016 could support 2,900 sq m net of convenience sales floorspace increasing to 4,600 sq m net at 2021, over and above commitments. The 2026 projection is 6,200 sq m net.

Comparison Goods (Non-food Durable)

1.11 Residents in the Borough have a large choice of shopping destinations both within and outside the Borough. Households in the Borough mainly undertake their non-food shopping in Wimbledon, Colliers Wood, Kingston, Croydon, Sutton or Central London. Wimbledon town centre has a good range of comparison shops including many national multiples and independent specialists. These shopping facilities are complemented by large format stores at Colliers Wood. Wimbledon and Colliers Wood are supported by Mitcham and Morden town centres and local centres within the Borough, but these smaller centres have a much more limited range of multiple retailers, but have a selection of specialist independent retailers. Wimbledon and Colliers Wood are likely to remain the main comparison shopping destinations within the Borough.

1.12 The provision of retail warehouses in the Borough is relatively good, with the main concentrations at Colliers Wood and Shannon Corner. The Borough's residents have good access to retail warehouses.

1.13 The quantitative capacity analysis indicates that surplus expenditure at 2016 could support about 15,200 sq m net of comparison sales floorspace (20,300 sq m gross) increasing to 33,200 sq m net (44,200 sq m gross) up to 2021. The 2026 projection is 53,200 sq m net (72,700 sq m gross).

1.14 These floorspace projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available.

Commercial Leisure and Entertainment Facilities

1.15 Residents in the Borough have relatively good access to range of commercial leisure, entertainment and cultural facilities, including facilities in neighbouring Boroughs and Central London. Most of the key sectors are represented.

1.16 There may be potential for additional private health club facilities in line with population growth and this may increase in the future if membership rates increase. GLA forecasts suggest there is a need for about 300 more hotel rooms in the Borough by 2021 (Source: GLA Hotel Demand Study June 2006).

1.17 The Borough's main centres have a reasonable provision of Class A3 to A5 uses, particularly A5 takeaways. There is no overriding need for the A3 to A5 sector to expand in any centre, although the quality of Class A3 restaurants and the evening economy are poor in some centres.

Accommodating Growth

1.18 There is scope for about 62,000 sq m gross of retail floorspace (Class A1 to A5) by 2021. Designated centres should be the first choice for this additional floorspace. Vacant premises within designated centre could help to accommodate growth in the short term. The strategy should seek to reduce vacancy levels from just over 9% to 5% and these reoccupied units could accommodate about 8,000 sq m gross of commercial space.

1.19 Development opportunities need to be identified to accommodate about 54,000 sq m gross up to 2021. The main opportunities could include:

1. Broadway Extension, Wimbledon;
2. YMCA The Broadway, Wimbledon;
3. Land to rear of Morden Underground, Morden;

4 Land east of Western Road, Mitcham; and

5 Land east of Holborn Way, Mitcham.

1.20 In the longer term other key development opportunities include Bridge House in Wimbledon and redevelopment of Colliers Wood to provide a more coherent centre.

1.21 The development of new Class A floorspace has the potential to generate significant S106 contributions that could be used to improve the take up of vacant shop units where occupier demand is low or to promote diversity where demand/property costs are high. Shop improvement grants or subsidies for business rate contributions could be introduced and funded by S106 contributions.

The Role of Centres

1.22 Wimbledon town centre is the main centre within the Borough, with Colliers Wood, Mitcham and Morden all ranked significantly lower in the retail hierarchy. Wimbledon town centre is the main comparison shopping destination and its position in the hierarchy needs to be maintained if shopping is to be retained in the Borough. Colliers Wood is also an important comparison shopping destination, but primarily due to the large retail parks and Marks & Spencer store, which do not provide an integrated and well connected centre.

1.23 Food and grocery provision is more dispersed and the network of town/district/local centres and local parades ensure all residents have good levels of accessibility to these day to day facilities.

1.24 The existing provision of local shopping centres within the Borough (local centres and parades) offers a balanced distribution of local facilities serving local communities. These facilities complement the four main centres and have an important role in serving the day-to-day needs in their local areas.

1.25 Most of the Borough's centres are vital and viable. Morden and Mitcham are the most vulnerable centres, where enhancement and regeneration would be beneficial. A pro-active approach may be required to attract investment and redevelopment in Morden, Mitcham, Colliers Wood and local centres. Development outside designated centres will need to be controlled in order to maximise the prospects for investment within centres.

1.26 The emerging Core strategy identifies Wimbledon as a Major Centre and Mitcham and Morden as District Centres. Colliers Wood is a proposed new district centre following re-designation. Five local centres are identified including Raynes Park and Wimbledon Village. These designations are consistent with PPS4 and the London Plan and there is no need to re-classify any of these centres.

1.27 The recommendations and projections within this study are expected to assist the Council in preparing development plan policies over the coming years and to assist development control decisions during this period.

Future Strategy Implementation and Monitoring

1.28 The study provides a broad overview of the potential need for further retail and leisure development. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available. In particular long-term projections up to 2026 should be treated with caution.

1.29 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the Borough, as follows:

- application of guidance within PPS4, particularly relating to the sequential approach and impact tests in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres.
- maintaining the generally high quality environment within each centre;
- bring forward development opportunities through the LDF process to improve the availability of modern premises suitable for new occupiers.
- pro-active approach to site assembly which may require the use of compulsory purchase powers.

1.30 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions.

1.31 Therefore, we would recommend that this retail/leisure capacity study should be updated in 4-5 years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Management Horizons, Retail Ranking); and
- implemented development within and around the study area.

2.0 Introduction

2.1 Nathaniel Lichfield and Partners (NLP) has been commissioned by the London Borough of Merton to prepare a Retail and Town Centre Capacity Study. This study provides a review and update of the Merton Town Centre Study (2005) and the subsequent update of this Study in 2008, both prepared by NLP.

2.2 The key objective of the Retail and Town Centre Capacity Study will be to provide a robust and credible evidence base to inform the Council's work on the next stages of the Local Development Framework process, taking into account changes since the previous studies. The objectives of the study will be to:

- assess the future need and (residual) capacity for retail, distributed by town centre for the period up to 2026;
- assess the existing supply and demand for retail and other town centre uses and the role played by each of the centres;
- review the existing retail hierarchy and identify any deficiencies in the network including, where appropriate, the scope for extending the primary shopping area and/or town centre;
- assess the implications of the planned scale of population growth;
- identify, where appropriate, the scope and implications for accommodating potential growth and meeting the identified need; and
- provide advice on policies to be included in LDF documents to address future needs.

2.3 The findings of this report will need to be monitored particularly in terms of the recovery from the recent recession. An update is likely to be required in 4-5 years.

2.4 Section 3.0 provides an overview of retail and commercial leisure trends. Section 4.0 provides a description of the hierarchy of centres.

2.5 Sections 5.0 and 6.0 set out an analysis of shopping and commercial leisure needs within Merton. Section 7.0 assesses the opportunities to accommodate the future need for new retail and leisure development. Options for affordable retail premises are explored in Section 8. Section 9.0 sets out recommendations and conclusions.

3.0 Retail and Commercial Leisure Trends

Introduction

3.1 An assessment of the need for retail and leisure facilities in Merton is set out in Sections 17 and 18 of this report. In the section below, we provide an overview of trends within the retail and leisure sectors.

Retail Trends

3.2 Past retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth over the next few years.

3.3 In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980s and 1990s. The economic downturn suggests that recent rates of growth during the past few years are unlikely to be achieved in the short term. However, the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. We anticipate these national trends will be mirrored in Merton.

3.4 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. Trends within this sector may well have implications for retailing within Merton. 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. Merton is a relatively affluent area and we would anticipate that the levels of internet connections are high, and therefore growth in home shopping needs to be considered.

3.5 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector. However, there is still uncertainty about its longer-term prospects and the potential effects on the high street.

3.6 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats. For example, some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco Metro, Sainsbury Central/Local store and Marks and Spencer's Simply Foods formats.

Food operators have also entered the local convenience store market, for example Tesco Express store and convenience stores linked with petrol filling stations. The entrance of European discount food operators such as Aldi, Lidl and Netto has also been rapid during the last decade, and this trend has been evident in Merton i.e. Lidl in Morden and Mitcham and Netto in Mitcham.

3.7 Food store operators have also commenced a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.

3.8 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised including a number of mergers, e.g. there are fewer DIY operators, following the acquisition of Do It All, Great Mills and Wickes by Focus DIY. B&Q and Homebase developed very large ‘category killer’ retail warehouses (some exceeding 10,000 sq m gross), but more recently have scaled down or closed their stores. Other traditional high street retailers have sought large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre.

3.9 The economic downturn has had, and is likely to continue to have, an impact on the retail sector, e.g. Woolworth, Borders and MFI are notable victims. Many town centre development schemes have been delayed and the demand from traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

3.10 Within town centres, some high street multiple comparison retailers changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m - 2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends may also influence future operator requirements in Merton. National multiples may prefer to locate in larger centres e.g. Kingston, Croydon, Westfield and London’s West End, which may constrain demand in Merton. Wimbledon followed by Colliers Wood will probably have better prospects for attracting multiple retailers than Morden, Mitcham and the local centres.

Leisure Trends

3.11 The demand for commercial leisure facilities has increased significantly during the last 20 years. The growth in the commercial leisure sector was particularly strong during the late 1980s and again in the mid 1990s. Average household expenditure on leisure services increased in real terms by 93% between 1984 and 1995 (source: Family Expenditure Survey), and by a further 48% between 1995 and 2005, but growth has been slower since 2005. The latest (2009) average household expenditure on leisure services is nearly £4,000 p.a. Many analysts consider that the commercial leisure market has now reached saturation in some sub-sectors, e.g. bingo, multiplex cinemas and tenpin bowling.

3.12 The mid-1990s saw the expansion of major leisure parks. These leisure parks are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants, children's nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or out-of-centre, with good road access. Many leisure uses have also emerged on retail warehouse parks.

3.13 The cinema market remains an important sector because they anchor leisure developments, providing footfall for other uses. Growth in this sector has slowed with many areas reaching saturation levels. Many cinema operators have suspended or curtailed their expansion plans. Some cinema operators such as City Screen, Mainline Pictures and Reeltime Cinemas have opened new or taken over small cinemas in recent years. The expansion of other sectors has slowed, including ten-pin bowling and bingo. However, other sub-sectors have remained strong in recent years, in particular the private health and fitness market, with a number of multiple operators seeking premises across the UK, e.g. LA Fitness, Fitness First and Esporta. Nevertheless, the health and fitness sector is also reaching saturation point in some areas and is likely to be affected by the current down turn in the economy.

Summary

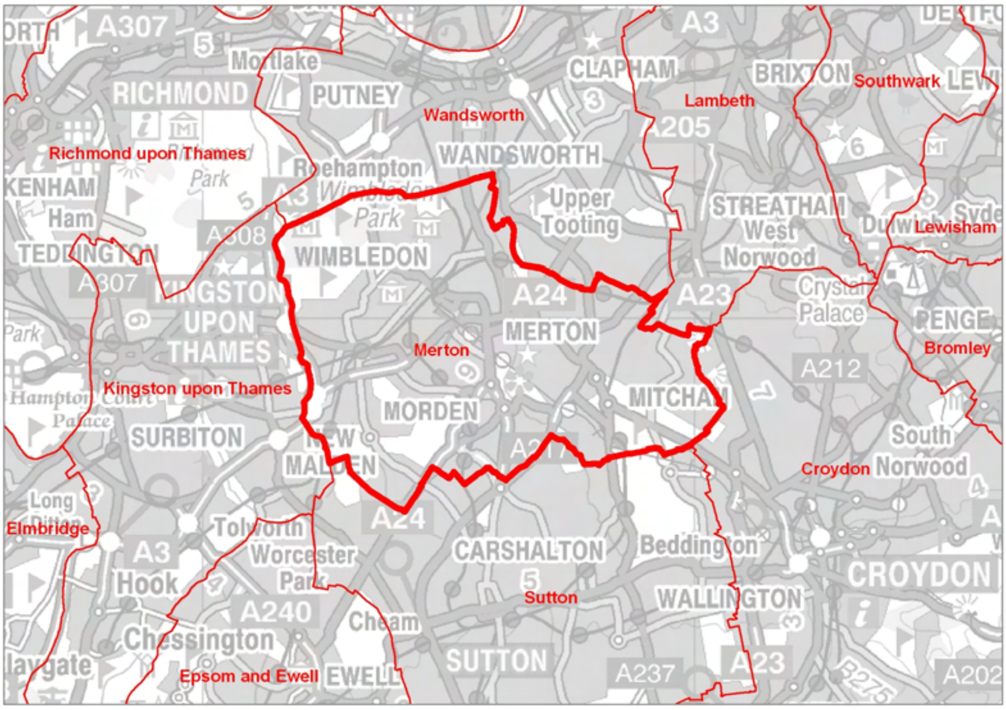
- In the medium/long term the underlying economic trend is expected to lead to a need for new retail floorspace. Merton should plan for this accordingly.
- Whilst there is still uncertainty about the longer-term prospects for home and internet shopping, and its potential effect on the on the high street, LB Merton may need to adopt future policies that maintain the vitality and viability of shopping centres against the this increasing trend.
- Other changes in retail trends include the introduction of major foodstore operators entering the local convenience market; the increase in comparison goods being sold from supermarkets; rationalisation of bulky good retailers and increase in the demand for out of centre units from major national multiple retailers.
- The recession is continuing to have an effect with major development schemes being delayed and national multiple retailers entering administration.
- Retail operators are responding to the recession through changing its operational requirements. LB Merton may have to respond to the demand for reconfigured retail floorspace within the borough.
- The demand for leisure facilities has increased during the last 20 years.

4.0 The Shopping Hierarchy

Centres in Merton and the Surrounding Area

4.1 The Borough of Merton lies in south London within the Wandle Valley. It is bounded by the outer London Boroughs of Kingston-on-Thames to the south west, Sutton to the south, and Croydon to the south east with the Borough of Richmond-on-Thames also lying nearby to the north west. The inner London Boroughs of Wandsworth and Lambeth lie to the north and north east respectively (Figure 4.1).

Figure 4.1 Sub-regional context of Merton



4.2 Wimbledon and Colliers Wood are the main shopping centres within Merton Borough, followed by Morden and Mitcham and the Local Centres of Raynes Park, Wimbledon Village, Motspur Park, North Mitcham and Arthur Road. Wimbledon and Colliers Wood attract shoppers from across the Borough, while Morden, Mitcham, Raynes Park, Motspur Park, North Mitcham and Arthur Road perform a more local shopping function, with a more limited range of comparison goods retailers. Wimbledon Village attracts high end retailers complemented by independent cafés and restaurants. The centres compete with major shopping destinations outside the Borough, including Kingston, Croydon, Sutton, Wandsworth, London Westfield and London's West End, particularly for comparison retailing.

4.3 Management Horizons Europe's UK Shopping Index 2008 ranks retail centres across the country. Each centre is given a weighted score for multiple retailers present i.e. each retail multiple is given a score related to its importance e.g. a department store has a higher score than other high street retailers. The MHE score does not necessarily reflect the overall size of the town centre or the number of shops, but the presence of national multiples. Towns with a larger number of independent shops may have a low MHE in relation to their overall size. Management Horizon's rank for centres in Merton and nearby centres outside the Borough is shown in Table 4.1 below.

Table 4.1 Management Horizons Europe Shopping Index (2008)

Centre	Rank	MHE Index Score
London, West End	1	1143
Kingston On Thames	15	386
Croydon	20	349
Bluewater	25	321
Bromley	32	300
Wimbledon	**70**	**239**
Sutton	78	228
Kensington	103	204
Richmond Upon Thames	131	181
Putney	160	165
Clapham Junction	204	138
Tooting	271	111
Wandsworth	278	109
Streatham	314	100
Brixton	350	92
Balham	570	60
New Malden	711	50
Mitcham	**766**	**47**
Battersea	816	44
Colliers Wood *	**874**	**41**
Morden	**943**	**38**
Wimbledon Village	**1175**	**31**
Clapham High Street	1,207	30
Carshalton	1364	26
Raynes Park	**1364**	**26**

*Source: Management Horizon Europe 2008 * includes Priory RP but not Tandem RP*

4.4 This index ranks Wimbledon as the main centre in Merton and is ranked 70th of all centres in the UK, followed by Mitcham which is ranked 766th, but the Colliers Wood score excludes the Tandem Retail Park. London West End is ranked 1st, at the top of the shopping hierarchy. Bluewater, Kingston Upon Thames and Croydon are all ranked well above Wimbledon and other centres within Merton. Morden is ranked 943rd reflecting its relatively local role and function in comparison with other centres in the area.

4.5 The relative performance and importance of town centres can be demonstrated by reviewing commercial yields and Zone A rental levels achieved for retail property. Retail yields for the established centres in the sub-region are shown in Table 4.2 and comparison of Zone A rental levels is shown in Table 4.3.

Table 4.2 Retail Yields in Merton and other Centres

Centre	Yield%								
	2000	2001	2002	2003	2004	2005	2006	2007	2008
West End	5	5.25	5.25	5.25	5.25	5.25	5	4.5	4.25
Kingston	4.25	4.25	4.25	4.25	4.25	4.25	4.25	4.25	4
Croydon	5.5	5.5	5.5	6	6	6	6	6	6
Bromley	5.25	5.25	5.5	6	6	6	6	6	6
Wimbledon	7	7	7	7	7	6.5	6.5	6.5	5
Sutton	8	8	8	8	7.5	7.5	7.5	7.5	7.5
Kensington	6.25	6.25	6.25	6.25	6.25	6.25	6.25	6	6
Richmond	4.5	4.5	4.5	4.5	4.5	5	5	5	6
Putney	6.5	6.5	6.5	6.5	6.5	6.5	6.25	6.25	5.5
Clapham Junction	7.25	7.25	7.25	7.25	7.25	7.25	7.5	7.25	7.5
Tooting	8	8	8	8	8	8	8	7.5	7
Streatham	10	9.5	9	8.5	7.5	7.5	7.5	7.5	8.25
Brixton	9	8.5	8	7.5	7.5	7.5	7.5	7.5	8.25
Balham	8.5	8.5	8.5	8.5	8.5	8.5	8	8	7.5
Mitcham	_	_	_	_	_	_	_	_	_
Morden	9	9	9	9	9.5	9.5	>=10	>=10	>=10
Colliers Wood	_	_	_	_	_	_	_	_	_
Wimbledon Village	_	_	_	_	_	_	_	_	_
Raynes Park	_	_	_	_	_	_	_	_	_

Source: Valuation Office (July 2008)

4.6 Commercial yields are a measure of property values, which enables the values of properties of different size, location and characteristic to be compared. The level of yield broadly represents the market's evaluation of risk and return attached to the income stream of shop rents. Broadly speaking low yields indicate that a centre is considered to be attractive and, as a result, more likely to attract investment and rental growth than a centre with high yields. The Valuation Office Agency (VOA) records trend data relating to retail yields in established centres. It should be noted that the reporting of locations with a yield of 10% or over throughout the time series are not included on the assumption that such locations are not of major interest in terms of retail property investment. The only centres within Merton where yield data is published by the VOA are Wimbledon and Morden. There is no published data for other centres in the Borough.

4.7 The yield information reflects each centre's position within the wider retail hierarchy, i.e. larger centres have lower yields than smaller centres. Higher yields do not necessarily indicate a smaller centre is performing badly or that the centre is not vital and viable.

4.8 Yields are lower in Wimbledon in comparison with Morden, which suggests that the property market is slightly stronger in Wimbledon. The table also shows that, in terms of yields, Wimbledon has improved since 2000, while Morden has worsened slightly. The higher order centres of London West End and Kingston have lower yields than the centres within Merton, indicating the attraction of these centres. Wimbledon has a lower yield than a number of other comparable centres in the sub-region, including Kensington, Croydon and Sutton, which reflects its relative strength in the region. Since the 2005 Study was produced, Wimbledon's yield has improved from 6.5% to 5%, however, Morden's yield has worsened from 9.5% to over 10%. This implies there are disparities in the performance of centres within the centre. We note, however, that the VOA has not produced more recent data than 2008.

Table 4.3 Retail Rents in Merton and Other Centres

Centre	**Annual Zone A Retail Rents £ per sq m**							
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**
Oxford Street	5,167	5,221	5,382	5,651	5,705	5,705	5,705	6,082
Bluewater	3,875	4,306	4,413	4,413	4,467	4,467	4,306	4,306
Kingston	2,960	2,960	3,175	3,283	3,337	3,337	2,960	2,960
Kensington	3,444	3,283	3,283	2,960	2,960	2,960	2,691	2,530
Croydon	2,906	2,906	2,906	2,906	2,906	2,906	2,368	2,368
Bromley	2,260	2,368	2,368	2,422	2,476	2,530	2,153	2,045
Richmond	1,884	1,938	2,207	2,153	2,153	2,153	1,938	1,938
Wimbledon	1,346	1,346	1,399	1,399	1,722	1,722	1,399	1,507
Clapham Jct	1,453	1,453	1,453	1,453	1,507	1,507	1,453	1,453
Wandsworth	969	1,023	1,292	1,292	1,292	1,292	1,184	1,184
Putney	1,076	1,076	1,076	1,184	1,184	1,130	915	969
Balham	753	807	861	915	969	969	861	861
Sutton	1,076	1,076	1,076	1,076	1,130	1,130	753	753
Morden	_	_	_	_	_	_	_	480
Colliers Wood	_	_	_	_	_	_	_	350
Mitcham	_	_	_	_	_	_	_	300

Source: Collier Prime In Town Retail Rents2010 and VOA April 2010

4.9 Wimbledon achieves the highest prime Zone A rent in he Borough (£1,507 per sq m - 2010). The retail rent achieved in Wimbledon has risen since 2003, from £1,346 per sq m, although has reduced slightly since 2008 when Zone A retail rents were £1,722 per sq m. In comparison with other competing centres within the wider sub-region, retail rents in Wimbledon are still relatively low. London Oxford Street achieves rents in excess of £6,000 per sq m and nearby Kingston Upon Thames and Croydon achieve rents of £2,960 and £2,368 per sq m respectively. However, Wimbledon achieves rental levels above Sutton. Zone A rents are much lower in the three other main centres in the Borough with prime Zone A less than a third those achieved in Wimbledon town centre.

Analysis of the Main Centres in Merton

4.10 The existing provision of retail floorspace within the designated town, district and local centres and elsewhere in the Borough are shown in Table 1A (convenience goods facilities) and Table 3A (comparison goods facilities) in Appendix 2. Health check appraisals for the designated town, district and local centres are contained in Appendix 3.

4.11 Surveys of visitors have been undertaken in Wimbledon town centre, Morden and Mitcham district centres and in Colliers Wood. A summary of the methodology and results is shown in Appendix 9. This survey has been used to assess customer perceptions of each centre, the centre's current role and scope for improvements.

4.12 A telephone survey of retail businesses has also been undertaken in designated town, district and local centres in order to assess occupier perceptions. A summary of the methodology and results is shown in Appendix 10. The remainder of this section draws out the key findings and implications of the detailed analysis contained in the appendices.

The Mix of Uses and Scale of Designated Centres in Merton

4.13 The comparative size of town, district and local centres in the Borough is shown in Figures 4.2 and 4.3.

4.14 Wimbledon town centre and Colliers Wood (including Priory RP and Tandem Centre) are by far the largest centres in the Borough in terms of floorspace. In terms of shop units Wimbledon has the most extensive choice of shops and services and generally has larger units than the district and local centres, with the exception of Colliers Wood. Colliers Wood has a comparable number of units when compared with district centres, but the average unit size is large, due to the retail warehouses present and Sainsbury/Marks & Spencer. These figures confirm Wimbledon town centre's dominance as the main shopping destination in the Borough.

4.15 The composition of uses within each designated centre is shown in Figures 4.4, 4.5 and 4.6 and compared with the Goad UK average for town centres.

4.16 The mix of uses in Wimbledon town centre is broadly similar to the Goad national average. There are no sectors significantly under-represented. In general, district and local centres have a lower proportion of comparison shops and a higher proportion of convenience and service uses. This reflects these centres' lower order shopping role.

Figure 4.2 Class A1 to A5 Retail Floorspace in Merton's Designated Centres

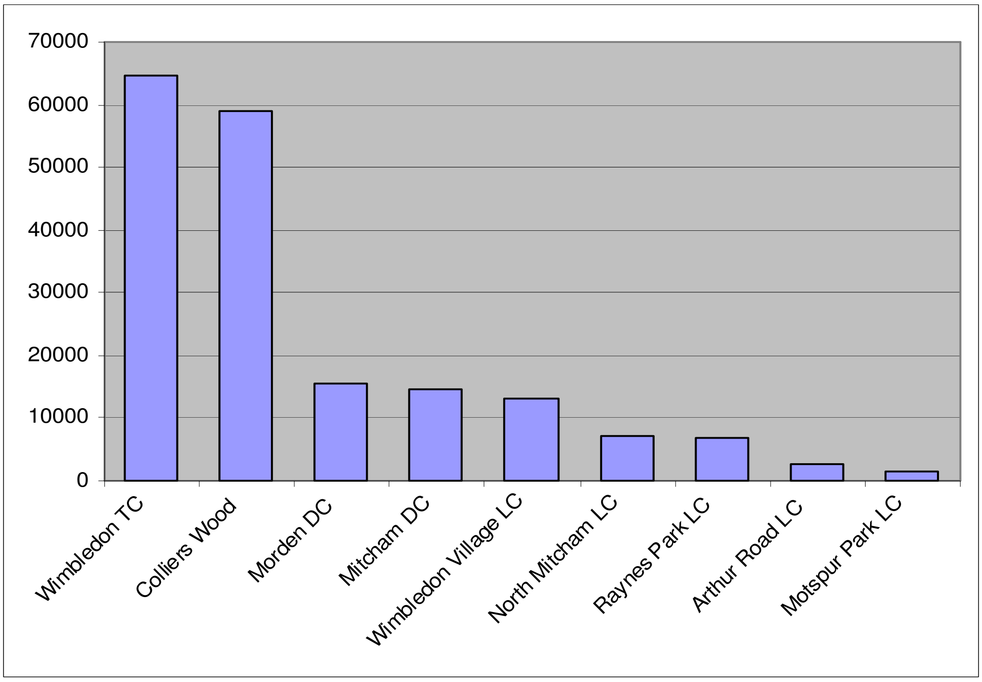


Figure 4.3 Class A1 to A5 Retail Units in Merton's Designated Centres

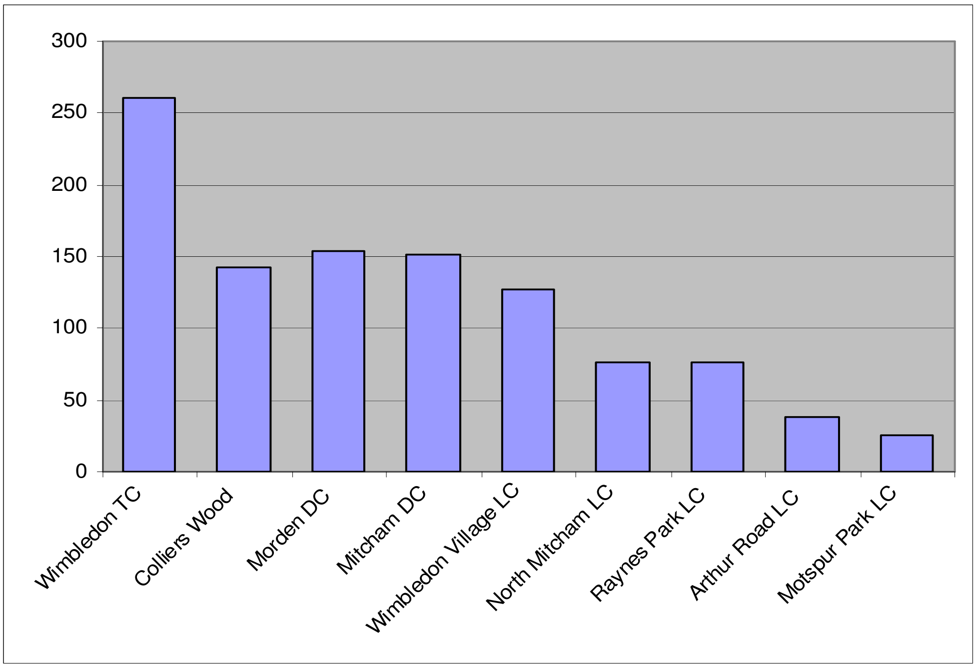


Figure 4.4 Proportional Mix of Shop Units in Merton's Designated Centres (% of All Units)

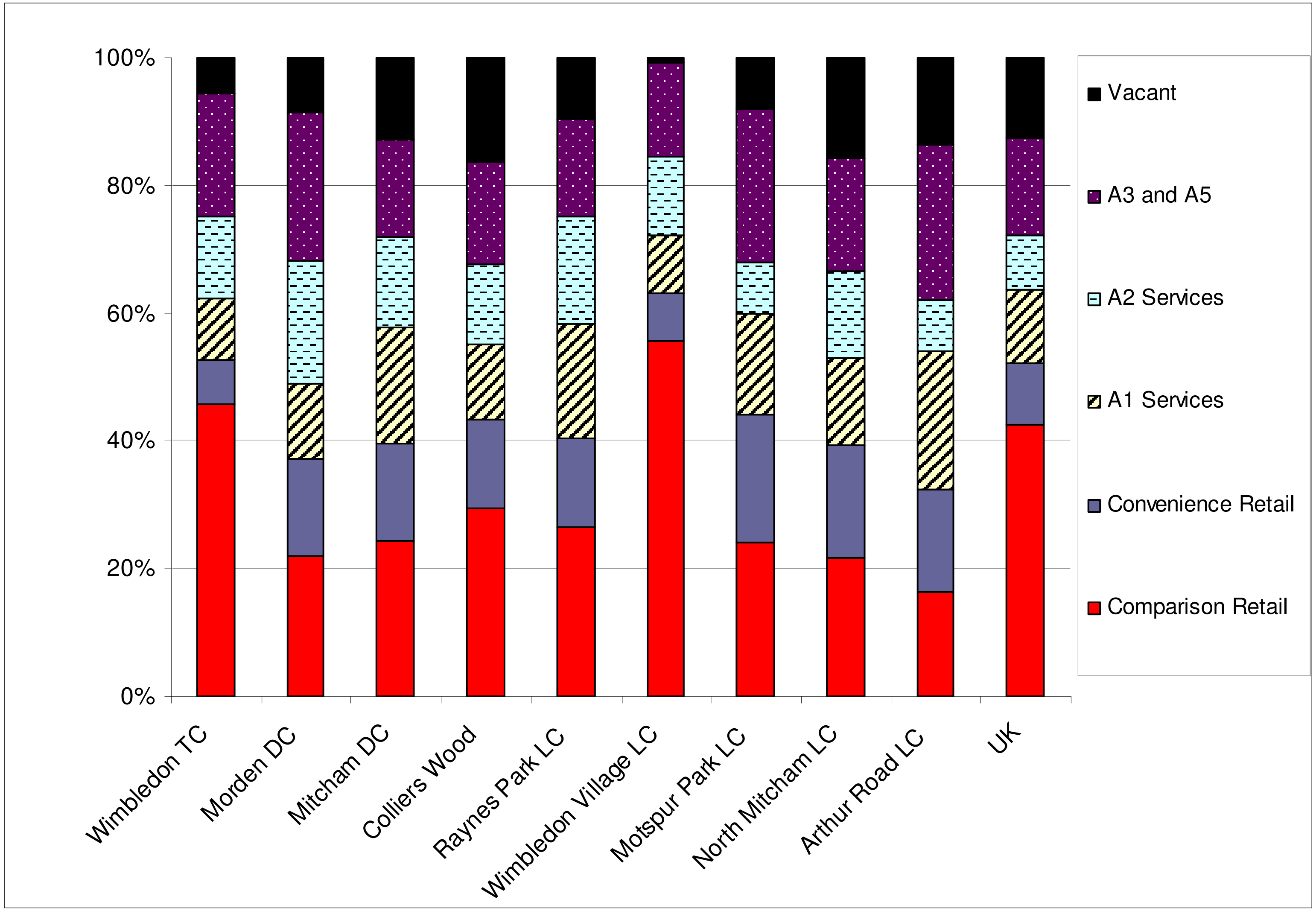


Figure 4.5 Proportional Mix of Comparison Shop Units in Merton's Designated Centres (% of Comparison Uses)

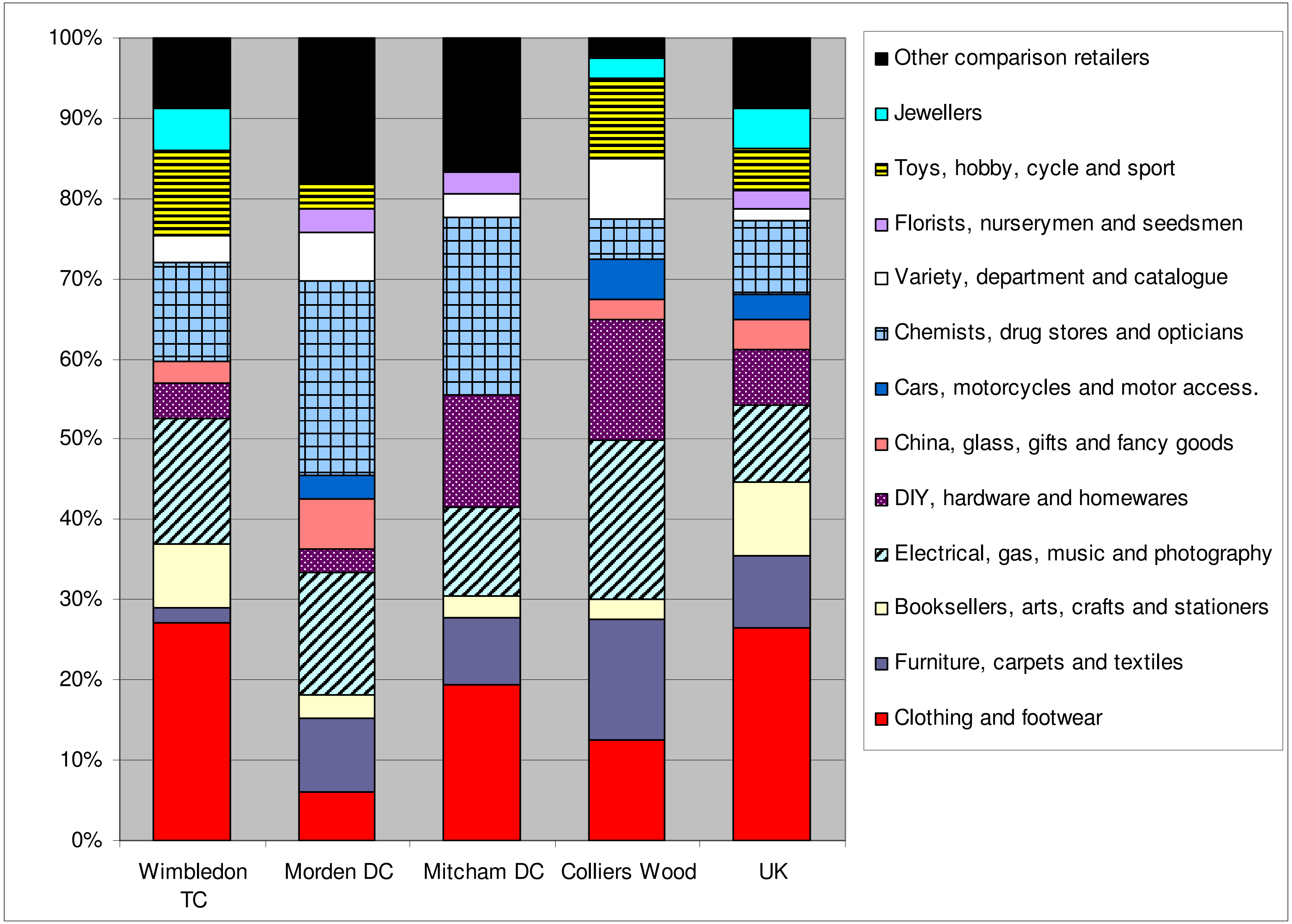
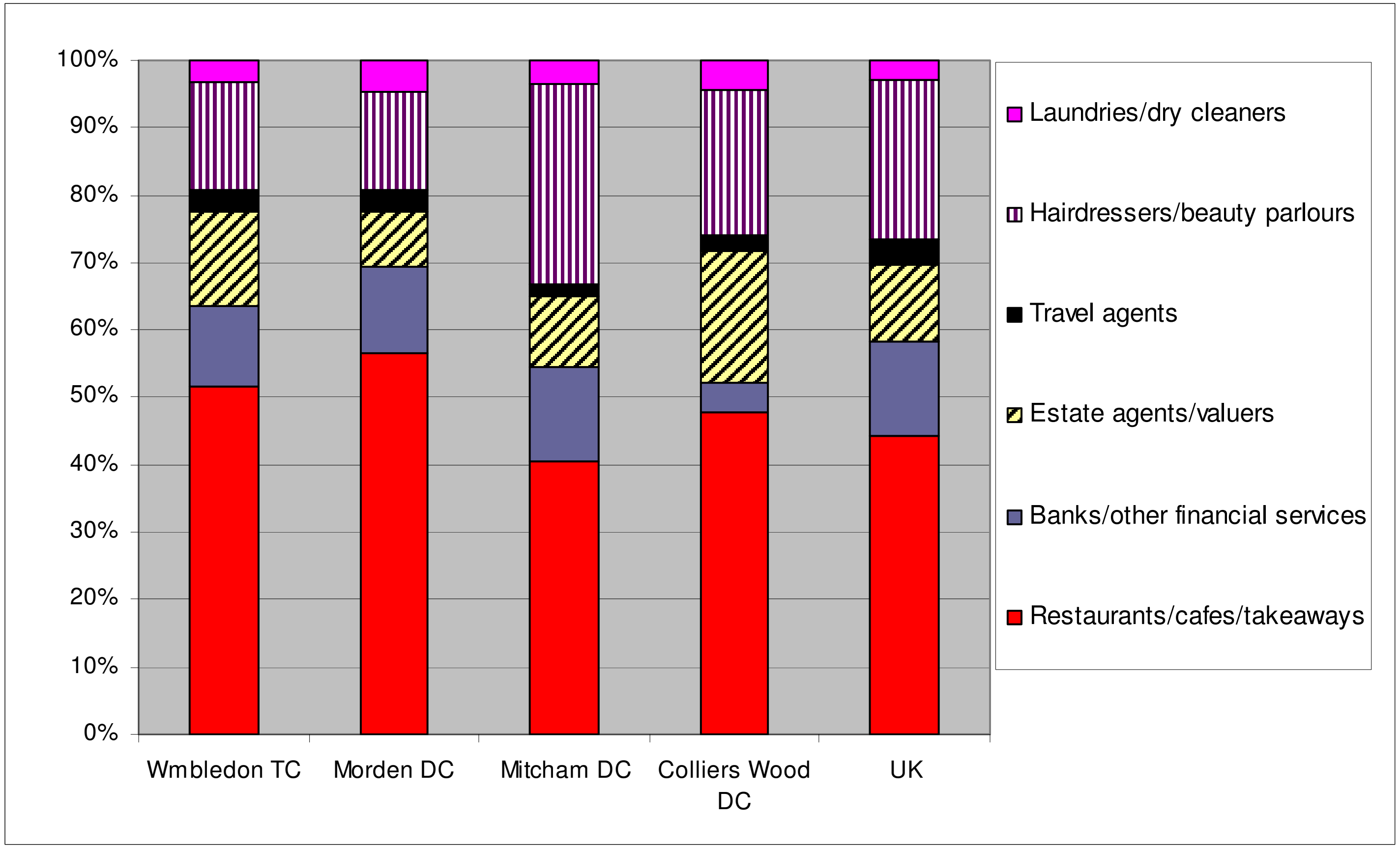


Figure 4.5 Proportional Mix of Selected Service Uses in Merton's Designated Centres (% of Services Uses)



4.17 Wimbledon Village local centre has the highest proportion of comparison shops. It has a niche/specialist shopping role, which complements Wimbledon town centre. Colliers Wood has the next highest proportion of comparison shops, but many of the comparison shops are large retail park stores, and the figures under-represent the importance of comparison shopping in Colliers Wood.

4.18 Vacancy rates are either lower or comparable to the national average in most of the defined centres (excluding Colliers Wood and North Mitcham), which suggests the supply of units is in balance with occupier demand. However there is potential to reduce vacancy levels in some centres. This could be achieved through affordable accommodation and the positive determination of planning applications which encourage the re-use of vacant units.

4.19 In terms of the mix of comparison shops (Figure 4.5) the most goods categories are represented in the four main centres, but Wimbledon is the only centre with a good provision of clothing /footwear shops compared with the national average. Comparison provision in Morden and Mitcham is focused on lower order goods bought on a day to day basis, e.g. pharmaceutical goods.

4.20 All four main centres have a reasonable mix of service uses (Figure 4.6). There is a good provision of Class A3-A5 restaurant/takeaway uses. The provision of banks/building societies in Colliers Wood is an area of deficiency.

Shopping Patterns in Merton

4.21 The household shopper survey results shown in Appendix 8 highlight existing shopping patterns and demonstrate how existing centres and retail facilities in the Borough are currently used. The destination of main food and grocery shopping trips in the study area is summarised in Figure 4.7. The primary destination for non-food (comparison) shopping is shown in Figure 4.8 and Figure 4.9 shows are breakdown of shopping destinations for different categories of comparison goods.

4.22 Large food stores (over 1,000 sq m net) are the primary destinations for main food and grocery shopping trips. Sainsbury at Merton High Street and Tesco Extra near New Malden are the most popular stores in the Borough, which reflects there size compared with other food stores in the Borough. Wimbledon is the dominant non-food comparison shopping centre, followed by Colliers Wood Figure 4.8. These household survey results are consistent with the scale of floorspace in Figure 4.2.

4.23 Wimbledon is the main shopping destination in the Borough for all goods categories, except for electrical goods (Colliers Wood is the main destination) and DIY/gardening goods. The market share of comparison goods shops in Morden, Mitcham, Raynes Park and local centres is relatively low. Croydon, Kingston, Sutton, Wandsworth and the West End are important comparison shopping destinations, particularly for higher order comparison goods such as fashion, furniture and electrical goods where customers are likely to require a good choice of shops to compare products before purchasing.

Figure 4.6 Main Food and Grocery Shopping Trip Destinations (% of Respondents in the Study Area)

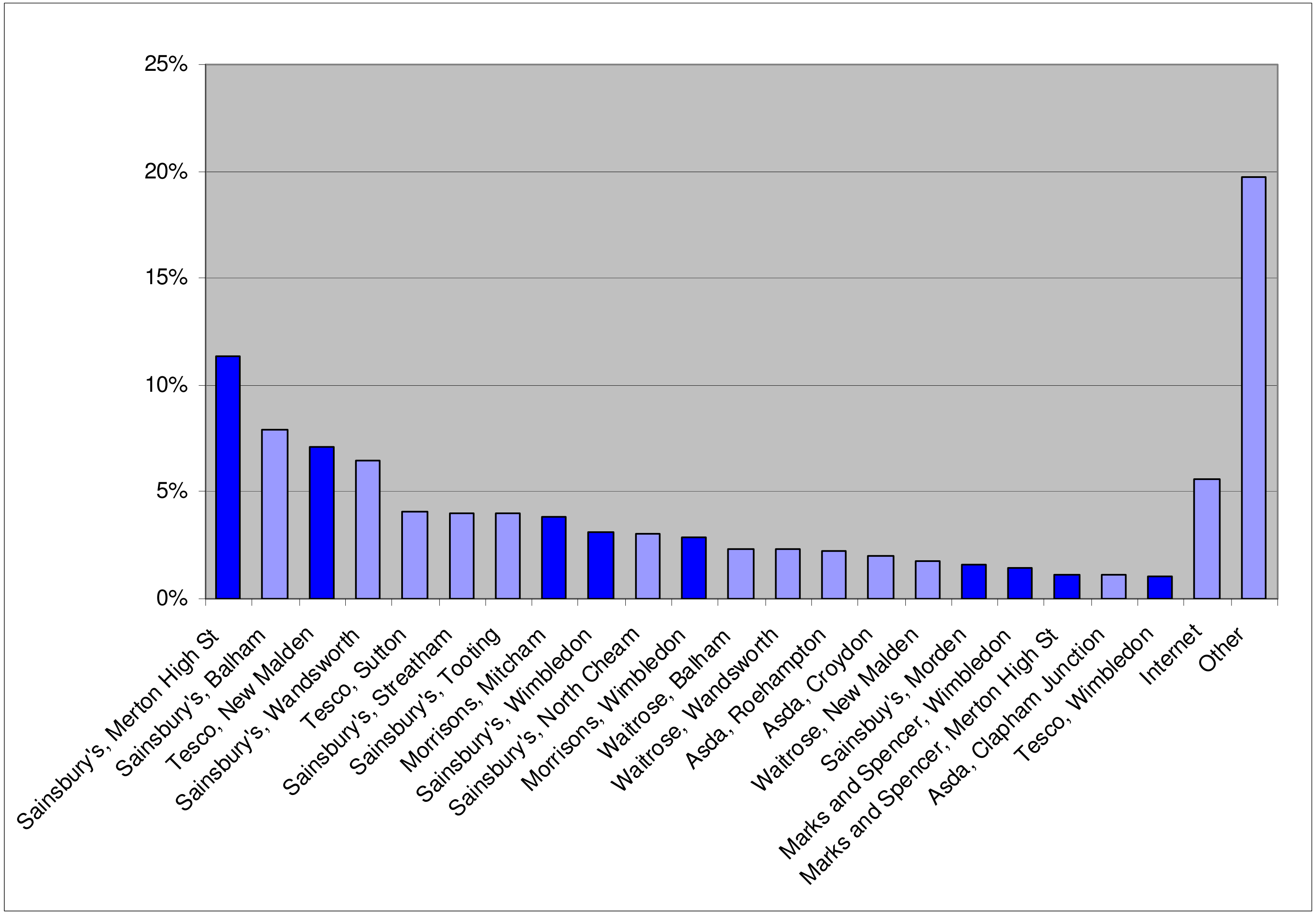


Figure 4.7 Main Non-Food Shopping Destinations (% of Respondents in the Study Area)

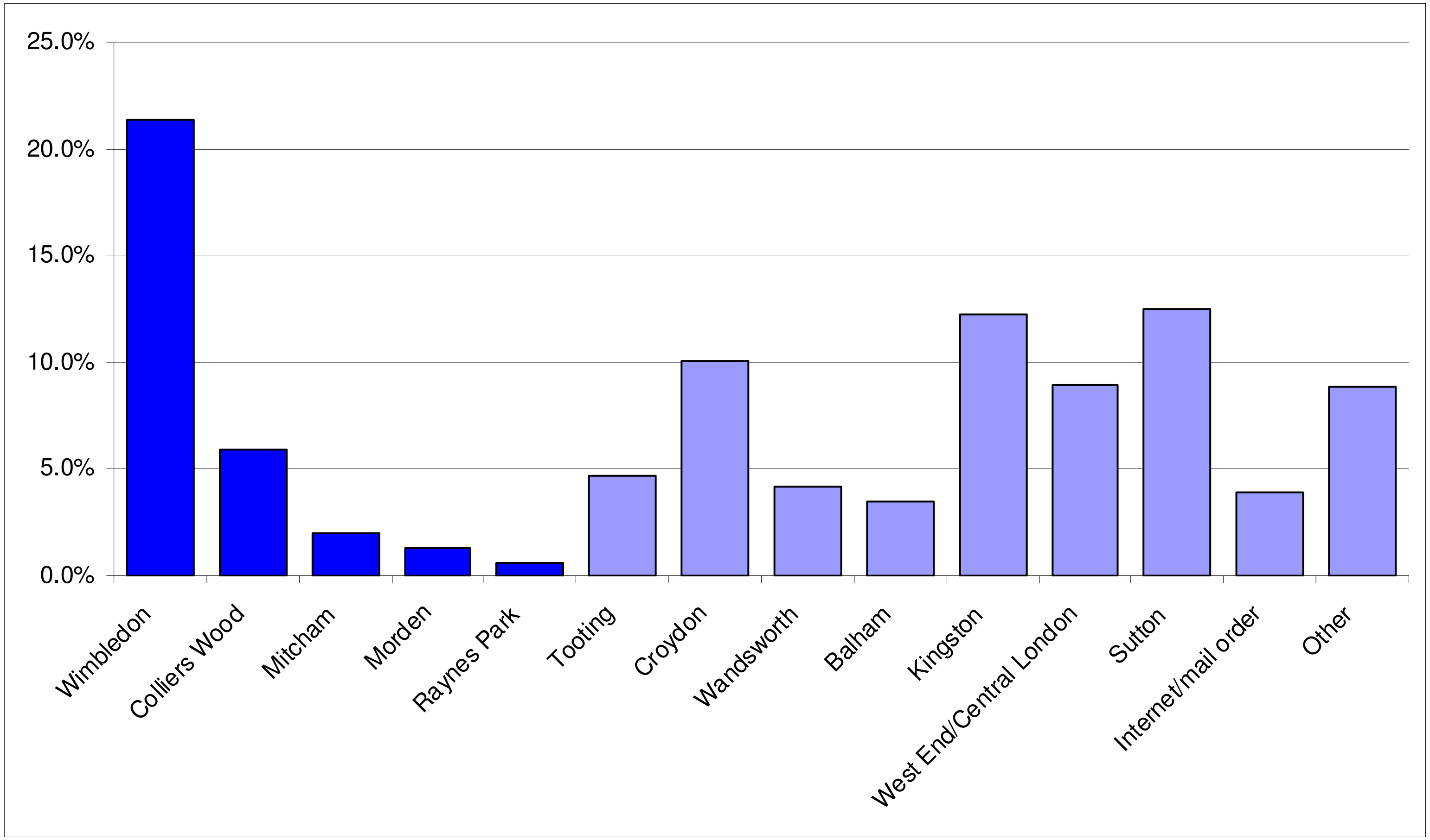
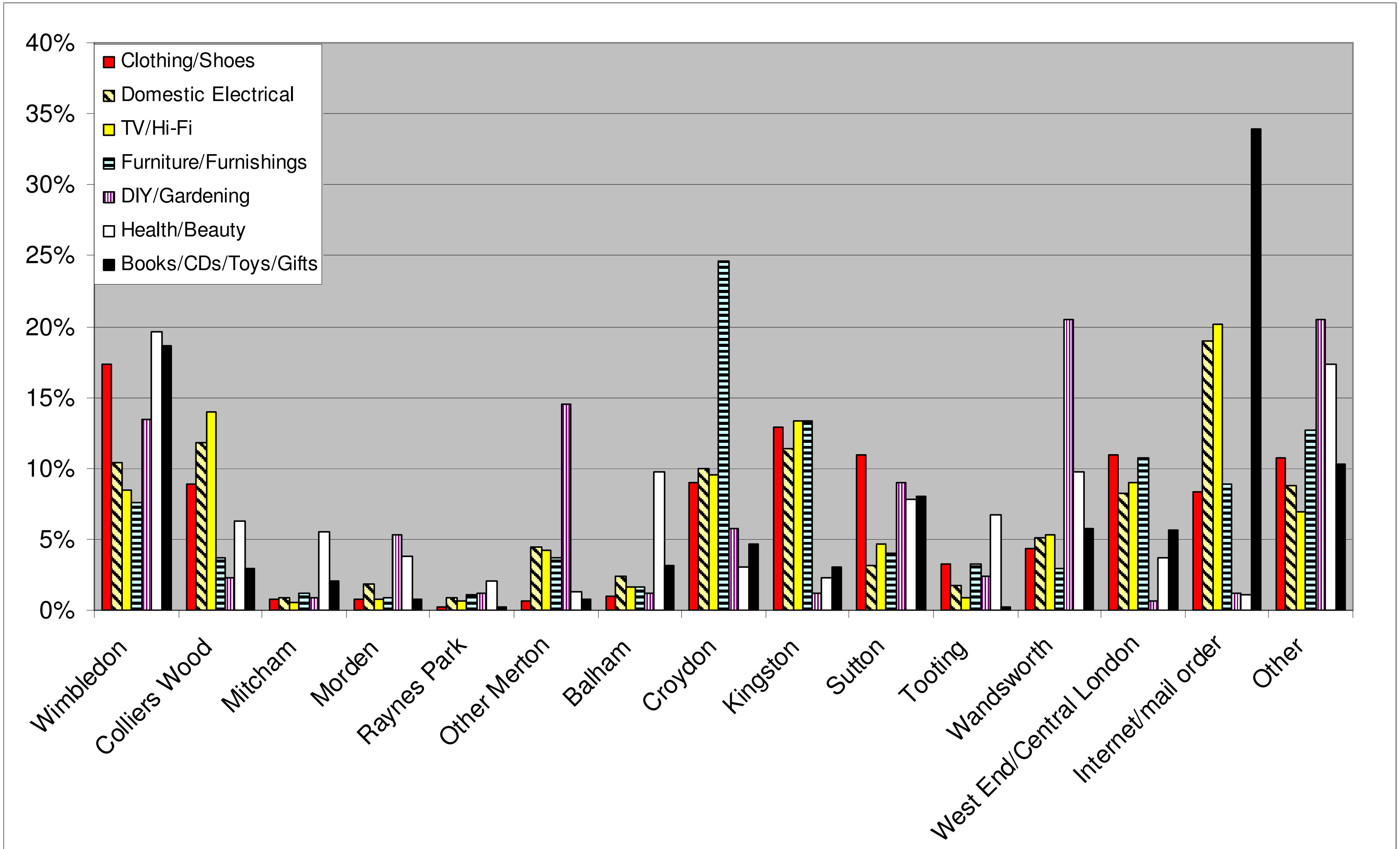


Figure 4.8 Shopping Destinations Used For Each Goods Category (% of Respondents in the Study Area)



4.24 The household shopper survey results indicate that residents within the Borough have a wide choice of shopping destinations both within and outside the Borough. Shopping patterns are complex and the Borough is unlikely to retain all expenditure generated by its residents

Relative Strengths and Weaknesses of Centres in Merton

4.25 The in-street visitor survey results (shown in Appendix 9) and the business occupier survey (shown in Appendix 10) provides valuable information about customer and business perceptions of the four main centres in Merton. Visitors and occupiers were asked to rate the centre from very good to very poor, the result are summarised in Figures 4.9 and 4.10.

4.26 The average scores for most aspects rated by visitors and occupiers range between -1 to 1 (poor to good) which suggests opinions are generally divided. The main exceptions being the public toilets and the market rated as very poor by visitors in Morden. In overall terms visitor perceptions were the poorest in Morden then the other three centres, although Morden scored well in terms of public transport. The results from the business occupier survey were more mixed, with Mitcham performing the worst in overall terms followed by Morden.

4.27 The key areas of most and least concern from a visitor's perspective are summarised below.

Centre	**Aspects of Most Concern**	**Aspects of Least Concern**
Wimbledon	Car parking charges Traffic congestion Public toilets	Personal safety Range of shops Quality of shops Places to eat and drink Shopping environment Food supermarkets
Morden	Public toilets The market Daytime entertainment/leisure Evening entertainment/leisure Town centre events	Bus services Bus facilities (e.g. shelters) Personal safety Food supermarkets
Mitcham	Public toilets Traffic congestion Evening entertainment/leisure Liveliness/street life/character	Bus services Bus facilities (e.g. shelters) Food supermarkets Quality of shops Places to eat and drink Layout of centre
Colliers Wood	Town centre events Public toilets Evening entertainment/leisure Daytime entertainment/leisure	Personal safety Food supermarkets Shopping environment Range of shops Car parking availability

Figure 4.9 Visitor Perceptions (average score where -2 = very poor, -1 = poor, 0 = neural, 1= good and 2= very good)

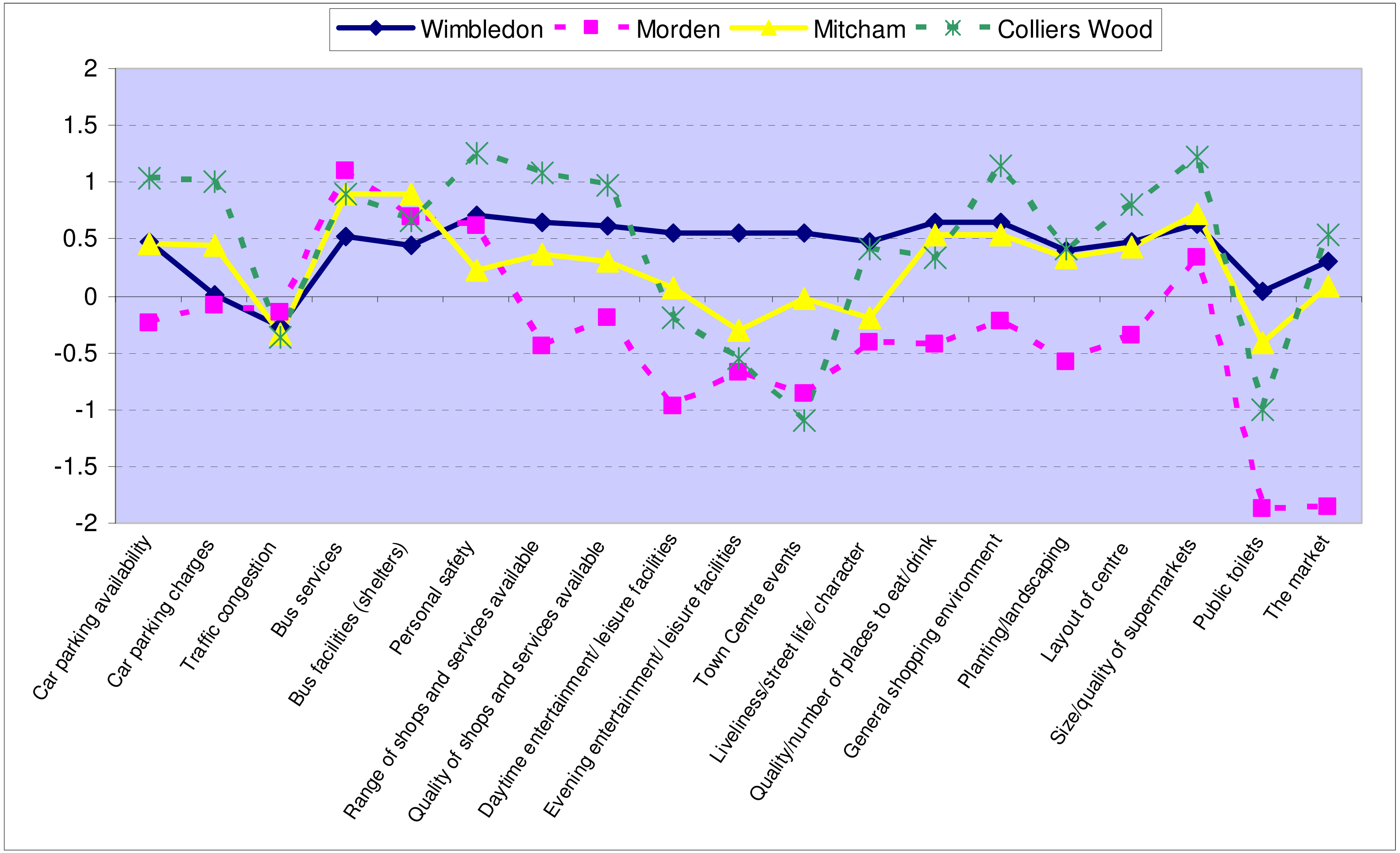
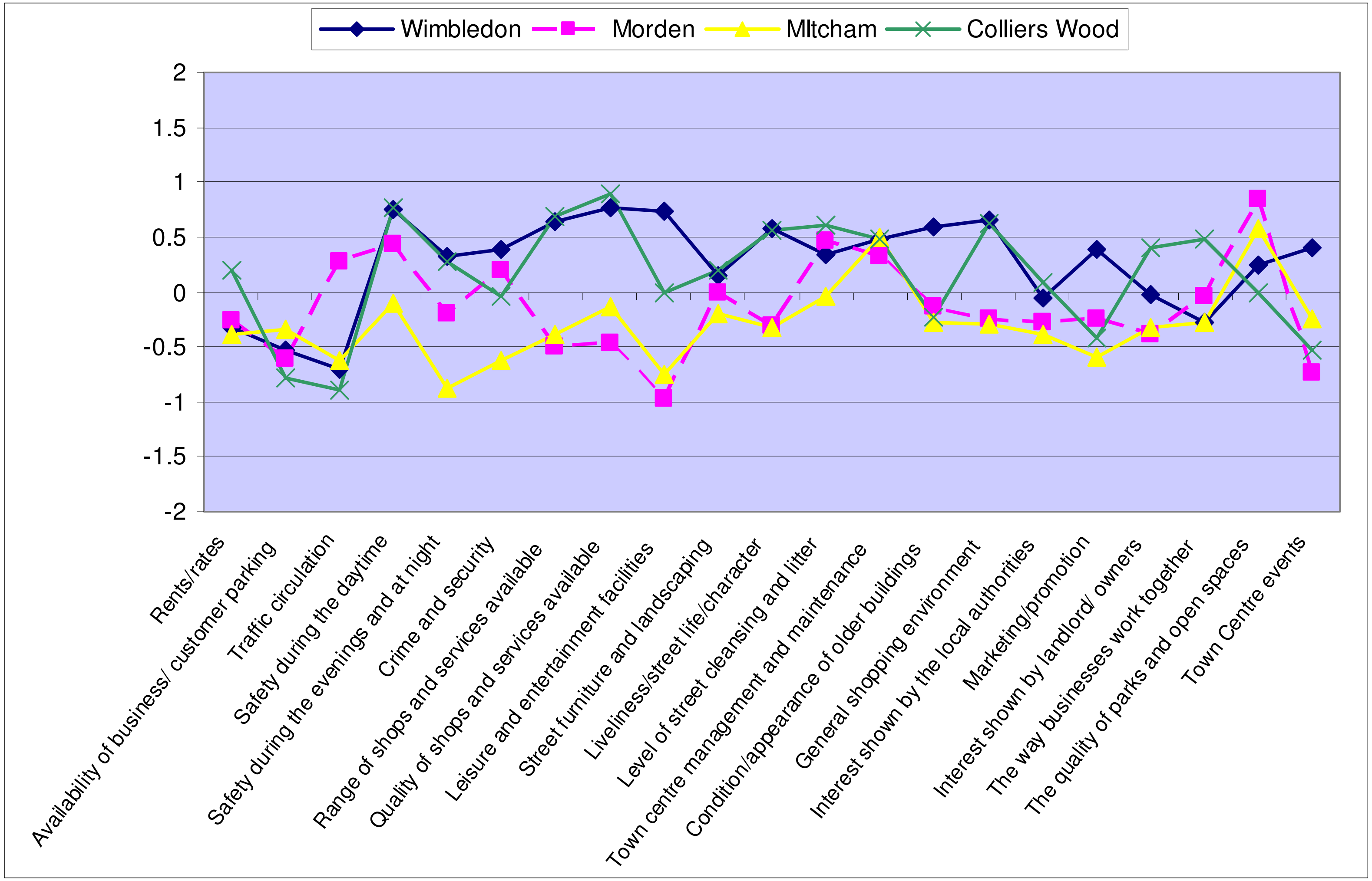


Figure 4.10 Business Occupier Perceptions (average score where -2 = very poor, -1 = poor, 0 = neural, 1= good and 2= very good)



4.28 The key areas of most and least concern from a business occupier's perspective are summarised below.

Centre	Aspects of Most Concern	Aspects of Least Concern
Wimbledon	Traffic circulation Car parking availability Rents/rates Quality of open spaces	Daytime safety Quality of shops and services Leisure and entertainment Range of shops and services Shopping environment
Morden	Leisure and entertainment Town centre events Car parking availability Range of shops and services Quality of shops and services	Quality of open spaces Street cleanliness Daytime safety Centre management/mainten.
Mitcham	Night time safety Leisure and entertainment Crime and security Marketing/ Promotion	Quality of open spaces Centre management/mainten. Street cleanliness Daytime safety
Colliers Wood	Traffic circulation Car parking availability Town centre events Marketing/ Promotion	Quality of shops and services Daytime safety Range of shops and services Shopping environment Street cleanliness

4.29 The in-street visitor and business survey results indicate that improvements to leisure and entertainment facilities are required in Morden, Mitcham and Colliers Wood. The range and quality of shops and services do not appear to be key areas of concern (except amongst occupiers in Morden). However the household survey results indicate that the choice of shops and services is a key determinant of how often respondents shop within specific centres.

4.30 Business occupiers were also asked about their trading performance. Most occupiers across the Borough suggested a decline in trading levels during the previous 12 months, however most expect trade to improve in the future, except in Morden. More businesses in Morden and Mitcham suggested their centres are too down market, whilst occupiers in Wimbledon town centre and Colliers Wood suggested their centre is fine as it is. Wimbledon Village received the highest proportion of responses that the centre was too up market.

Implications for the Study

A - The analysis of the hierarchy, audit of centres and commercial property indicators demonstrate that Wimbledon town centre is the main centre within the Borough, with Colliers Wood, Mitcham and Morden all ranked significantly lower in the retail hierarchy.

B - Wimbledon town centre is the main comparison shopping destination in the Borough, and its position in the hierarchy needs to be maintained if shopping is to be retained in the Borough. Colliers Wood is also an important comparison shopping destination, but primarily due to the large retail parks and Marks & Spencer store, which do not provide an integrated and well contacted centre.

C - Food and grocery provision is more dispersed and the network of town/district/local centres and local parades ensure all residents have good levels of accessibility to these day to day facilities.

D - Most of the Borough’s centres are vital and viable, particularly in the north of the Borough. Morden and Mitcham are the most vulnerable centres, where enhancement and regeneration would be beneficial.

E - Levels of satisfaction amongst businesses and customers are reasonably good but there is scope for improvement within all centres.

F - Commercial property values are highest in Wimbledon town centre and the Village. Elsewhere values are much lower, and it may be more difficult to attract investment and development in these areas. A pro-active approach may be required to attract investment and redevelopment in Morden, Mitcham, Colliers Wood and local centres. Development outside designated centres will need to be controlled in order to maximise the prospects for investment within centres.

5.0 # The Need for New Retail Development

Introduction

5.1 This section assesses the quantitative and qualitative scope for new retail floorspace in the London Borough of Merton in the period from 2010 to 2026. It 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. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre health check work in Appendix 3.

5.2 The quantitative analysis is based on a defined study area that covers the London Borough of Merton together with parts of the adjacent Boroughs of Wandsworth, Lambeth, Kingston upon Thames and Sutton. The study area is sub-divided into nine zones as shown in Figure 5.1. The methodology is summarised in Figure 5.2 and more details of the approach is set out in Appendix 2.

Figure 5.1 Merton Study Area Zones

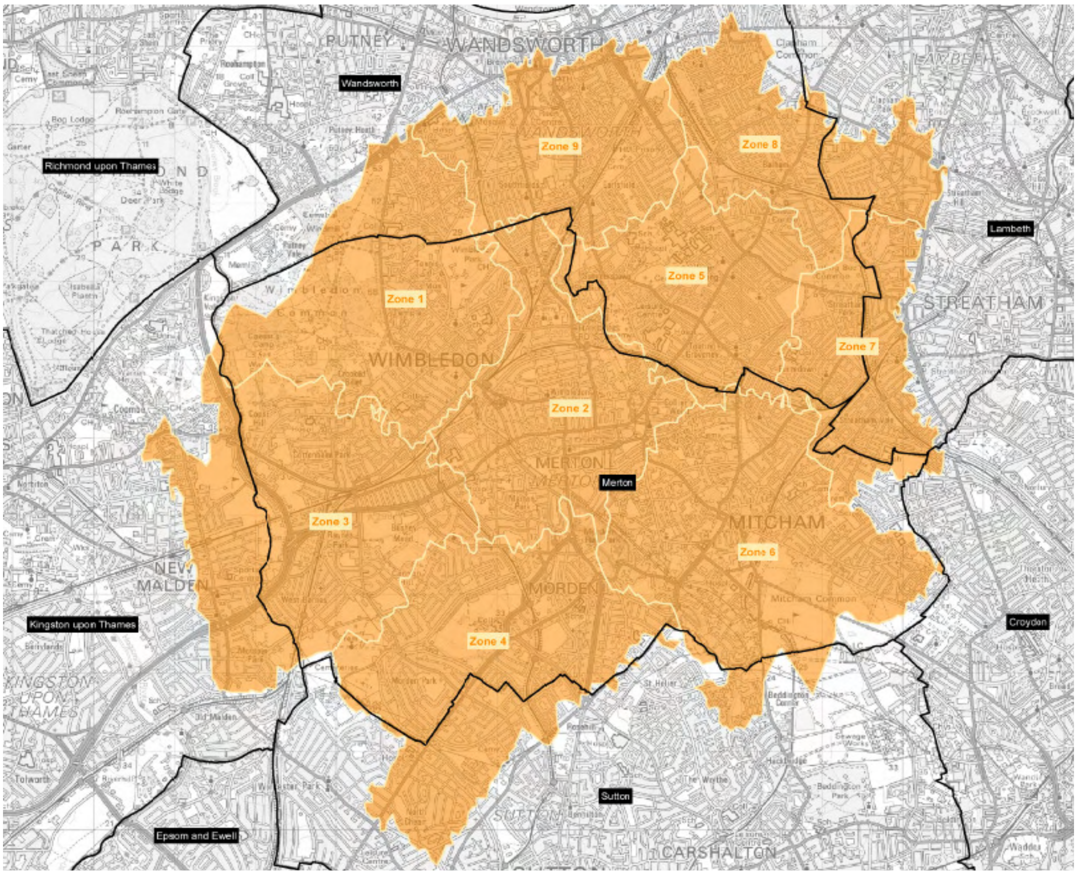
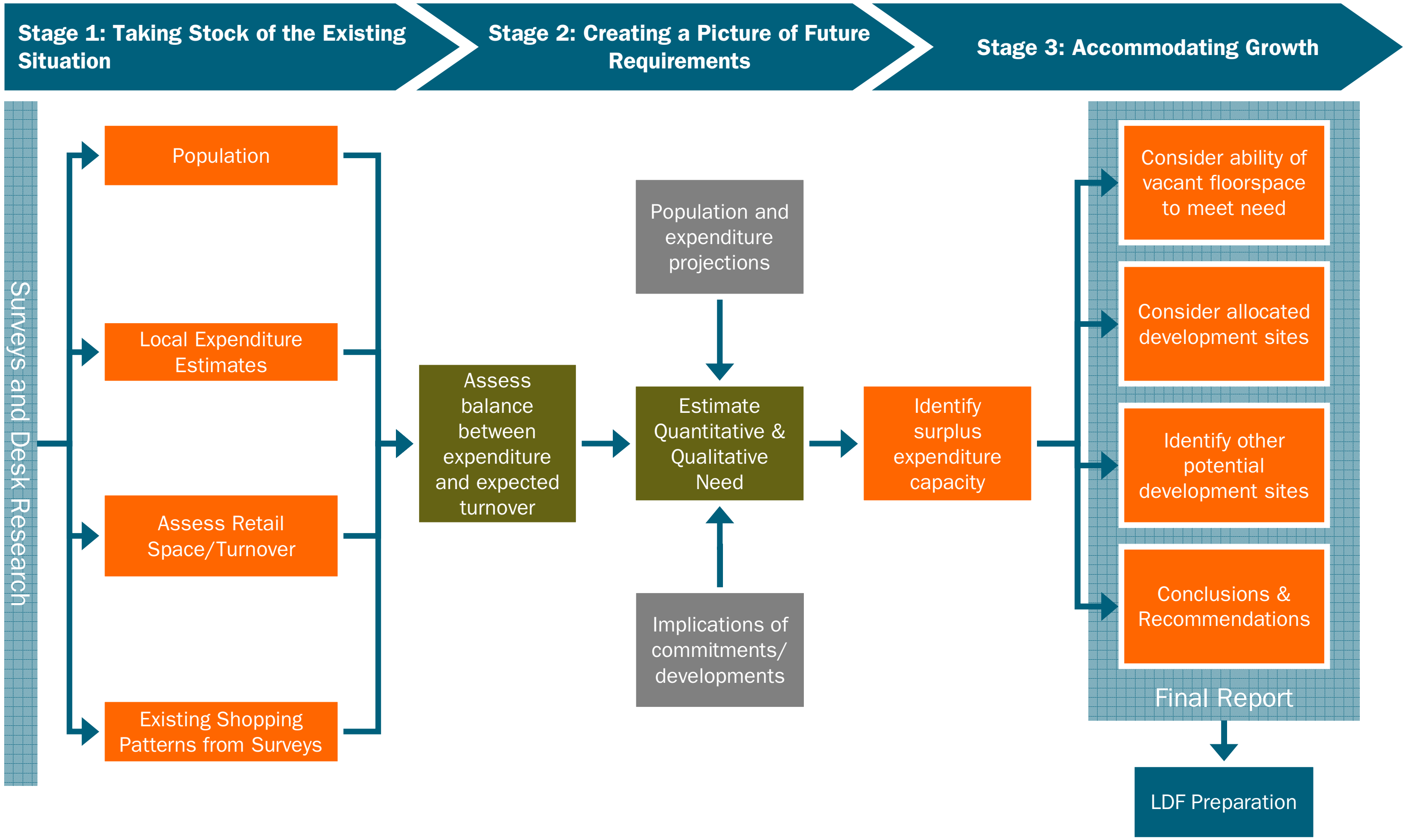


Figure 5.2 Methodology for Estimating Future Requirements for Retail Floorspace



Population and Spending

5.3 The study area population for 2010 to 2026 is set out in Table 1B in Appendix 4. Experian provides population estimates for each of the survey zones at 2001 based on Census data. These have been projected forward between 2001 and 2026 based on GLA Population Projections (2009 Projections Round – Revised August 2010). Population within the study area is expected to increase between 2010 and 2026 by 7.5%.

5.4 Table 2B in Appendix 4 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2026. Comparison forecasts of per capita spending are shown in Table 1C in Appendix 5.

5.5 The levels of available spending are derived by combining the population in Table 1B per capita spending figures in Tables 2B and 1C.

5.6 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 13.7% from £774.06 million in 2010 to £880.17 million in 2026, as shown in Table 3B. Population growth accounts for about 55% of this expenditure growth, and 45% relates to growth in expenditure per capita.

5.7 Comparison goods spending is forecast to nearly double between 2010 and 2026, increasing from £1,189.03 million in 2010 to £2,352.47 million, as shown in Table 2C. Population growth accounts for less than 10% of this expenditure growth, and 90% relates to growth in expenditure per capita. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2010

5.8 Existing convenience goods retail sales floorspace within the London Borough of Merton is 36,799 sq m net as set out in Table 1A, Appendix 2. This floorspace figures excludes comparison sales floorspace within food stores/shops (7,301 sq m net).

5.9 Comparison goods retail floorspace within Merton is estimated as 118,271 sq m net as shown in Table 3A, Appendix 2.

Existing Spending Patterns 2010

5.10 The results of the household shopper questionnaire survey undertaken by NEMS in October/November 2010 have been used to estimate existing shopping patterns within the study area shown in Figure 5.1 above. A summary of the methodology and results is shown in Appendix 8.

Convenience Shopping

5.11 The results of the household shopper survey have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4B, Appendix 4.

5.12 Table 4B indicates that the majority of residents within all zones carry out their convenience retail shopping within the study area (ranging from 95% to 63%). The level of convenience goods expenditure attracted to shops/stores in LB Merton in 2010 is estimated to be £375.04 million as shown in Table 5B, Appendix 4. LB Merton's market share of total convenience expenditure in the study area as a whole is estimated to be about 45% (£346.94 million of £774.06 million).

5.13 The total benchmark turnover of existing convenience sales floorspace within the Borough is £330.67 million at 2010.

5.14 The assessment of shopping patterns, based on the household survey results, suggests that convenience goods expenditure attracted to LB of Merton in 2010 is £375.04 million. These figures suggest that collectively convenience retail facilities in the Borough are trading satisfactorily, 13% above average. The identified available convenience expenditure surplus is £44.36 million. Some of this surplus will be absorbed by Waitrose food store commitments in Wimbledon and Raynes Park.

5.15 Table 5.1 indicates that trading levels amongst convenience goods facilities in the Borough varies from area to area. However, the average sales density figures should be viewed in the context of the type of floorspace and operators located in each area. Convenience floorspace in Wimbledon and Colliers Woods is dominated by large food stores (e.g. Tesco, Sainsbury's, Marks & Spencer and Morrisons stores), which generally trade at a high sales density (over £10,000 per sq m net). Mitcham, Morden and Raynes Park have lower sales densities due to the larger proportion of small shops and discount food stores.

Table 5.1: Average Convenience Sales Densities

Centre	Average Sales Density 2010 £ per sq m net
Wimbledon	£12,197
Mitcham	£6,645
Morden	£7,188
Colliers Wood	£12,893
Raynes Park	£7,570
Tesco Extra New Malden	£13,311
Borough Average	**£10,192**

Comparison Shopping

5.16 The estimated comparison goods expenditure currently attracted by shopping facilities within LB of Merton is £493.85 million in 2010, as shown in Table 3C, Appendix 5. The Borough's market share of total comparison goods expenditure generated within the study area is 33% (£396 million out of £1,189 million).

5.17 Based on this expenditure estimate, the average sales density for existing comparison sales floorspace (115,582 sq m net) is £4,176 per sq m net. The analysis of existing comparison shopping patterns in 2010 suggests the following average sales density figures for the Borough shown in Table 5.2.

Table5.2: Defined Centres Comparison Average Sales Densities

Centre	Average Sales Density 2010 £ per sq m net
Wimbledon	£6,012
Mitcham	£2,406
Morden	£5,742
Colliers Wood (including Tandem and Priory RPs)	£4,161
Raynes Park	£2,561
Shannon Corner retail warehouses	£1,407
Borough Average	**£4,176**

5.18 Table 5.2 indicates that trading levels amongst comparison facilities in the Borough vary significantly from area to area. The average sales density figures should be viewed in the context of the type of floorspace in each area. Comparison facilities in the Wimbledon area are trading at the highest density, which reflects Wimbledon town centre's role as the main comparison shopping destination in the Borough.

5.19 Morden is also trading at a reasonably high sales density, compared with Mitcham, Colliers Wood and Raynes Park. This difference is due primarily the type of retail floorspace in these areas. The Morden figure does not include retail warehouses, whilst the Colliers Wood and Mitcham figures include a significant element of large format/retail warehouse floorspace. Retail warehouses generally trade at a lower density than smaller high street shops. The Morden figure also has a lower proportion of floorspace in local parades, which will also tend to trade at a lower density. The Raynes Park and Mitcham figures have more floorspace in local parades and these parades have predominantly small independent shops, with lower sales densities than national multiples.

5.20 Overall comparison shopping facilities within the Borough appear to be trading satisfactorily, but there is no evidence of over-trading in any part of the Borough.

Quantitative Capacity for Convenience Floorspace

5.21 The level of available convenience goods expenditure in 2013, 2016, 2021 and 2026 is shown at Tables 8B, 9B, 10B and 12B, in Appendix 4. These tables are based on adjusted market shares (Table 6B) which take into account food store commitments. Food store commitments in the Borough are shown in Table 2A in Appendix 2.

5.22 The total level of convenience goods expenditure available for shops in the Borough between 2010 and 2026 is summarised in Table 14B. This table takes into account the population and expenditure projections shown in Table 1B in Appendix 4. 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 14B. Convenience expenditure available to shopping facilities in the Borough is expected to increase from £375.04 million in 2010 to £415.32 million in 2026.

5.23 Table 14B subtracts the benchmark turnover of existing floorspace and proposed commitments from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the Borough, future expenditure growth will generate an expenditure surplus of +£18.04 million in 2013 increasing to +£26.20 million in 2016, +£41.44 million in 2021 and +£56.16 million in 2026.

5.24 The surplus expenditure projections have been converted into potential new floorspace estimates at the foot of Table 14B. Surplus expenditure in converted into floorspace estimates based on an assumed average sales density figure, which is based on the current mix of food stores and small shop in the Borough. The current benchmark average sales density across the Borough is £8,986 per sq m net.

5.25 Based on this assumption surplus expenditure at 2016 could support 2,916 sq m net of sales floorspace (4,486 sq m gross), or 4,612 sq m net by 2021 (7,095 sq m gross), as shown at the foot of Table 14B. The projection to 2026 is 6,253 sq m net (9,620 sq m gross).

Morden Town Centre Expansion

5.26 The More Morden project seeks to revive the town centre including a greater choice of retail provision. There may be potential to redevelop and expand the existing Sainsbury’s food store. This store has a net convenience goods sales area of 1,648 sq m net and there could be potential to increase this by about 1,500 sq m net, which would create a large food superstore. The expected additional benchmark turnover (£18.54 million) of the expanded store is shown in Table 4A in Appendix 2.

5.27 It is unlikely this redevelopment will be completed and trading to full potential before 2016. The implications of this store expansion on trading patterns at 2021 and 2026 been assessed in Tables 11B and 13B in Appendix 4, and revised surplus expenditure projections are shown in Table 15B.

5.28 The revised figures suggest the expanded store could absorb surplus expenditure capacity in Morden at 2021 and expenditure growth between 2021 and 2026. This development would also reduce floorspace projections in other parts of the Borough. The Borough wide projection for 2021 would reduce from 4,612 sq m net to 3,357 sq m net. This reduction (1,255 sq m net) is less than the assumed expansion of the Sainsbury's store (1,500 sq m net) because not all of the increased turnover of the store will be diverted from stores in the Borough, i.e. there will be trade diversion from stores outside the Borough. The revised projection at 2026 is down from 6,253 sq m net to 5,025 sq m net. An expanded store in Morden is unlikely to have an adverse impact on other centres in the Borough, because trade diversion will be offset by expenditure growth.

Quantitative Capacity for Comparison Floorspace

5.29 The household survey suggests that the Borough's retention of comparison expenditure is lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, particularly Croydon, Kingston, Sutton and Wandsworth.

5.30 Future improvements to comparison retail provision within the Borough could help to claw back some additional expenditure leakage from the study area. However major developments in neighbouring authorities, e.g. Battersea Power Station, will limit the ability of shopping facilities in the Borough to increase their market share of expenditure. Indeed retail development will be necessary in LB of Merton in order to maintain existing market share in the future. An appropriate strategy for Merton should be to maintain existing 2010 market share in the face of increasing future competition, whilst maintaining the vitality and viability of centres.

5.31 The retail capacity projections in this report assume Merton Borough can maintain its market share of comparison expenditure in the future. However out-of-centre retail stores at Shannon Corner are close to the Borough boundary and these stores attract a significant proportion of their trade from resident's living outside the study area and the Borough. The retail projections assume that most of the growth attributed to expenditure drawn from beyond the study area will not be accommodated at Shannon Corner or elsewhere in Merton Borough because this would not promote sustainable shopping patterns. This growth should be accommodated in neighbouring Boroughs.

5.32 Available comparison goods expenditure has been projected forward to 2013, 2016, 2021 and 2026 based on 2010 penetration rates (i.e. assuming that comparison retail facilities will maintain their current market share) in Tables 4C, 5C, 6C and 8C in Appendix 5, and summarised in Table 10C. Available comparison expenditure is expected to increase from £493.85 million in 2010 to £1,006.35 million in 2026.

5.33 Future available expenditure is compared with the projected turnover of existing and proposed comparison retail facilities within the Borough in order to provide estimates of surplus expenditure, as shown in Table 10C. Table 10C assumes that the benchmark turnover of comparison floorspace will not increase between 2010 to 2012 due to the recession and limited projected expenditure growth. In the longer term existing floorspace within the Borough is expected to increase its benchmark turnover in real terms. A growth rate of 2% per annum is adopted, which we believe is realistic if an expenditure growth rate of 4.7% per annum is achieved. 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.

5.34 Short term population and expenditure growth will result in available comparison expenditure increasing by £31.33 million by 2013, and continued expenditure growth will create an expenditure surplus of £82.52 million in 2016, increasing to £198.29 million in 2021 and £354.72 million in 2026.

5.35 Surplus comparison expenditure has been converted into net comparison sales floorspace projections in Table 10C in Appendix 5. Surplus expenditure at 2016 could support 15,248 sq m net of sales floorspace (20,331 sq m gross), or 33,184 sq m net (44,245 sq m gross) by 2021. The projection to 2026 is 53,767 sq m net (71,689 sq m gross).

Colliers Wood and Morden Town Centre Expansion

5.36 The implications of the potential enhancement of retail provision in Colliers Wood and Morden town centre has been considered.

5.37 The More Morden project seeks to revive the town centre including a greater choice of retail provision. The provision of an additional 20,000 sq m gross of comparison floorspace (15,000 sq m net) in Colliers Wood has been tested, and an additional 7,500 sq m gross (5,625 sq m net) in Morden town centre has been tested. The expected additional benchmark turnover (£18.54 million) of these development scenarios are shown in Table 4A in Appendix 2.

5.38 The implications of these scenario's on trading patterns at 2021 and 2026 been assessed in Tables 7C and 9C in Appendix 5, and revised surplus expenditure projections are shown in Table 11C.

5.39 The Borough wide comparison floorspace projection for 2021 would reduce from 33,184 sq m net to 17,514 sq m net. This reduction (15,670 sq m net) is less than the assumed combined expansion of Colliers Wood and Morden (20,625 sq m net) because not all of the increased turnover will be diverted from retail facilities in the Borough. The revised projection at 2026 is down from 53,767 sq m net to 39,560 sq m net.

5.40 The levels of additional floorspace tested at 2021 in Colliers Wood and Morden cumulatively are unlikely to have an adverse impact on other centres in the Borough, because trade diversion will be offset by expenditure growth.

Qualitative Need for Retail Floorspace

Food and Grocery Shopping

5.41 The household survey results indicate that most residents in the study area undertake both a *main* and *top-up* shopping trips shopping trip. Main shopping trips are generally made once a week or less often and made more frequently and many households will also undertake bulk food shopping trips, particularly households who have access to a car for shopping. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores, defined as over 2,323 sq m net or more (25,000 sq ft) in PPS4, are the usual destination for these types of shopping trip.

5.42 There are only two food superstores (over 2,323 sq m net) within the Borough of Merton, i.e. Sainsbury at Colliers Wood and Tesco Extra at New Malden, but there are three superstores just outside the Borough but within the study area, i.e. three Sainsbury superstores in Wandsworth, North Cheam and Streatham. A Tesco superstore is proposed in Streatham.

5.43 In addition to these superstores, there are four large supermarkets (over 1,500 sq m net) within town centres in the Borough, i.e. Morrisons and Sainsbury in Wimbledon, Morrisons in Mitcham and Sainsbury in Morden. Elsewhere in the study area there are three other larger supermarkets; Waitrose in Wandsworth, Sainsbury in Tooting and Morrisons in Streatham. There is planning permission for two new Waitrose stores in Wimbledon (former B&Q unit, Alexandra Road) and at Raynes Park. The household survey indicates that these large food stores are the dominant shopping destinations used by residents in the Borough for main/bulk food shopping. All residents within the Borough have reasonably good access to a large food store, and this will improve following the implementation of commitments (i.e. Waitrose at Wimbledon and Raynes Park and Tesco at Streatham).

5.44 These larger food stores are supported by a good range of smaller supermarkets and convenience stores, as shown in Table 1A in Appendix 2. There are 18 supermarkets of between 200 to 1,000 sq m net in the Borough. The discount food sector is well represented with four Lidl stores, in the southern half of the Borough. Food stores within the Borough are supported by a large number of small independent convenience shops located within the main and local centres, including a good selection of ethnic food shops. The analysis of local shopping provision is set out below.

5.45 Food store provision in the Borough and the wider study area is good in terms of the number of stores and spatial distribution. In qualitative terms some of the existing stores do not offer the full range and choice of products available in large superstores, e.g. Sainsbury in Wimbledon, Morrisons in Mitcham and Sainsbury in Morden. Within the four main centres in Merton (Wimbledon, Mitcham, Morden and Colliers Wood) food store provision is weakest in Mitcham and Morden.

5.46 The retail capacity projections set out in Table 14B in Appendix 4 suggest most of the surplus convenience goods expenditure at 2016 relates to food stores in Colliers Wood (£13.59 million) and Wimbledon (£8.88 million). However some of this surplus expenditure capacity can be redirected to Mitcham and Morden. Colliers Wood and Wimbledon attract about £6 million from the Morden area (zone 4) and over £20 million from the Mitcham area (zone 6).

5.47 The priority for future large food store development (over 1,000 sq m net) should be within Mitcham and Morden town centres.

High Street Comparison Shopping

5.48 Wimbledon town centre is the main high street comparison shopping destination in the Borough. The importance of Colliers Wood as a comparison shopping destination has increased significantly in recent years with the development of the Tandem Centre and the occupation of part of the Sainsbury's Savacentre store by Marks & Spencer.

5.49 Wimbledon town centre has a good range of comparison shops including many national multiples and independent specialists. Wimbledon has some high quality fashion retailers such as Kew and Phase Eight. All Saints, Mango, Karen Millen, Radley and Orla Kiely occupy sections in Elys's department store These shopping facilities are complemented by large format stores only two kilometres away at Colliers Wood.

5.50 Wimbledon is positioned reasonably high in the shopping hierarchy in South West London, and is ranked above Richmond, Putney, Clapham Junction, Tooting, Streatham and Wandsworth in terms of multiple retailer representation. However, Wimbledon is ranked below other larger centres in South West London, i.e. Kingston, Croydon and Sutton. These centres are accessible to residents within Merton. Kingston and Croydon have a more extensive of multiple retailers than Wimbledon.

5.51 Wimbledon has two department stores which help to anchor the centre (Debenhams and Elys). However, the provision of department store/large variety stores is superior in Croydon, Kingston and Sutton. Overall, Croydon, Kingston and Sutton town centres are larger than Wimbledon and have a more extensive range of multiple retailers. Residents within Merton have a good choice of high street comparison shopping destinations. Residents in the south of the Borough have good access to Croydon and Sutton, whilst residents across the Borough have good access to Kingston and the West End.

5.52 Wimbledon and Colliers Wood are supported by Mitcham and Morden town centres and local centres within the Borough. These smaller centres have a much more limited range of multiple retailers, but have a selection of specialist independent retailers. Wimbledon and Colliers Wood are likely to remain the main comparison shopping destinations within the Borough.

Bulky Goods Retail Warehouses

5.53 Excluding non-bulky retail warehouse units in Colliers Wood, there are 25 occupied retail warehouses in Merton. The total floorspace of these retail warehouses is over 52,500 sq m gross, about 35% of total comparison floorspace. Retail warehouses are listed in Table 3A, Appendix 2. Retail warehouses in Merton attract customers from across the Borough and beyond.

5.54 The retail warehouses in Merton focus primarily on comparison goods typically sold within retail warehouses, i.e. bulky goods such as DIY, furniture, carpets and electrical goods. The three main DIY operators are all present i.e. B&Q, Homebase (x2) and Wickes (x2). B&Q has rationalised their representation with a new large store (over 10,000 sq m net) at Shannon Corners. There are also two Topps Tiles stores.

5.55 Merton has 5 furniture/soft furnishing stores, including DFS, Harveys (x2), Paul Simon and Dreams Beds. Merton has 3 carpet retail warehouses and 5 electrical stores (including Currys, Carphone Warehouse and PC World). There is also a pet store and two Halfords stores. In addition to retail warehouses selling bulky and traditional retail warehouse goods, there are a number of other unrestricted retail warehouses selling a broad range of comparison goods, concentrated primarily at the Tandem Centre at Collier Wood, e.g. Argos, Boots, Next and JD Sports.

5.56 The existing provision of retail warehouse stores appears to be excellent in the Borough and these facilities also appear to serve neighbouring Boroughs. There is no qualitative need for additional retail warehouse floorspace within Merton in the short to medium term, provided that town centre development can accommodate the floorspace projections set out in Table 10C.

5.57 Any out-of-centre retail warehouse proposals would need to be considered on its individual merits. The applicant would need to clearly demonstrate that the nature of retail floorspace proposed cannot be adequately accommodated within existing centres, allowing scope for disaggregation and flexibility, and that the development would not harm designated centres.

Non-Retail Services

5.58 The retail floorspace projections relate to Class A1 retail uses and exclude Class A2 to A5 uses. Food and drink establishments (Class A3, A4 and A5) are considered in Section 6.0 with other commercial leisure uses.

5.59 National information available from Goad Plans indicates that the proportion of Class A1 non-retail and A2 uses within town centres across the country represent about 20% of all shop units (Experian GOAD, 2010). In Merton Borough nearly 26% of all shop units in town, district and local centres are occupied by Class A1 nonretail services and Class A2 uses, higher than the

Goad national average of 20%. All of the four main town/district centres have an above average proportion of service uses, and there is no identified area of deficiency. Despite the good existing provision, it is appropriate to assume that major developments within centres will include an element of non-retail services). It may be reasonable to assume 10% of new town centre floorspace will be occupied by non-retail services.

Public and Community Facilities

5.60 Community facilities encompass a wide range of facilities, including statutory facilities such as educational establishments, libraries and health facilities. In addition other important facilities include community centres, youth clubs, nurseries, voluntary sector services and meeting places. This study has not attempted to provide a detailed need assessment of for the full range of community facilities, but provides general guidance on the potential need to safeguard opportunities to provide improved community facilities in Merton.

5.61 The Infrastructure Needs Assessment 2008 was prepared by the LB Merton to inform its Local Development Framework. This study assesses the provision of social infrastructure needs over the next 15 years arising from proposed additional housing provision and predicted population growth.

5.62 Most of these community uses are not listed as main town centre uses in PPS4 but are considered to be economic development (paragraphs 4 to 7). PPS4 also indicates centres should have supporting services. Other key community facilities include venues available to groups for loan, hire or rental at a rate lower than a commercial rate, or owned or leased by a group or agency in the statutory or voluntary/charitable sector whether primary uses are not related to commercial activity.

Local Shopping Provision

5.63 The existing provision of local shopping centres within the Borough (local centres and parades) offers a balanced distribution of local facilities serving local communities. These facilities complement the four main centres and have an important role in serving the day-to-day needs in their local areas. The land use survey provided by LB Merton identifies 4 town centres (including one pending designation at Colliers Wood), 5 local centres and 34 neighbourhood parades. In addition to these 43 designated centres/parades. The land use survey identifies 8 other clusters of local shopping facilities, An audit has been carried out of each centre and other clusters of local shopping facilities in the Borough. The audits have been based on the following:

- the size of each centre/ parade in terms of the number of commercial units
- the mix and diversity of retail and service uses
- the role of the centre in relation to different forms of shopping and customer groups; and
- levels of accessibility by public transport.

5.64 The methodology and data is shown in Appendix 1. A summary of local centres within the Borough, including their accessibility by public transport (PTAL) is shown in Appendix 1, including a PTAL map for the Borough.

5.65 The shopping centres, parades and clusters vary in size, from only 2 commercial units (Tamworth Lane, Mitcham) to as large as 261 (Wimbledon town centre), the summary is:

- 28 centres are classified as small;
- 13 centres are classified as medium; and
- 10 centres are classified as large.

5.66 There is a wide range of scores across the centres. These scores are based on the representation of key retail/service provision within the centre. The larger town/district centres have the highest scores (11 or more on the local needs index). All of the designated Local Centres provide at least half of the services identified (a full list of these services is shown in Appendix 2) to fulfil people's day to day needs (a score of 8 or more). Most of the local parades have a score of 5 or less.

The Need for New Local Centres

5.67 The Plan in Appendix 1 shows the areas of the Borough that are beyond 500 and 800 metres of local shopping facilities. These distances have been chosen as reasonable travel/walking distances for customers using local shops and services.

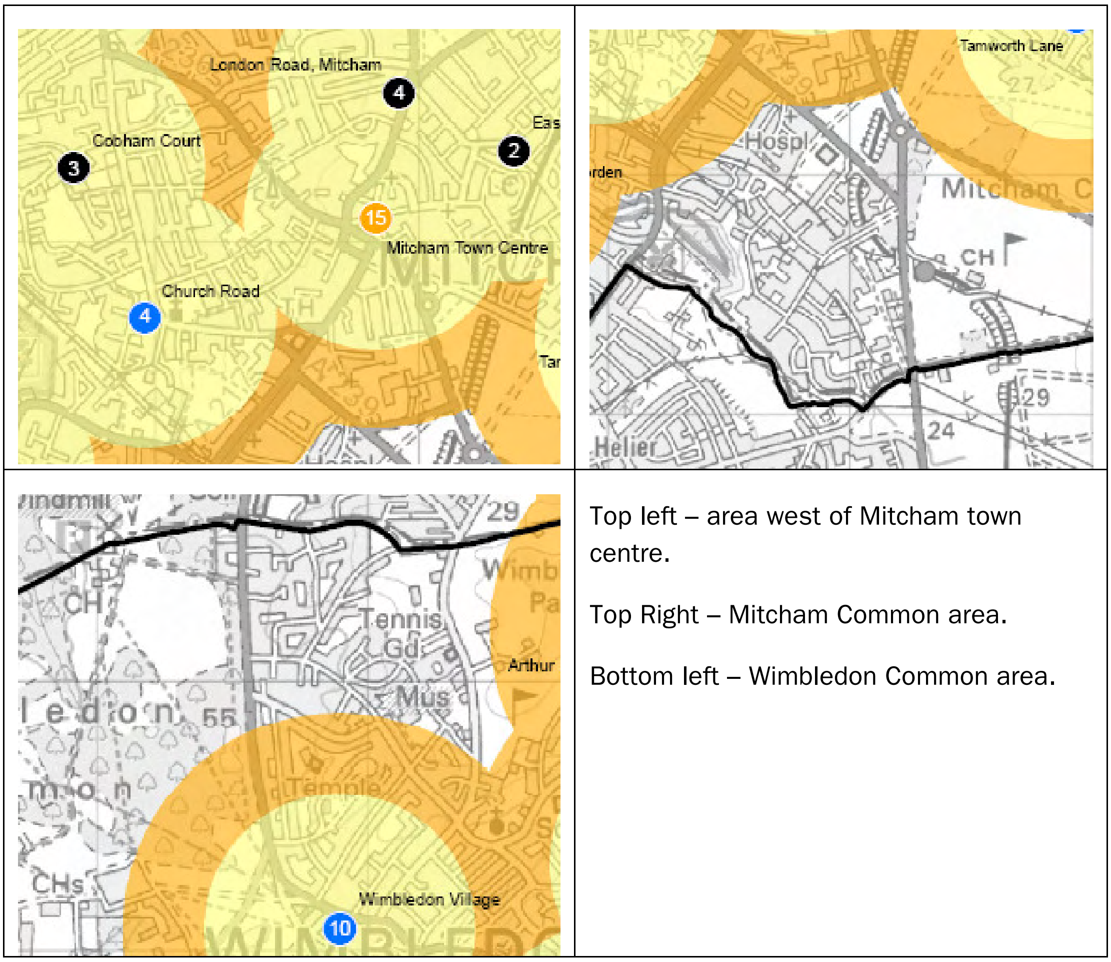
5.68 **Analysis based on 500 metres:** The main built up residential areas which lie beyond 500 metres from a centre seem to be located around the periphery of the borough and towards the centre of the borough, to the north of Morden Town Centre. It may be appropriate to consider whether additional local provision is required in these areas to address areas of deficiency. Provision within mixed use developments could be considered.

5.69 There is an area to the west of Mitcham town centre which has low scores when assessed against the local needs index (see Figure 5.3). This includes Cobham Court and Church Road neighbourhood parades.

5.70 **Analysis based on 800 metres** The residential area to the south east of these centres is over 800 metres from any centre within the LB Merton, although there is a Local Centre (Middleton Centre) within LB Sutton which is approximately 600 metres to the south of the borough boundary. Priority should be given to the provision of additional retail provision focused in this area.

5.71 The Plan also shows other areas of the Borough that is beyond 800 metres of local shopping facilities. The large majority of the built up residential areas are within 800 metres of a defined centre. There are two small areas to the south east and north-west which are not within 800 metres of a defined centre although these form part of Mitcham Common and Wimbledon Common respectively.

Figure 5.3 Areas of Potential Deficiency in Local Facilities



Top left – area west of Mitcham town centre.

Top Right – Mitcham Common area.

Bottom left – Wimbledon Common area.

5.72 An area to the north west of the borough (to the west of Wimbledon common) is located beyond 800 metres to any centre within the borough. However, there is a defined local parade (Inner Park Road) 300 metres to the north of this area within the LB Wandsworth which removes the immediate need for local shopping provision in this area of deficiency.

5.73 From this plan, it would seem that the remainder of the borough is well served, with centres received low score on the local needs index located in close proximity to those receiving higher scores. Apart from the areas detailed in para. 5.68 it is reasonable to conclude that all residents within the borough are well served by existing shopping facilities and services located throughout Merton.

Occupier Demand

5.74 The floorspace capacity projections in this section indicate the theoretical scope for new development based on future expenditure growth. It is also necessary to consider the potential level of demand from operators for new floorspace within Merton.

5.75 NLP's canvas of 300 operators resulting in only 10 responses of which only 2 operators (Wilkinson and Lidl) suggested they had a requirement in Merton, see Appendix 5.

5.76 Current operator demand in Merton is therefore relatively poor and this perhaps reflects the current economic downturn, with many operators postponing their expansion plans. It may also reflect the general polarisation of retail investment within larger shopping centres, e.g. Kingston and Croydon.

Street Markets

5.77 The Retail Markets Alliance's report on UK markets (November 2009) suggests street markets in major cities have outperformed the High Street during the recession, but the performance is mixed. This RMA report suggests successful markets are dynamic and innovative and respond to the changing demands of customers.

5.78 This 2009 research indicates the markets sector has an annual turnover of £7.6 billion generated by 47,000 small to medium businesses, and average of about £160,000 per business. The UK has 1,124 retail markets and 605 farmers' markets.

5.79 The London Assembly published a report on London's street markets in January 2008 and this report was updated in May 2009 in order to reflect the effects of the recession. The reports highlight the importance of markets and their contribution to social, economic and environmental goals, and the expansion of street and farmers markets is supported.

5.80 A qualitative analysis of Merton's four main street markets in set out in Appendix 3. The National Market Traders Federation indicates Merton Borough's four main markets have capacity for about 250 stalls. However the Plough Lane market, Wimbledon only trades on Sundays. In total there are about 500 market stall pitches per week available in the Borough. Assuming each market trader operates five days a week, there appears to be capacity for 100 businesses. Based on the RMA implied average turnover per business (£160,000 per annum) existing market stall provision in the Borough could absorb about £16 million of trade. During NLP's site visits not all of the stall pitches were in use, which suggests the actual amount of trade taken by markets in the Borough is less than £16 million.

5.81 The retail capacity assessment in this section excludes expenditure attributed to street markets (classified as part of non-store retail sales – see methodology in Appendix 1). The retail capacity analysis in this section suggests the retail turnover of existing shops/stores in the Borough is about £870 million in 2010 (convenience and comparison goods combined). If street markets attract an additional £16 million then this implies market stalls in the Borough have a market share of total expenditure of not more than 1.8%. NLP's deductions for non-store sales are 3.2% for convenience goods and 7.5% for comparison goods in 2009, these deductions are expected to increase to 4.8% and 10.4% by 2016. These figures include all non-store retail sales i.e. through internet businesses and other forms of non-store sales such vending machines, deliveries etc. E-tailing is expected to be the main growth sector rather than market stalls.

5.82 At best street markets in Merton could retain their current market share of expenditure. The retail expenditure projections in this report suggest total retail expenditure will increase by 37% in real terms between 2010 and 2021. Based on a maximum existing turnover of £16 million this growth could generate an additional £5.9 million trade for market businesses in the Borough. Given current evidence of low occupancy levels for market stalls in the Borough there appears to be limited scope for the provision of new markets in the Borough and the priority should be to improve existing markets and increase stall occupancy levels.

Implications for the Study

A - In order to meet projected expenditure growth and to maintain the Borough's market share in the future there is a need for additional retail floorspace, about 44,000 sq m gross of comparison goods floorspace and about 7,000 sq m gross of convenience goods floorspace up to 2021.

B - Retail occupier demand is relatively low at present due to the recession and there is no evidence of over-trading in any part of the Borough. However sites will need to be identified within designated centres to accommodate future development if the Borough is to maintain its market share.

C - Wimbledon town centre and Colliers Wood provide the best prospects for attracting comparison goods retailing, but he redistribution of some growth towards Morden and Mitcham would assist the improvement and regeneration of these centres.

D - Retail warehouse provision in the Borough is excellent and expansion of these types of stores is not a priority.

E - The reoccupation of vacant shop floorspace should play an important role in accommodating growth and improving centres. Financial assistance in the form of shop improvement grants or reduced business rates could help to reduce vacancy levels and promote more diversity.

6.0 Commercial Leisure/Other Town Centre Uses

Introduction

6.1 This section assesses the need and potential for commercial leisure development in the London Borough of Merton. It considers the potential for improving a range of major commercial leisure uses including cinema/multiplex, tenpin bowling, bingo, nightclubs, private health and fitness clubs and catering, pubs and bars.

The Potential for Leisure and Entertainment Uses

Catchment Potential

6.2 Based on NLP's experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population, and often benefit from locating together or on large out of centre leisure parks.

6.3 Merton Borough has a large catchment population. There are approximately 424,000 (2010) people within the defined study area for Merton and approximately 214,000 within the Borough. This catchment population has good access to major leisure facilities in Wimbledon, Croydon, Richmond, Kingston and Central London. The proximity of major leisure facilities in these surrounding local authorities may limit the potential for major commercial leisure facilities within Merton.

The Cinema Market

6.4 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. The cinema industry reached a plateau in 2005 following a slight recovery in 2004 with a net gain of 24 operating screens (still a virtual standstill compared to the 100-200 screens added at the turn of the decade). Total admissions in 2009 were 173.5 million, slightly higher than in 2004 (164.6 million).

6.5 Cinemagoing 17 published in April 2008 by Dodona Research reported that 2007 was a fairly flat year for the cinema business in the United Kingdom. Actual figures indicate 2008 was another fairly flat year but figures were up 6% in 2009 (UK Film Council). As the industry is now dominated by three main operators (Odeon, Cineworld and Vue), the emphasis is shifting from consolidation to modest physical expansion. This is the same for their two smaller rivals, The Showcase owned by National Amusements and the Ward

Anderson group of companies which own Empire. Multiplex cinemas now dominate the market with over 70% of available screens in 2007.

6.6 Cinemagoing 17 forecast that total admissions would increase by about 5% between 2007 and 2012, peaking in 2009 at 175 million admissions (compared with the actual of 173.5 million) and then levelling out to 170 million admissions in 2010. Forecasts anticipated a net addition of 136 screens in 2007, 180 in 2008, 70 in 2009 and 50 in 2010. Compared to the last decade these figures represent a considerable slowing of growth, just over 2% compared to past growth of 5.5%. Cinemagoing 17 forecast that by 2012 more than 386 screens will be added to the 3,514 operating in 2007. According to predictions in Cinemagoing 17, British cinema-goers will pay nearly £1.1 billion for cinema tickets in 2011, this is due to a strong upcoming film product, benefits from digital projection and a turn in the investment cycle to new cinemas.

6.7 There are two cinemas within Merton Borough, the Odeon Cinema at The Broadway, Wimbledon (12 screens) and the HMV Curzon Cinema at The Broadway (3 Screens). Major competing centres, including Putney, Kingston, Streatham and Wandsworth have large multiplex facilities as outlined below, which may restrict the catchment area of potential additional cinema provision in Merton:

- Odeon Cinema, Putney High Street (3 screens)
- Cineworld, Wandsworth High Street (14 screens)
- Odeon Cinema, Kingston upon Thames (14 screens)
- Odeon Cinema, Streatham High Road (8 screens)
- Vue Cinema, Fulham Broadway (9 Screens)
- Empire Cinemas, Sutton (6 Screens)
- Odeon Cinema, Hill Street Richmond (7 screens)
- Cineworld Cinema, Fulham Road (6 screens)
- Vue Cinema, Croydon (8 Screens)

6.8 The household survey results indicate that 74% of respondents in the study area visit cinemas, of which 31% indicated that their trip was to Wimbledon.

6.9 To assess the demand for cinema admissions within the study area, we have assumed that Merton Borough could in theory increase its existing share of cinema trips in the study area from only 21% (as suggested by the household survey results) to a maximum of 50% in the future. LB of Merton currently attracts only around 40% of retail expenditure in the study area, therefore the attraction of 50% of cinema trips has been tested to quantify the maximum possible demand for cinema screens in Merton. In reality the Borough is unlikely to achieve a 50% share of cinema trips.

6.10 The catchment population has been converted into a total number of cinema admissions per annum based on the national visitation rate (about 2.8 trips per person in 2009). The national visitation rate (UK Film Council) at 2009 has been used to predict future demand. The total number of cinema admissions has been converted into an optimum number of cinema screens. The results are shown in Table 6.1 below.

Table 6.1 Cinema Potential in Merton

	2010	2016	2021	2026
Catchment Population	423,974	436,879	447,039	455,592
Market Retention	31%	50%	50%	50%
Visits Per Annum	2.8	2.8	2.8	2.8
Visits Per Annum	**368,000**	**612,000**	**626,000**	**638,000**
Optimum Visits Per Screen	75,000	75,000	75,000	75,000
Screen Potential	**4.9**	**8.2**	**8.3**	**8.5**
Existing Screen	**15**	**15**	**15**	**15**

6.11 As indicated earlier, existing provision within Merton is 15 screens. The analysis above suggests that, even based on an increased market share of 50%, there are sufficient cinema facilities in Merton Borough up to 2026. The canvas of leisure operators undertaken during the study identified no demand for cinema development in Merton and Showcase indicated they do not have a requirement in Merton. The potential for further cinema provision within the Borough appears to be limited.

Private Health and Fitness Clubs

6.12 The UK health club market expanded rapidly as public awareness about personal fitness has increased. Business in Sport and Leisure (BISL) 2009 indicates healthy growth across the industry with the Fitness Industry Report stating that by March 2008, there were 5,755 combined public and private sector fitness sites across the UK. Since 2007, 41 new facilities had opened. The total number of UK health and fitness members at public gyms and private health clubs is now over 7 million.

6.13 About 12% of the population are now members of a private health club or registered users of a leisure centre gym in the UK, compared with just 8.9% in 2002 and this growth looks set to continue. The household survey results suggest that 35% of households in the study area visit health and fitness clubs, which is higher than the national membership rate. It should be noted that not all members of these participating households will be members of health clubs (e.g. children) therefore the membership rate is likely to be less than 35%.

6.14 Private health clubs in the UK range from small independent clubs to large operators such as Nuffield Health, David Lloyd, Esporta, Fitness First, Virgin Active, Bannatyne and LA Fitness.

6.15 Private health clubs had 4.2 million members in 2007 (1,375 members per club). The largest health clubs can have memberships of approximately 4,000 people. Independent clubs remain a strong presence in the private sector market running 55% of all private clubs. Of the 126 new private health clubs that have opened since January 2006, 58% were independent clubs and 42% were owned by multiple operators. Public sector sports centres are also important, and the market increased significantly between January 2006 and March 2007, with 106 new facilities opened and in terms of like-for-like membership growth rates, the sector saw an impressive 4.6% growth.

6.16 There are a number of private health and fitness clubs in Merton Borough as follows:

- David Lloyd, Raynes Park
- Wimbledon Racquets & Fitness Club, Wimbledon
- Virgin Active Gym, Bushey Road, Colliers Wood
- Nuffield Heath Club, Wimbledon
- Esporta, Wimbledon
- KCS Enterprises Ltd, Wimbledon
- Christopher's Squash and Fitness, Wimbledon Stadium
- AELTC Millennium Building Competitors gym (for competitors generally and members of staff or members of the AELTC)
- FitSpace, Upper Green East Mitcham
- Virgin Active, Watermill Way0
- Wimbledon Club, Church Road, Wimbledon
- Wimbledon High School, Mansel Road, Wimbledon
- Squats Gymnasium, Mitcham Lane.

6.17 In addition to the private leisure/entertainment facilities there are several local authority owned sports centres. The Canons Leisure Centre in Mitcham provides a swimming pool, sports hall, squash courts, wellness fitness zone and dance studio. Wimbledon Leisure Centre is situated on Latimer Road in Wimbledon, it provides a 30-metre pool, Wellness fitness centre and dance studio. Morden Park Pool on London Road has a Competition pool, toddler pool as well as a fitness suite. The YMCA on The Broadway also provides a range of leisure facilities including circuit training, keep fit, five-a-side football and yoga.

6.18 In total Merton has at least 13 public and private clubs. The household survey indicates that 35% of respondents or their families visit a health/fitness club. Of these, 43% did so at destinations within the main towns in the Borough.

6.19 The Borough's adult population (approximately 170,000), could generate demand for about 20,000 public/private membership places, based on the national average membership rate (12%). This implies an average of 1,500 members per club in the Borough, which is slightly higher than the national average for private fitness clubs (1,375 members). This suggests there could be scope for additional provision of health and fitness clubs in the Borough.

6.20 A future increase in membership rates and/or population growth could generate additional demand. Population growth in the study area up to 2016 (+10,000 adults) could generate demand for a further 1,200 places, and growth up to 2026 could support 3,000 places. There could be scope for additional health club facilities in the future due to growth in population and participation rates.

Tenpin Bowling

6.21 Tenpin bowling grew quickly in the UK in the 1960s. However, the complex scoring system, lack of investment and deterioration exacerbated a significant decline in the 1970s. A resurgence of interest in tenpin bowling during the late 1980s and computer scoring led to a second boom. The tenpin bowling sector experienced steady growth, 13% real growth between 1997 and 2002. Mintel predicted the value of the tenpin bowling market would increase from £245 million in 2002 to £324 million by 2007.

6.22 There were 269 tenpin bowling centres (5,005 lanes) in the UK in 2007, approximately one lane per 12,000 people. Bowling centres now tend to be part of major leisure developments that include multiplex cinemas, restaurants and nightclubs offering a choice of leisure and entertainment activities.

6.23 Tenpin bowling centres require large buildings of between 2,300 to 4,200 sq m (25,000 to 45,000 sq ft) and are generally located in towns with a population of over 150,000 people.

6.24 There is only one bowling alley within Merton Borough which is David Lloyd Lanes at Raynes Park, with 20 lanes. Within other towns there is: Funland at Piccadilly in Central London, Charrington Bowl - Surbiton, Tenpin at Kingston upon Thames and Croydon.

6.25 The household survey results suggest that about 25% of households in the study area visit tenpin bowling facilities, and of those who visit bowling facilities mainly go to Raynes Park (6% of respondents) followed by Croydon (3% of respondents). The study area population as a whole could theoretically support 35 lanes, based on one lane per 12,000 people, or 38 lanes in 2026.

6.26 Based on the existing provision of tenpin bowling facilities within and adjacent to Merton, there appears to be limited potential for further tenpin bowling facilities within the Borough.

Bingo

6.27 The bingo market peaked in the mid-1970s, with almost 2,000 clubs nationwide. Since then the sector has struggled to compete with other leisure activities, including the impact of the National Lottery. The decline has bottomed out and attendance figures have remained steady since the late 1990s, and revenues and profits have started to increase.

6.28 The UK had 676 commercial bingo clubs in 2005, but in March 2008 this had decreased to 616 commercial bingo clubs, approximately one club per 100,000 people. The amount staked on bingo had continued to rise in previous years but peaked in 2006 at £1,826 million and fell to £1,620 million in 2008.

6.29 Bingo clubs attracted 79 million admissions in 2005 (source: Mintel), about 1.75 admissions per adult each year. On average each club attracted 117,000 admissions in 2005 (about 2,250 admissions per week). The average participation rate (adults) was 6.9% in 2004 (source: Mintel), split 2.8% regular players and 4.1% occasional players. Mintel forecasted that admissions would decline from 79 million in 2005 to 68 million in 2010, although the average spend per head was expected to increase from £26.90 to £38.40.

6.30 Mecca and Gala are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas), into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups.

6.31 The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators, such as Mecca and Gala, require buildings of between 2,000 to 3,000 sq m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 people within freestanding towns (source: BISL). Based on national average figures the Merton study area could support four bingo facilities.

6.32 The household survey results indicated that only 6% of households in the study area visit bingo facilities, of which 23% visited Tooting, and 13% visited Streatham. The study area has two bingo clubs, Gala in Tooting and Mecca in Wandsworth. There are also facilities in Sutton and Croydon which serve the study area. The existing bingo provision within and around the study area suggest there is limited need for additional facilities.

Nightclubs

6.33 The value of the nightclub market (permanent venue offering dancing in return for an admission fee) declined from £2.16 billion in 1998 to £1.77 billion in 2002 (source: Mintel - Nightclubs). There are approximately 1,750 nightclubs in the UK, approximately one per 30,000 people.

6.34 The sector has faced increasing competition from late night pubs and bars, with no admission fees. The BISL envisages a continued period of rationalisation and price competition, but the forecast trend of significant growth in the 18-24 year old age group is expected to provide a growing market.

6.35 Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. There are three nightclubs/late bars in Wimbledon.

6.36 The household survey results indicated that only 12% of households in the study area visit nightclubs of which 30% of these households last visited Central London, followed by Wimbledon (9)%, Sutton (9)%, Clapham (8%) and Kingston (8%). The provision of nightclubs in Central London, Kingston and Croydon will limit the potential for major new nightclubs in the Borough but small-medium nightclub facilities may be viable. However, LB Merton's Licensing Policy imposes a cumulative impact area along the whole length of the Broadway in Wimbledon that would effectively prevent any further nightclubs being given a licence.

Casinos

6.37 In February 2008 an order was laid before Parliament to allow 16 local authorities to license casinos, but the Government stated that regional casino licences would not be allowed at this stage.

6.38 Operators now have to think in more detail about the catchment area of their casinos and the level of existing or future competition in a given area. Key catchment areas will have to be in or within the near vicinity of a large centre, such as a major town or city, with a drive time catchment area of approximately 30-40 minutes and as close to the centre of the catchment area as possible, with good transport links. The proximity of other established commercial uses will also be a key factor for operators when looking at locations for casinos.

6.39 There were 144 licensed casinos operating in Great Britain at March 2008, about one casino per 400,000 people. Attendance at casinos by members and guests increased by 6.6% from the previous year to over 16 million trips.

6.40 There are no casinos within the study area. The provision of casinos in Central London will limit potential in the Borough. No specific catchment area population has been identified by casino operators. However, Wimbledon town centre may have a catchment population large enough to support a small casino, but larger centres such as Kingston and Croydon and Central London are likely to be more attractive locations. Our canvas of retail and leisure operators included several major casino operators and no requirement for a casino in the Merton area was identified. Furthermore, LB Merton has resolved not to issue any new casino licences in the Borough.[1]

Bars and Restaurants

6.41 Food and drink establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks. Within town centres the demand for A3/A4/A5 uses has increased

[1] Council resolution under Section 166 of the Gambling Act, and not to allow operators to make applications for premises licenses for casinos.

including a significant expansion in the number of coffees shops, such as Starbucks, Costa Coffee and Coffee Republic.

6.42 National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Many chains such as All Bar One, JD Wetherspoon and Yates Wine Bars have sought representation in smaller centres close to residential communities.

6.43 National information available from Goad Plans indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 6.2. The proportion of Class A1 retail uses in Goad town centres has decreased by 12% between 1994 to 2008 (7.2 percentage points), whilst Class A3/A5 uses have increased.

Table 6.2 GB Goad Plan Town Centres Use Class Mix

Type of Unit	% Change 1994 to 2010	Proportion of Total Number of Units (%)			
		1994	2000	2005	2010
Class A1 (Retail)	-17.5	61.2	59.1	56.4	52.1
Class A1 (Services)	+4.1	6.9	8.2	9.6	11.6
Class A2	+0.01	8.5	8.9	8.9	8.6
Class A3/A5*	+39.5	9.2	11.2	13.7	15.2
Miscellaneous	-	1.0	1.4	1.4	
Vacant/under Const.	-0.1	13.2	11.2	10.1	12.5
Total	**-**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Goad Centre Reports *excludes Bars/Public houses (A4)

6.44 The number of bars and pubs has continued to decline in recent years according to figures produced by the Department of Culture, Media and Sport. The Beer Orders were acts passed by the government in the early 1990s which saw a massive expansion of themed bar operators and pub restaurants, such as JD Wetherspoon. These outlets generally require a minimum 50,000 population and are usually located on main streets or secondary positions close to prime retail, commercial and other leisure users. Operators usually require large premises of 250 - 1,500 sq m, in close proximity to public car parks and good transport links.

6.45 Themed restaurants also expanded rapidly in the 1990s. These operators have located in out of centre retail/leisure parks as well as good secondary/primary high street locations. Fast food operators such as McDonalds and Burger King have expanded the number of drive through outlets, and town centre outlets. Outlets have been developed within retail/leisure parks or on busy roads. Outlets require sites of approximately 0.2 hectares.

6.46 Growth in Class A3 to A5 uses within town centres may continue in the future, and will compete for shop premises with other town centre uses. A balance between Class A1 and Class A3 to A5 uses needs to be maintained. This could be achieved by ensuring major developments include an appropriate mix of uses (Class A1-A5). Also, shop frontage policies could be implemented to monitor the change of use of existing Class A1 retail units.

6.47 Over 18% of all shop units in Merton's town, district and local centres are occupied by Class A3 and A5 uses, slightly higher than the Goad national average of 15.2%. All of the four main town/district centres have an above average proportion of Class A3/A5 uses, and there is no identified area of deficiency. Despite the good existing provision, it is appropriate to assume that major developments within centres will include an element of Class A3 to A5). It may be reasonable to assume 10% of new town centre floorspace will be occupied by Class A3 to A5 uses.

Theatres

6.48 The household survey indicated that 76% of respondents in the study area visit theatres. The most popular destination was the West End with 30% of respondents, closely followed by Wimbledon with 24% of respondents. There are four theatres within the study area i.e. The New Wimbledon Theatre and the Polka Children's Theatre in Wimbledon, Collyer Hall Theatre, Southside Common and Abbey Mills at Merton. Additional theatre provision in the Borough may be limited due to the accessibility and quality of theatres in the larger surrounding towns, especially at London West End.

Hotel Provision

6.49 The UK hotel market represents a significant part of the leisure economy. In the UK there were over 46,000 hotels, guest houses and B&Bs (source: Business in Leisure and Sport 2009 Handbook. The Mayor Tourism Vision for London seeks to provide 40,000 net additional hotel bedrooms by 2026, to improve the quality, variety and distribution of visitor accommodation and facilities. A variety of new facilities is encouraged including within town centres with good public transport access to Central London.

6.50 There are currently 15 hotels within Merton, which tend to be in the small to medium size range and mostly at the lower cost end of the market. Several of these hotels, mainly in Wimbledon, include some conference facilities but there appear to be no sizeable dedicated facilities within the Borough.

6.51 Much of London's hotel demand comes from overseas tourism, with lesser demand from domestic tourism. The international attraction of the Wimbledon tennis tournament is a factor in hotel demand, but only for a relatively short period of the year. Other short term increases in demand may arise from the 2012 Olympics. Forecasts of hotel demand were undertaken for the GLA in 2006 (Hotel Demand Study June 2006) and this implied a need for about 300 more hotel rooms in Merton by 2021. This would be equivalent to several medium sized hotels.

Implications for the Study

A - Leisure and entertainment participation rates are relatively high in the Borough compared with the national average.

B - Merton's residents have good access to a range of commercial leisure, entertainment and culture facilities, including facilities outside the Borough, including Central London, Kingston and Croydon, which may limit market potential for further facilities. Most of the key sectors are represented including cinemas, ten pin bowling, bingo, health clubs, theatres and nightclubs.

C - Nevertheless customers and businesses suggest the provision of leisure and entertainment within Morden, Mitcham and Colliers Wood could be improved. Opportunities to improve provision in these centres should be considered.

D - There may be future potential demand for an additional health club in line with population growth. In addition there will be scope for further Class A3 to A5 uses within retail led mixed use developments.

7.0 Scope for Accommodating Growth

Floorspace Projections

7.1 The floorspace projections set out in the previous sections assume that new shopping facilities within the London Borough of Merton can maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections, particularly after 2016;
- the effect of Internet/home shopping on the demand for retail property;
- the limited current level of operator demand for floorspace in Merton;
- the likelihood that Merton's existing market share of expenditure will change in the future in the face of increasing competition;
- the potential impact new development may have on existing centres.

7.2 Projections up to 2016 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2021 and beyond) shown in Section 5.0 should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development control decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under-review. Information on how the projections should be monitored is contained at paragraphs 9.48-9.49 in Section 9.0.

7.3 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of Internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and Internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in Internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

7.4 The quantitative and qualitative assessment of the potential capacity for new retail floorspace within the previous sections suggests that there is scope for new retail development within the London Borough of Merton. This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

7.5 The projections up to 2016 suggest there is scope for about 2,900 sq m net (4,600 sq m gross) of convenience floorspace and 15,200 sq m net (20,300 sq m gross) of comparison floorspace. In terms of total retail floorspace there is scope for around 24,900 sq m gross by 2016.

7.6 The projections up to 2021 suggest there is scope for about 4,600 sq m net (7,100 sq m gross) of convenience floorspace and 33,200 sq m net (44,200 sq m gross) of comparison floorspace. In terms of total retail floorspace there is scope for around 51,300 sq m gross by 2021.

7.7 These projections relate to Class A1 retail uses only. As indicated in Sections 5.0 and 6.0 there may be scope for a further 20% floorspace that can be occupied by Class A2 to A5 uses and Class A1 non-retail services, i.e. circa. 5,000 sq m gross by 2016 or circa. 10,300 sq m gross by 2021. On this basis the overall projection (Class A1 to A5) for 2021 would be 61,600 sq m gross.

Accommodating Future Growth

7.8 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development. In considering this important issue the following factors should be assessed.

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area e.g. a large part of the London Borough of Merton?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

7.9 All development should be appropriate in terms of scale and nature to the centre in which it is located.

7.10 The existing stock of premises will have a role to play in accommodating projected growth, after the recession. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. Consistent with Experian’s short term turnover efficiency projections and NLP’s lower expenditure growth rate adopted beyond 2012 (0.5% per annum) we believe no growth in convenience turnover efficiency is appropriate. For comparison goods, a growth rate of 2% per annum is assumed after 2012 in line with the adoption of the ultra long term expenditure growth rate of 4.7% per annum. The adoption of these growth rates represents a balanced approach. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

7.11 There were 91 vacant shop units within the nine town, district and local centres in the London Borough of Merton, which equates to an overall vacancy rate of about 9%, which is below the Goad national average (12.5%). The vacancy rate is particularly high in Colliers Wood (16.2%) and North Mitcham (15.7%), and very low in Wimbledon Village (0.8%). The total amount of vacant floorspace is approximately 10,100 sq m gross. Within local parades there are 60 vacant shop units (4,600 sq m gross), a vacancy rate of just under 10%.

7.12 Vacant premises should help to accommodate future growth. As a maximum target the current vacancy level could fall from over 9% to 5% then the number of reoccupied units would be about 80 units, which could accommodate about 7,900 sq m gross of Class A1 to A5 floorspace. Based on existing vacancy levels, this potential re-occupied space could be distributed as follows:

- Wimbledon town centre: 1,500 sq m gross;
- Morden: 700 sq m gross;
- Mitcham: 1,200 sq m gross;
- Colliers Wood: 1,000 sq m gross;
- Raynes Park: 250 sq m gross;
- Wimbledon Village: 0 sq m gross;
- Motspur Park: 120 sq m gross;
- North Mitcham: 630 sq m gross;
- Arthur Road: 200 sq m gross;
- Local parades: 2,300 sq m gross.

7.13 If this reduction in vacant units can be achieved then the overall retail floorspace projection up to 2021 would reduce from 61,600 sq m gross to 53,700 sq m gross.

7.14 The short term priority during the recession should be the reoccupation of vacant floorspace, but this should not preclude investment within appropriate town, district and local centre locations.

Potential Development Opportunities

7.15 A review of potential development sites has been undertaken in the nine town, district and local centres in the Borough. Sites in each centre have been evaluated, in terms of their implications on the scope and need for additional retail and leisure facilities in the Borough. The assessment criteria and analysis is shown in Appendix 7. The sites categorised as having a poor prospect of development are not considered further below.

Wimbledon

7.16 Based on maintaining the existing market shares the requirement for additional floorspace to accommodate new Class A1 to A5 uses in Wimbledon could be about 13,000 sq m gross by 2016 increasing to 28,000 sq m gross by 2021. It may be reasonable to assume that some of this projection (up to about 1,500 sq m gross) could be met by the reoccupation of vacant floorspace in the town centre.

7.17 There are a number of short to medium term potential development sites within Wimbledon town centre that could accommodate floorspace by 2016, as follows:

- Broadway Extension (up to 5,000 sq m gross);
- Car Park adjacent to New Wimbledon Theatre (up to 1,000 sq m gross);
- Park House and 153-161 The Broadway (up to 800 sq m net additional retail); and
- YMCA, 196-224 The Broadway (up to 2,000 sq m gross);
- Collingham House, Gladstone Road/Russell Road (1,200 sq m gross).

7.18 In total these sites could accommodate up to 10,000 sq m gross, and with vacant units (1,500 sq m gross) could accommodate most of the short to medium term floorspace projection up to and beyond 2016 in Wimbledon (13,000 sq m gross).

7.19 In the longer term (between 2016 and 2021, and potentially beyond) it may be possible to accommodate a further 10,000 sq m gross at Wimbledon Bridge House.

Morden

7.20 Assuming expansion and regeneration proposals in Morden district centre, the capacity projections suggest that that the existing Sainsbury store could be doubled in size and additional comparison floorspace of 7,500 sq m gross could be accommodated in Morden by 2021. The reoccupation of vacant floorspace could reduce these projections by around 700 sq m gross.

7.21 Development opportunities within Morden that could help to meet the capacity projection up to 2021, are as follows:

- Land adjacent to Iceland (up to 1,000 sq m gross).
- Land to the rear of Morden Underground Station (over 5,000 sq m gross); and
- Land to the rear of Crown Lane (up to 1,000 sq m gross).

7.22 These sites are more than sufficient to meet projected need up to 2021.

Mitcham

7.23 The requirement for additional floorspace to accommodate new Class A1 to A5 uses in Mitcham could be up to 1,900 sq m gross by 2016 increasing to 3,800 sq m gross by 2021, of which 1,200 sq m gross could be met by the reoccupation of vacant floorspace.

7.24 The main potential development areas within Mitcham that could be considered to meet the remaining projection up to 2021, are as follows:

- Clarendon Grove/Upper Green East (up to 300 sq m gross);
- Land East of Western Road (up to 3,000 sq m gross);
- South Side of Western Road (up to 600 sq m gross); and
- East of Holborn Way/North of Upper Green West (up to 2,500 sq m gross).

7.25 These sites are more than sufficient to meet projected need up to 2021.

Colliers Wood

7.26 Assuming expansion and creation of a district centre at Colliers Wood, the capacity projections suggest that that additional comparison floorspace of 20,000 sq m gross could be accommodated by 2021. The reoccupation of vacant floorspace could reduce these projections by around 1,000 sq m gross.

7.27 In order to create a coherent district centre a number of key development sites would need to be assembled, as follows:

- Land Bounded by Christchurch Road, High Street and Priory Retail Park (Brown & Root Tower site);
- Priory Retail Park; and
- 2-34 Christchurch Road (up to 700 sq m gross).

7.28 This could accord with the Council's longer term aspirations for comprehensive development at Colliers Wood. The creation of a new spine north–south linking the underground station to the Tandem Centre, would 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. Linkages to the Sainsbury/M&S stores could also be improved. These proposals are likely to be long term aspirations.

7.29 The redevelopment of the Brown & Root Tower site could potentially come forward as the first step. The redevelopment of the Priory Retail Park would 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. In order for this radical redevelopment to be commercially viable a significant amount of additional retail floorspace would need to be achieved.

Local Centres

7.30 Separate floorspace projections have not been provide for each local centres, but they could make a contribution towards meeting the global requirement in the Borough. The reoccupation of vacant floorspace in designated centres could accommodate around 1,200 sq m gross. Potential development sites that have also been identified to accommodate development in the local centres and these comprise:

- Land at Lambton Road/Worple Road, Raynes Park (384 sq m gross, short term);
- Car Repair Garage, Pepys Road/Wyke Road, Raynes Park (300 sq m gross, short-medium term); and
- Durham Road/Coombe Lane/Amity Grove, Raynes Park (up to 3,500 sq m gross, medium-long term).

Implications for the Study

A – The occupation of vacant floorspace and increased turnover efficiency within existing floorspace will have an important role in accommodating growth. However additional retail development will be required to meet demand up to 2016 and 2021.

B – There are a number of potential development sites within designated centres that could accommodate growth. These opportunities will need to be considered further within the emerging LDF.

C- Key priorities will be redevelopment proposals in Morden district centre, the creation of a coherent district centre at Colliers Woods and the implementation of current allocations in Wimbledon town centre.

8.0 Affordable Retail Rents

Policy Background

8.1 Policy 4.9 of the Consultation Draft London Plan relating to small shops states:

*"**Planning decisions***

In considering proposals for large retail developments, the Mayor will seek contributions through planning obligations where appropriate, feasible and viable, to support the provision of affordable shop units suitable for small or independent retailers.

LDF preparation

In LDFs, Boroughs should develop local policies where appropriate to support the provision of small shop units."

8.2 The supporting text to this policy (para. 4.49) identifies that in considering proposals for large retail developments (typically over 2,500 sq m), the Mayor will, and boroughs are encouraged to, seek contributions via S.106 planning obligations where appropriate, feasible and viable, to support the provision of affordable shop units suitable for small or independent retailers and secure their availability over time. The number and size of units should be determined on the merits of each case. To secure affordability in the longer term, the agreement should include a guarantee that the small units and the discounted rents remain in being over time.

8.3 Paragraph 4.50 confirms that the appropriateness of application of this policy will depend upon local circumstances. It may be appropriate in some parts of Central London, for example, where small shops are in short supply and affordability is a key concern, particularly for independent retailers and small enterprises. However, the policy may be less appropriate in other parts of London, for example where there is an excess supply of small shop units, low rental values and high vacancy rates. Account should also be taken of site characteristics and practical considerations including design and layout. Viability is also a consideration, including its bearing on development costs and other priority planning obligations.

Analysis

8.4 In the context of the policy background, there are a relatively high proportion of small, vacant units in the district centres of Mitcham, Morden and Colliers Wood. Over 70% of vacant shop units in all designated town, district and local centres are small shop units (under 100 sq m gross). Information from the Valuation Office Agency (VOA) identifies that the average zone A rent for the vacant units in Morden is £251/sq.m, Mitcham is £234/sq.m and Colliers Wood is £257/sq.m. Zone A rents are comparable in Motspur Park and North Mitcham local centres, but levels are higher in Arthur Road (£550/sq.m) and Wimbledon Village (£1,300/sq.m).

8.5 In comparison, in Wimbledon town centre, the average zone A rent for the vacant units is £841 per sq m. The rental figures vary from £135/sq.m for a vacant office building on The Broadway to £1,700/sq.m for a vacant ground floor retail unit in the Centre Court Shopping Centre.

8.6 The Business Occupier Survey asked businesses to rank in terms of importance the factors that contributed to the choice of location when the business started up. In terms of factors that contributed to the choice of location when starting up the business, affordable rents and premises and affordable business rates were scored “very important” by 35.0% and 35.5% of overall respondents. This was most evident in Mitcham, where 66.7% rated affordable rents and premises as either “very important” or “quite important”. Affordable rent was the main reason that businesses were in a particular location for 9.0% of respondents, although overall when giving any reason for the location, 28.5% stated affordable rent was a consideration.

8.7 The implications of the above are that there is a reasonable supply of affordable premises within the district centres of Morden, Mitcham and Colliers Wood, although these may not be good quality or desirable locations and therefore some financial assistance would help their re-occupation. In the Wimbledon town centre and the Village, while there may be some premises available, they are less affordable in terms of rents and rateable values, but these locations are more commercially attractive to occupiers.

Options for Council Intervention

8.8 Variations in rental levels and business rates broadly reflect supply and demand across the Borough. Interventions from the Council would effectively be measures to distort these normal market forces. Interventions could serve two purposes:

- increase demand in areas where property values are low but vacancy levels are still relatively high due to limited demand i.e. in the less buoyant areas of in the southern half of the Borough; and
- provide more affordable accommodation in areas with high demand and property costs in order to provide an better mix of uses e.g. multiples and independents e.g. in the Wimbledon area.

8.9 If the Council is unable to acquire or does not already own retail units that it could be made available at below market rate, an alternative method of helping small or independent retailers would be to provide shop grants, for example to contribute towards fit-out, shop frontages and start up costs. This could be funded through the collection of S.106 payments linked to new retail development.

8.10 As indicated earlier, the overall floorspace projection for the Borough (Class A1 to A5) up to 2021 is about 62,000 sq m gross, of which about 8,000 sq m gross (about 80 units) could be accommodated in vacant shop units (assuming a reduced vacancy rate from 9% of 5%). This leaves 54,000 sq m gross to be provided in new developments. For each square metre of reoccupied vacant shop floorspace there could be about 7 sq m gross of new floorspace developed in the Borough (54,000 sq m divided by 8,000 sq m).

8.11 Fit-out costs for new shop operators vary significantly depending on the type of operation and quality of finish. For small specialist outlets an average cost of up to £500 per sq m may be reasonable, i.e. a small unit of 100 sq m gross could cost up to £50,000 sq m fit-out. The total fit-out cost for re-occupying 8,000 sq m gross of vacant floorspace could be up to £4 million (8,000 sq m multiplied by £500 per sq m). If a grant system was introduced where say 50% of the fit-out cost was available the grant pot would need to be around £2 million.

Grant pot = Reoccupied floorspace X Average fit-out cost X 50%

£2 million = 8,000 sq m X £500 X 50%

8.12 The collection of grant funding through S106 payments from out of centre development could be substantiated on the basis of potential trade diversion and impacts on centres and the need to mitigate against impacts. The most appropriate means to implement this may be a tariff based payment for all proposed retail (Class A1 to A5) development in an out-of-centre or edge of centre locations, linked to the amount of floorspace proposed. For in-centre development the S106 agreement could seek the provision of small affordable units within the development itself, or where this is not possible the normal out of centre tariff could apply for existing vacant units. If around 54,000 sq m gross of Class A1 to A5 floorspace is developed in the Borough by 2021 then about £37 per sq m gross growth tariff would be required to generate a grant pot of £2 million. For example if a 6,000 sq m gross store was proposed the payment would be £222,000. This could be developed further through an amendment to the Council's Supplementary Planning Document on Planning Obligations.

S106 contribution = Gross floorspace proposed X £37 per sq m

8.13 As an alternative the Council could consider subsidising business rates. The rateable value for a typical shop unit of 100 sq m gross in Morden, Mitcham, and Colliers Wood is around £15,000 and the annual business rate payment is about £7,000 (about £70 per sq m). In Wimbledon Village the rateable value for a unit of this size is about £65,000, an annual business rate payment of about £30,000.

8.14 Assuming the lower business rate payment of £70 per sq m, the annual business rate collection for 8,000 sq m of reoccupied vacant floorspace would be £560,000 per annum, therefore a 50% reduction in business rates would cost £280,000 per annum. If £2 million of S106 contributions can be collected from new retail development then new town centre occupiers could be offered a 50% reduction in business rates for say a five year period.

8.15 Either of the approaches above could assist in reducing vacancy levels in areas of low demand or increase diversity in area of high demand. The disadvantage of the business rate approach is it may appear unfair to existing occupiers if new occupiers are offered reductions. The shop improvement grant approach could be available to existing and new occupiers looking to invest.

Implications for the Study

- The reoccupation of vacant shop units in the Borough's designated centres should make a contribution to accommodating growth and improving customer choice.
- If implemented, the projection for new Class A floorspace (up to 54,000 sq m gross) has the potential to generate significant S106 contributions that could be used to improve the take up of vacant shop units in designated centres where occupier demand is low.
- Contributions could also help to promote diversity in centres where demand/property costs are high e.g. Wimbledon Village.
- It appears realistic for new development to generate around £2 million of S106 contributions over the next 10 years (£37 per sq m).
- Assuming 8,000 sq m gross of vacant space is occupied during this period grant or subsidies business rate contributions could be provided as follows:
    - 50% grant for fit-out costs of up to £250 per sq m;
    - 50% reduction in business rates for a five year period for new occupiers, up to £35 per sq m per annum.

9.0 Conclusions and Recommendations

Introduction

9.1 This report provides a Borough wide needs assessment for retail and commercial leisure uses in Merton. It provides a guide to the shopping and leisure needs of the Borough up to 2013, 2016, 2021 and 2026. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in the Borough

9.2 In order to meet projected growth in expenditure, there is a need for additional shopping and service facilities. Future planning policy and site allocations should seek, in line with PPS4, to identify opportunities to accommodate growth, within 5 year periods.

9.3 The floorspace projections shown in this report provide broad guidance and should be used as an indicator when assessing major retail/leisure proposals. Applicants proposing main town centre uses should base their supporting impact assessment on the approach adopted in this study, updated as necessary.

9.4 Meeting the projections between 2010 and 2016 remains the priority. The projections should not be considered to be maximum or minimum limits or targets, particularly when used to guide development control decisions. However, the projections provide a broad quantum of floorspace likely to be required and the potential phasing of development, which will assist in identifying development allocations.

9.5 The retail floorspace and expenditure projections within this report assume low expenditure growth between 2009 and 2012 due to the effects of the recession, but the projections assume a recovery after 2012 in line with previous long term growth trends. If the recovery is slower than envisaged in this study, then the floorspace projections (particularly up to 2016) will need to be re-assessed. It may be prudent to adopt a cautious approach until firmer signs of the economic recovery are established.

9.6 Floorspace projections should not inhibit competition between retailers when located within centres, subject to the consideration of scale and impact. However, if an out-of-centre proposal exceeds the floorspace projections then the need for the proposal and impact will need to be carefully considered.

9.7 Long term forecasts up to 2021 and 2026 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2016 is attributable to projected growth in spending per capita, extrapolated from past growth projections. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review. The implications of major development within neighbouring authorities should also be monitored and the effects proposals may have on the demand for additional development in Merton should be considered carefully. Information on how the projections should be monitored is contained at paragraphs 9.48-9.49 below.

Accommodating Future Growth

9.8 The sequential approach suggests that town centres should be the first choice for retail development. In Merton the preferred location for retail development needs to be carefully considered, particularly for major development which may have an extensive catchment area.

9.9 The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

9.10 Vacant units could also help to accommodate growth in the short term. The strategy should seek to reduce shop vacancy levels from 9% to about 5%, and these reoccupied units could accommodate about 7,900 sq m gross of commercial space i.e. Classes A1 to A5. The introduction of shop improvement grants or business rate reductions could assist in reducing vacancy levels within areas of low demand or areas where small businesses cannot afford high property costs.

9.11 Growth in sales densities and vacant shops will not be able to accommodate all the future growth in retail expenditure, therefore potential development sites need to be identified through the Local Development Framework process to accommodate growth up to and beyond 2016.

Convenience Goods Development

9.12 On the basis of the assumption that existing convenience retailers and commitments trade at national average turnover levels, the quantitative capacity analysis indicates there is potential for 2,900 sq m net (4,500 sq m gross) further convenience goods floorspace within the Borough up to 2016, increasing to 4,600 sq m net (7,100 sq m gross) by 2021. Based on 2010 existing market shares most of this floorspace capacity relates to Colliers Wood and Wimbledon, but in qualitative terms the areas of greatest deficiency are Mitcham and Morden. There is potential to redistribute expenditure capacity from Colliers Wood/Wimbledon to Mitcham and Morden. The regeneration and expansion of Morden town centre provides an opportunity to accommodate an extended Sainsbury's food store (over 3,000 sq m net).

Comparison Goods Development

9.13 The strategy should seek to concentrate future comparison retail development within Wimbledon and Colliers Wood centres. These are the main comparison shopping destinations in the Borough and to maintain their position in the hierarchy it will be necessary to continue to improve comparison shopping facilities. The strategy could seek to designate Colliers Wood as a district centre and seek to maintain the Wimbledon's town centre position in the hierarchy.

9.14 The quantitative capacity analysis indicates that in the short to medium term up to 2016 there could be scope for about 15,200 sq m net (20,300 sq m gross) of comparison floorspace in the Borough as a whole, and this could increase to 33,200 sq m net (44,200 sq m gross) by 2021.

9.15 The Council should seek to identify sites within the designated centres to meet these floorspace projections. Sites identified in the LDF should continue to be explored with the landowner/developers, recognising it may take a number of years to complete complex developments. The Council's aspirations to expand/regenerate Morden and to create a district centre at Colliers Wood provide opportunities to accommodate these floorspace projections, but a critical mass of development will be required to make these proposals viable.

9.16 To achieve this strategy there is potential to redistribute some expenditure capacity to Colliers Wood and Morden. Expenditure growth up to 2021 suggests that the regeneration and expansion of Morden town centre could accommodate an additional 7,500 sq m gross of comparison goods floorspace. Colliers Wood could also accommodate an additional 20,000 sq m gross of comparison floorspace by 2021.

9.17 Elsewhere in the Borough comparison retail development should be consistent in terms of scale and nature of each centre. Development that would serve a significant part of the Borough should be located in Wimbledon or Colliers Wood, generally comparison retail development of 1,000 sq m gross or more.

9.18 Any major comparison retail proposals outside the designated centres will be required to demonstrate compliance with the sequential approach to site selection and that the proposal will not have an unacceptable impact on existing centres and planned investment. Development within centres will also need to be consistent in terms of scale and nature to the role of that centre and the catchment area the centre serves.

9.19 Within Mitcham and Raynes Park and other local centres, the projections suggest there will be limited need for further comparison floorspace up to 2016 (less than 1,000 sq m gross).

9.20 In Wimbledon town centre there is projected scope for about 8,700 sq m net 11,600 sq m gross) by 2016 increasing to 17,200 sq m net (22,900 sq m gross) by 2021, if expansion proposals are implemented in Colliers Wood and

Morden. Development opportunities within the centre should be explored to meet emerging capacity.

9.21 Out-of-centre retail proposals that could jeopardise the potential to provide comparison shopping provision within the designated centres and/or undermine the vitality and viability of the town centre should be resisted.

Commercial Leisure and Other Town Centres Uses

9.22 Merton's residents have good access to a range of commercial leisure, entertainment and culture facilities. Most of the key sectors are provided for including cinemas, ten pin bowling, bingo, health clubs, theatres and nightclubs. There may be future potential demand for an additional health club in line with population growth. In addition there will be scope for further Class A2 to A5 uses within retail led mixed use developments, perhaps around 10% of total floorspace could be allocated to these uses, as set out in paragraph 5.58 to 5.59.

Scale of Development

9.23 Based on the scale and role of centres within the Borough and the floorspace projections within this report, large-scale development which serves a significant part of the Borough should be concentrated within Wimbledon or Colliers Wood centres. These are the main shopping destinations in the Borough centres and should continue to act as the principal centres within the Borough. Generally developments of 1,000 sq m gross or more should be concentrated in Wimbledon town centre, and emerging expansion proposals in Morden and Colliers Wood centres. All development proposals of this scale would still be tested against subject to the tests in PPS4 e.g. impact and the sequential approach, if they are located outside the designated town centres.

9.24 Other shopping facilities outside the five main centres should cater for top-up and basket convenience shopping, services and small scale community uses, but are likely to provide a much more limited range of comparison shopping. Other facilities outside these main centres should only cater for top-up and basket convenience shopping and services, and these developments are likely to be local facilities of up to 280 sq m gross. This threshold has been used as this is the maximum floorspace of retail units before the provisions of the Sunday Trading Act (as amended) come into force.

9.25 The sequential approach indicates that designated centres are the preferred location for new retail/leisure/cultural development. Some forms of development (up to 280 sq m gross) may be more appropriate in smaller centres and local parades, if there are localised areas of deficiency. The key issues are the nature and scale of retail/leisure development proposed and the catchment area the development seeks to serve.

9.26 In general development within local centres and parades should primarily serve the community within which it is located, and a catchment area of not more than 800 metres i.e. they should primarily serve walk-in catchment areas.

9.27 PPS4 requires an assessment of impact to be proportionate to the scale of development proposed and encourages pre-application discussions on the type and level of information required within an impact assessment. PPS4 suggests the impact of retail developments of 2,500 sq m gross or above may need to be considered. Again, based on the scale and role of centres within Merton and the floorspace projections within this report, we believe the impact of smaller development proposals could raise concerns. A retail development of 2,500 sq m gross (convenience or comparison) could exceed or account for a significant proportion of the projected need for retail floorspace in parts of the Borough up to 2016 and could have a significant impact on designated centres in Borough, and the PPS4 threshold is not appropriate for local circumstances.

9.28 We believe the impact of all out-of-centre retail applications of 280 sq m gross or more should be assessed in the Borough. If considered appropriate the Council will need to include these recommendations within the next stages of the LDF.

9.29 The draft Core Strategy could set out floorspace projections for the Borough, as follows:

Up to 2016

- Comparison goods 15,200 sq m net (20,300 sq m gross);
- Convenience goods 2,900 sq m net (4,500 sq m gross);

2016-2021

- Comparison goods 18,000 sq m net (23,900 sq m gross);
- Convenience goods 1,700 sq m net (2,600 sq m gross);

2021-2026

- Comparison goods 20,600 sq m net (28,500 sq m gross);
- Convenience goods 1,600 sq m net (2,500 sq m gross).

9.30 These floorspace figures do not take into account any current proposals without planning permission, expansion proposals in Morden and Colliers Wood or the reoccupation of vacant shop units. The implementation of proposals would reduce these floorspace projections.

The Designation of Centres and Boundaries

9.31 Local planning authorities should adopt a positive and proactive approach to planning for the future of the centres within their areas, whether planning for growth, consolidation or decline. Local planning authorities are expected to set out a vision and strategy for the pattern and hierarchy of centres, including local centres within their area. This strategy should set out how the role of different centres will contribute to the overall vision for their area.

9.32 The current emerging Core strategy identifies Wimbledon as a Major Centre and Mitcham and Morden as District Centres. Colliers Wood is a proposed new district centre following re-designation. Five local centres are identified including Raynes Park and Wimbledon Village.

9.33 Annex A of PPS4 provides guidance on the definition of centres and some clarification on the designation and role of centres. It suggests that city centres are the highest level of centre and will often be a regional centre and will serve a wide catchment. Town centres are usually the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. Wimbledon best fits this description. As a designated Major Centre it serves a wide catchment area covering the Borough and parts of neighbouring Boroughs. Wimbledon offers a reasonable range of comparison shopping and also has a significant service function.

9.34 PPS4 also suggests that *District Centres* will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. The London Plan suggests *District Centres* traditionally provide convenience goods and services for more local communities, although some may have developed specialist shopping functions. There is a wide variation in the scale and nature of the 156 district centres designated in the London Plan.

9.35 It appears the London Plan definition of district centres goes beyond that suggested by the description in PPS4, in terms of the scale and range of facilities available. Some local/neighbourhood centres in London may be similar in size and function to district centres designated outside London.

9.36 In our view Mitcham and Morden are all in line with the London Plan's description for district centres, and there is no need to re-classify any of these centres. Raynes Park and Wimbledon Village (the largest designated local centres) are too small to be classified as district centres, when compared with other district centre identified in the London Plan.

9.37 In terms of the scale of retail facilities, Colliers Wood is larger than Mitcham and Morden, and many other centres designated as district centres in the London Plan. However these facilities are fragmented and poorly linked. Colliers Wood does not currently provide a single coherent centre. If key development opportunities can be delivered then better linkages can be provided, and it may be appropriate to designated Collier Wood as a district centre, i.e. the Brown and Root Tower site, Priory Retail Park and 2-34 Christchurch Road.

9.38 PPS4 indicates that small parades of shops of purely neighbourhood significance are not regarded as centres for purposes of the policy statement.

PPS4 states that local centres include a range of small shops of a local nature, serving a small catchment. The analysis of local centre in Section 4.0 indicates all of the five designated local centres in Merton have a Local Index score of between 8 to 12 (16 is the highest possible score). Most local parades or clusters of local shops have a Local Index of 6 or less, with the exception of:

- Grand Drive (10);
- Coombe Lane West (10);
- Streatham Road (10);
- Northborough Road (9);
- Durnsford Road (8); and
- Kingston Road West (8).

9.39 PPS4 makes a distinction between local centres and smaller parades, but does not give definitive guidance on how local authorities should categorise local centres/shopping parades within their areas. However, PPS4 suggests that the designation of local centres (i.e. anything below district centres) should be defined by local authorities based on local circumstances. There is no set methodology or approach that can be applied from elsewhere. Based on our experience many local authorities have two tiers usually local centres and parades. The Council's designation of local centres and parades is consistent with PPS4 and the London Plan.

9.40 Local centres will generally have between 20 and 100 commercial units and will include a convenience store and a good range of retail and service uses. Small local parades will generally have less than 20 commercial units and be of purely local significance. Very small clusters of local shops and freestanding shops do not necessarily need to be designated as local parades.

Review of Centre Boundaries and Frontages

9.41 Local authorities should adopt policies that enable town, district and local centres to meet the needs of residents in their area. The sequential approach indicates that the first preference for new developments should be within centres followed by edge-of-centre locations. Out-of-centre sites are last in the order of preference. Edge-of-centre sites for shopping purposes are generally within 300 metres of the primary shopping area. The LDF will need to define centre boundaries and primary shopping areas (if different from the town centre boundaries). In practical terms a 300 metre distance from the boundaries of the four main shopping centres in Merton (Wimbledon, Colliers Wood, Mitcham and Morden) will cover a significant area, and it may be necessary to define smaller primary shopping areas within the designated town centre boundaries. Primary shopping areas are usually the area covered by primary and secondary retail frontages, where secondary frontages are contiguous with the primary frontages. Annex B of PPS4 provides definitions of the different types of location, as follows:

Town Centre: defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on the proposals map.

Primary Shopping Area: defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.

Primary Frontage: primary frontages are likely to include a high proportion of retail uses.

Secondary Frontage: secondary frontages provide greater opportunities for a diversity of uses.

9.42 In our view the centre boundaries defined for the main centres in the Borough are relatively widely drawn, for example they include adjacent residential areas, surface car parks, churches etc. These boundaries are appropriate for concentrating town centre uses but may be inappropriate for future retail development i.e. retail development could still be poorly connected to existing retail areas.

9.43 We believe separate primary shopping areas (PSA) should be defined in Wimbledon, Mitcham and Morden and these areas should include only the primary and secondary frontages as designated in the UDP. The PSA will be the area where retail uses will be concentrated, but other town centre uses such as leisure will be appropriate within the wider town centre boundaries. There is no need to identify separate PSAs in local centres.

9.44 PPS4 Policy 3.1 suggest local authorities should define primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in each location. PPS4 indicates primary shopping frontages are likely to include a high proportion of retail use. Secondary frontages provide greater opportunities for diversity of uses. PPS4 provides limited guidance on how uses should be controlled or encouraged in primary and secondary frontages.

9.45 The UDP included policy to protect against the loss of Class A1 uses. Policy WTC3 and WTC4 restricts the loss of any Class A1 use in the defined Primary Shopping Area in Wimbledon town centre. Elsewhere in Core Shopping Frontages non-Class A1 uses are only permitted if criteria are met relating to the retention of a shop frontage/widow display, the centre’s vitality and viability, significant breaks in frontages and residential amenity. The supporting text suggests the maximum level of non-A1 use should be approximately 1 in 3 units (i.e. 33%), and the measured frontage will be taken into account. However it is not clear how this 1 in 3 proportion is to be applied i.e. within individual frontages or the primary shopping frontages as a whole. If it is the later, then this can be difficult to apply because it requires an up to date land use survey. The UDP supporting text only allows breaks in frontage of two adjoining units.

9.46 In Secondary frontages a more flexible approach is adopted for retail use (presumably Class A1 to A5 but this is not clear). This policy also refers to criteria relating to the retention of a shop frontage/widow display, the centre's vitality and viability and residential amenity.

9.47 The primary shopping frontages in Wimbledon, Mitcham and Morden are relatively tightly drawn and the secondary frontages in our view provide appropriate flexibility for non-A1 uses. The approach in primary frontages could be strengthened by including limits on the proportion of non-Class A1 use and maximum breaks in frontages.

9.48 The wording of Policy S2 could include a new criterion that prevents more than three units or 33% of frontage occupied by non-Class A1 use in any 10 shop consecutive units, and no more than 2 adjacent units should be in non-A1 use. This approach would be easier to implement than an overall limit for the primary shopping areas as a whole.

Future Strategy Implementation and Monitoring

9.49 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the Borough, as follows:

- application of guidance within PPS4, particularly relating to the sequential approach and impact tests in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres.
- maintaining the generally high quality environment within each centre;
- bring forward development opportunities through the LDF process to improve the availability of modern premises suitable for new occupiers.
- pro-active approach to site assembly which may require the use of compulsory purchase powers.

9.50 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail and leisure development up to 2016, with longer term forecast up to 2021 and 2026. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available. In particular long-term projections up to 2026 should be treated with caution.

9.51 Therefore, we would recommend that this retail/leisure capacity study should be updated in 4-5 years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Management Horizons, Retail Ranking); and
- implemented development within and around the study area.

9.52 These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended.

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Appendices

12 August 2011

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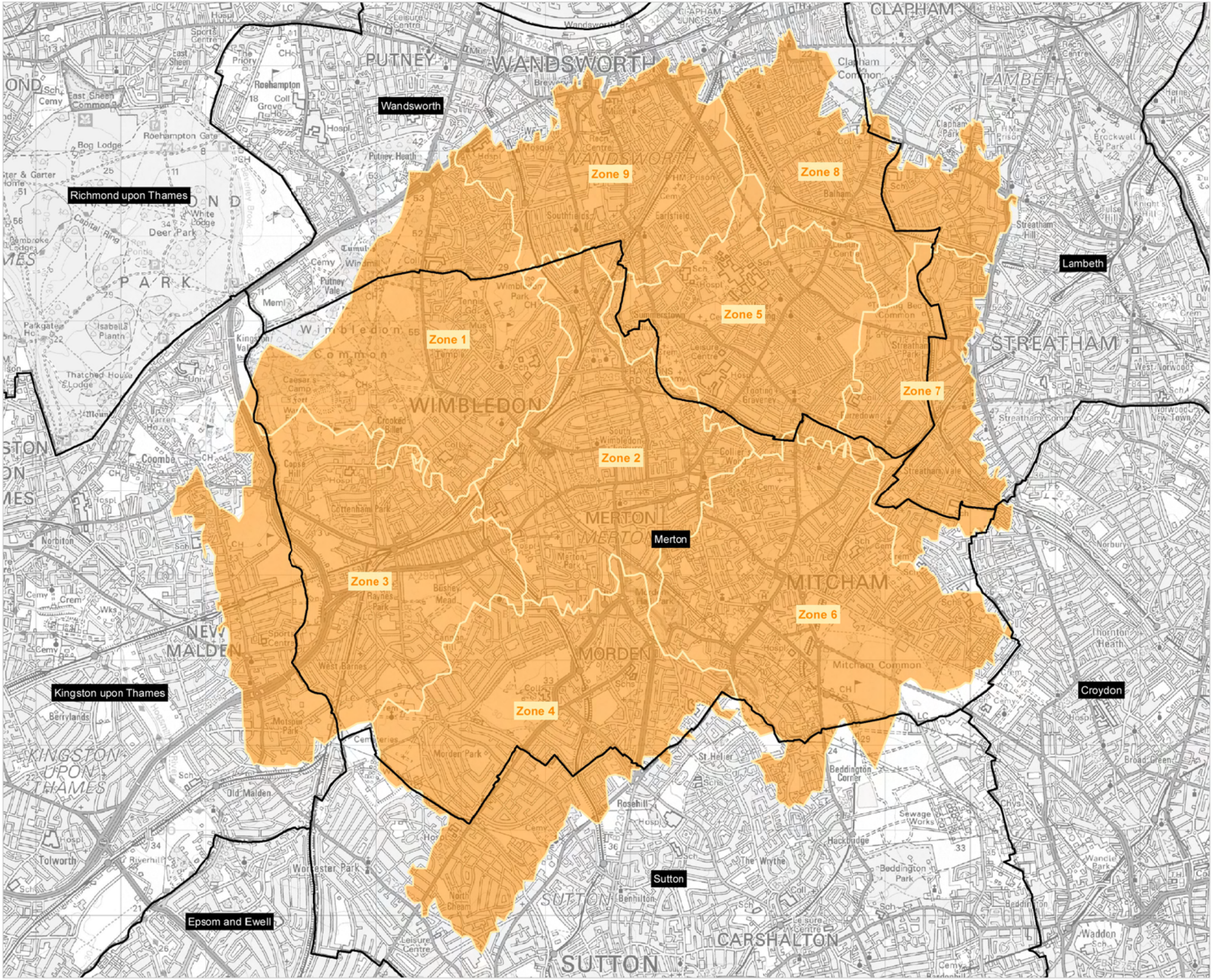
Contents

Appendix 1 Study Area and Methodology



Key

Local Authority Boundary

Zone

Nathaniel Lichfield and Partners

Project	Merton Retail and Town Centre Capacity Study
Title	Catchment Area Plan
Client	London Borough of Merton
Date	02.12.2010
Scale	1 : 40,000 @ A3
Drawn by	MAr
Drg. No	GIS12465-002

N

GIS Reference: S:\CL12465 - Retail & Town Centre Capacity Study, Merton\CL12465 - Retail & Town Centre Capacity Study, Merton - Catchment Area - 02.12.2010.mxd

LB Merton Retail Study Area Zones

Zone	Area	Postcode Sectors
1	Wimbledon West	SW19 4 SW19 5 SW19 6 SW19 7
2	East Wimbledon/ Colliers Wood	SW19 1 SW19 2 SW19 3 SW19 8
3	Raynes Park/ East Kingston	SW20 0 SW20 8 SW20 9 KT3 4 KT3 6
4	North Sutton	SM3 9 SM4 4 SM4 5 SM4 6
5	Tooting	SW17 0 SW17 6 SW17 7 SW17 8 SW17 9
6	Mitcham	CR4 1 CR4 2 CR4 3 CR4 4
7	Streatham	SW16 1 SW16 5 SW16 6
8	Balham/ Clapham	SW2 4 SW11 6 SW12 0 SW12 8 SW12 9
9	Wandsworth	SW18 2 SW18 3 SW18 4 SW18 5

1.0 Retail Capacity Assessment – Methodology and Data

Price Base

1.1 All monetary values expressed in this study are at 2009 prices, consistent with Experian's base year expenditure figures for 2009 (Retail Planner Briefing Note 8.1), which is the most up to date information available.

Study Area

1.2 The study area is based on postcode area boundaries. The extent of the study area is based on the Merton Town Centre Study (2005) and the subsequent update of this Study in 2008 and reflects the proximity of competing shopping destinations, i.e. shopping facilities within Merton are expected to attract their trade from residents within the study area and there will be a minimal level of trade drawn from beyond the study area.

Retail Expenditure

1.3 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 local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2009 have been obtained.

1.4 Experian's EBS national expenditure information has been used to forecast expenditure within the study area in the short term (2009 to 2012). Unlike previous expenditure growth rates provided by The Data Consultancy (formerly URPI), which were based on past trends, Experian's projections are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

1.5 For longer term projections Experian's ultra long term growth rate has been adopted (0.5% for convenience goods and 4.7% for comparison) to project expenditure between 2012 to 2016 and beyond. We believe the Experian's lower EBS growth rates reflect the current economic downturn and provide an appropriate growth rate for the short term. In the longer term it is more difficult to forecast year on year changes in expenditure, and in our view past trend line growth rates provide the most appropriate average growth rate and the potential post recession recovery. These growth figures relate to real growth and exclude inflation.

1.6 For both comparison and convenience spending, a reduction has been made for Special Forms of Trading (SFT) including non-store activity. SFT is included within Experian's Goods Based Expenditure (GBE) estimates. STF 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 provides projections for special forms of trading and e-tailing.

1.7 This Experian information (Retail Planner Briefing Note 8.1 – August 2010) suggests that non-store retail sales in 2009 is:

- 6.4% of convenience goods expenditure; and
- 10.0% of comparison goods expenditure.

1.8 Experian predicts that these figures will increase to 9.6% and 13.9% by 2016. Experian also provides 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, we have adjusted SFT and deducted this from the expenditure projections. Our deduction excludes e-tailing related to retail businesses with shop premises i.e. we have only deducted e-tailing made through mail-order and on-line shopping only business. The deductions are 3.2% and 7.5% of total convenience and comparison goods expenditure respectively in 2009. The projections provided by Experian suggest that these percentages could increase to 4.8% and 10.4% by 2016. 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.

1.9 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

1.10 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector. However, there is still uncertainty about its longer-term prospects. Experian's August 2010 figures suggest that the growth in e-tailing has to a certain extent been at the expense of other forms of home shopping such as catalogue and mail order shopping.

1.11 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

1.12 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 but primarily information gathered through the 2010 household survey.

1.13 The total turnover of shops within the London Borough of Merton is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery retailers 2010) and Mintel (Retail Rankings 2010) information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

1.14 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. 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 2, 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 useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

1.15 The estimated convenience goods sales areas have been derived from a combination of the Council's floorspace surveys, Institute of Grocery Distribution (IGD) and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A in Appendix 2, for consistency with the use of goods based expenditure figures.

1.16 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each town in LB Merton and our experience of trading levels of small independent shops informed by household shopper surveys across London, we have adopted an average sales density of £4,500 per sq m has been adopted for small convenience shops in the Borough, consistent with NLP's experience of retail studies across the country and available turnover information within Mintel's Retailing Rankings 2010. The total benchmark turnover of existing convenience sales floorspace within the Borough is £330.67 million at 2010.

1.17 Mintel's Retail Rankings 2010 provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of

£5,549 per sq m. The average for bulky good retail warehouses is generally lower than this average. Based on our recent experience across the country average sales densities for comparison floorspace can range from £2,000 to £8,000 per sq m net. The higher end of this range is usually only achieved by successful shopping centres, which reflects the higher proportion of quality multiple retailers.

Local Needs Index

1.18 Our analysis splits the local centres and neighbourhood parades into: *large* (more than 45 commercial units), *medium* (between 16 and 44 commercial units) or *small* (15 commercial units or less).

1.19 The key focus in auditing local centres has been in assessing the *'needs'* of local residents and to what extent each is meeting these *'needs'*. There is no clear definition of need, but it is considered that residents in the densely populated Borough could expect to find some or all of the following shops, services and community uses within easy walking distance of their home:

- food or convenience store suitable for top-up shopping;
- bank;
- Post office;
- newsagent;
- off licence;
- takeaway, café or restaurant;
- public house;
- bookmakers;
- laundrette/dry cleaners;
- hairdressers/beauty salon;
- florist;
- estate agents;
- community hall;
- doctor's surgery;
- library; and
- chemist.

1.20 Each local centre has been allocated a score out of 16, based on the number of categories of shops and services listed above (one point per category represented) that are available in the centre. For example, Mitcham town centre provides 15 of the identified categories of shops and services, scoring 15 on the local needs index, which would suggest the local residents of the this area are relatively well served by their local shopping centre. By contrast, Tamworth Lane, Epsom Road, Dundonald Road, Eastfield Road and Haydons Road Neighbourhood Parades only attract a score of 2 or less on the local needs index, which would suggest a very limited level of local needs being met. In addition to this it is important to consider the ability of these centres in meeting top-up shopping needs. Therefore, the number of convenience stores with the ability to provide local top-up shopping (e.g. a grocers, local corner shop or small supermarket) in the parade is also considered.

1.21 The local needs index is not a precise measure of whether a local shopping centre is meeting the needs of local residents, as there are many other factors to consider:

- the relative size a local parade will dictate the range of shops and services each centre can offer;
- the close proximity of other town centres, local centres and '*stand alone*' shops means that local need may be met at an alternative location within walking distance and local needs are therefore still being met;
- the quality of the shopping centre or parade, in terms of its environment, type and range of retailers will effect how it is perceived and used by local residents; and
- the relative accessibility of each centre will be an important factor in how local people use the local shops and services. For example, a major traffic route, which is difficult for pedestrians to cross, may influence shopping patterns in the area.

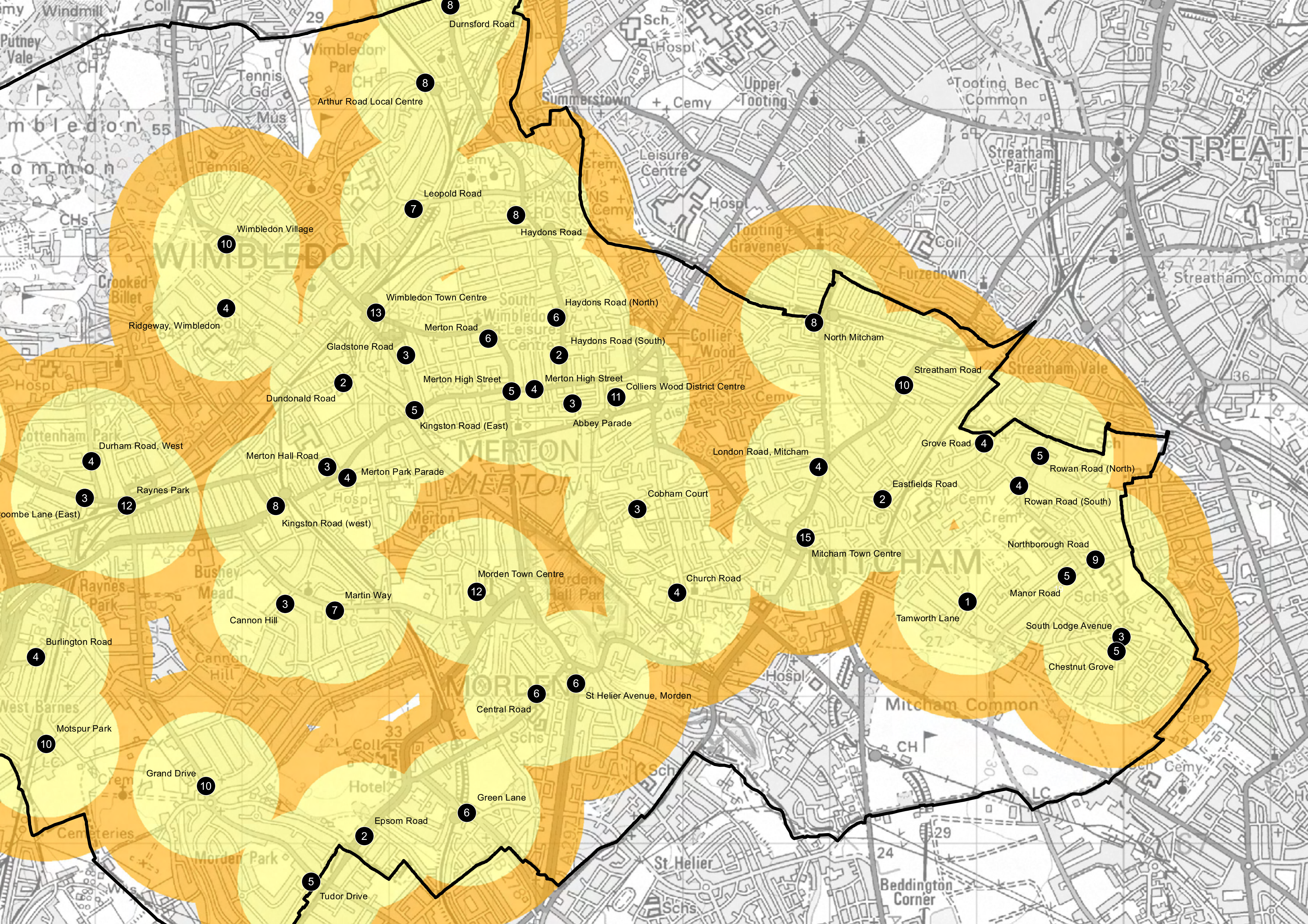
1.22 It is considered that the local needs index provides a useful indicator of whether a local centre or important local parade is meeting some or all the needs of local residents. The Plan at the end of this Appendix shows the areas of the Borough that are beyond 500 and 800 metres of local shopping facilities. The Urban Task Force's Urban Renaissance Paper 1999, chaired by Lord Rogers set out principles for sustainable settlements. The paper suggested that neighbourhood centres should have a catchment area of around 500 metres. The DETR's Planning for Sustainable Development : Towards Better Practice 1998 suggested an easy walking distance was up to 800 metres.

Local Needs Index Summary

Local Centre Name	Size of Centre	Total No. of Units	Local Needs Index	No. of Conv. Stores	No. of Vacant Units	PTAL
Wimbledon TC	Large	261	**13**	16	14	6a
Mitcham DC	Large	152	**15**	19	20	4
Morden DC	Large	154	**12**	19	13	6a
Colliers Wood (proposed DC)	Large	142	**11**	9	22	6a
Raynes Park LC	Large	76	**12**	6	7	3
Wimbledon Village LC	Large	127	**10**	6	1	1b
Streatham Rd.	Large	48	**10**	6	3	1b
Motspur Park LC	Medium	25	**10**	4	2	1b
Grand Drive	Medium	23	**10**	2	0	1b
Coombe Lane (West)	Medium	17	**10**	1	0	1b

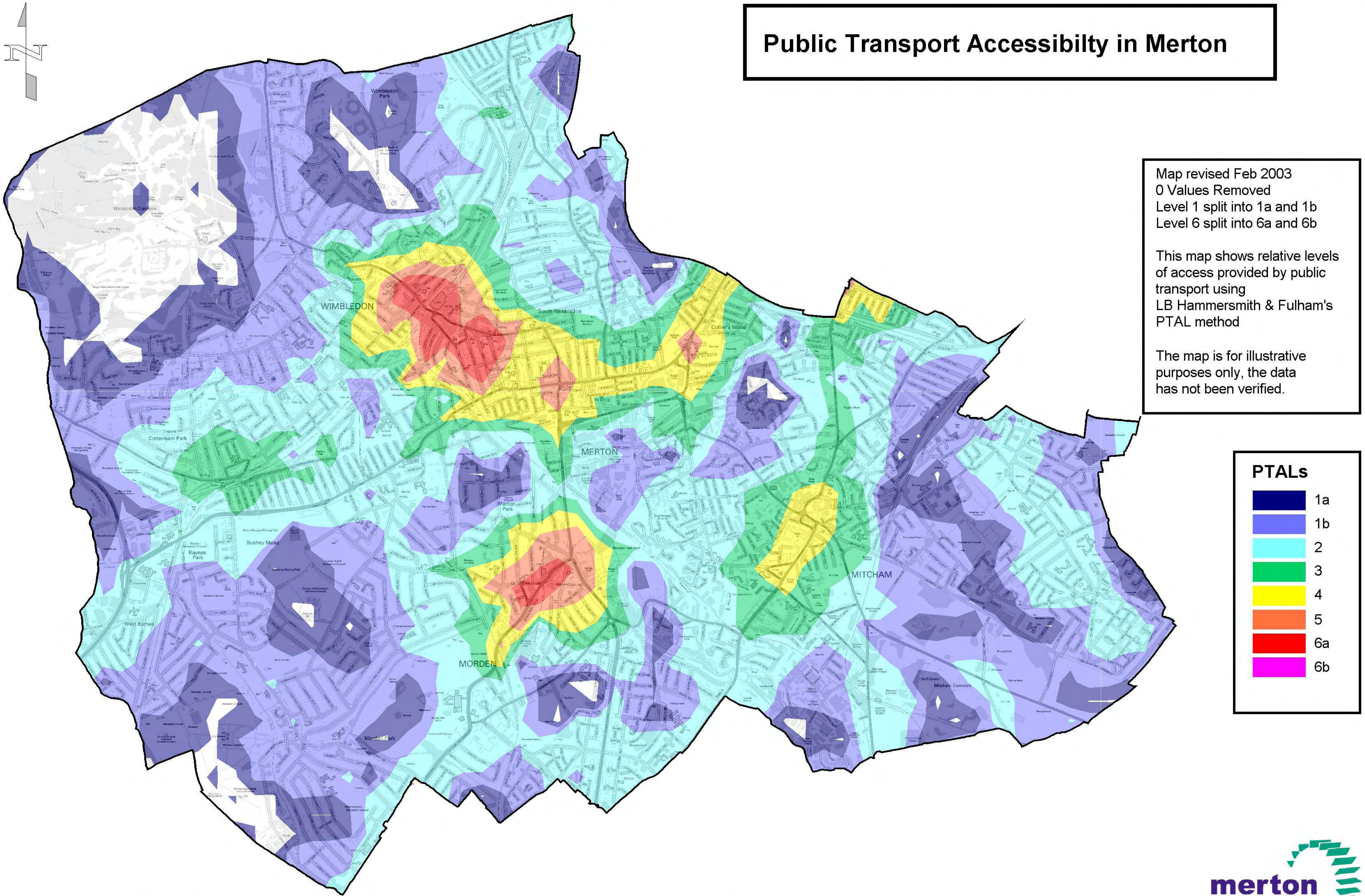
Local Centre Name	Size of Centre	Total No. of Units	Local Needs Index	No. of Conv. Stores	No. of Vacant Units	PTAL
Northborough Rd.	Medium	19	**9**	2	2	2
North Mitcham LC	Large	54	**8**	5	8	4
Haydons Rd.	Large	54	**8**	0	10	2
Arthur Rd. LC	Medium	37	**8**	4	6	3
Kingston Rd. (west)	Medium	26	**8**	2	2	3
Durnsford Rd.	Medium	22	**8**	1	0	2
Leopold Rd.	Medium	26	**7**	2	1	2
Merton Rd.	Large	50	**6**	1	5	3
Green Lane	Medium	18	**6**	2	3	1b/2
Central Rd	Small	14	**6**	2	1	2
St Helier Avenue, Morden	Small	14	**6**	1	0	3
Haydons Rd. (North)	Small	10	**6**	1	1	2
Merton High St.	Medium	23	**5**	2	5	6a
Martin Way	Medium	17	**5**	4	1	2
Kingston Rd. (East)	Small	14	**5**	1	2	4
Tudor Drive	Small	8	**5**	0	0	2
Rowan Rd. (North)	Small	8	**5**	1	0	2
Martin Way	Small	7	**5**	0	0	2
Chestnut Grove	Small	7	**5**	1	2	2
Manor Rd.	Small	7	**5**	1	0	2
Durham Rd. West	Medium	18	**4**	0	0	3
Burlington Rd.	Medium	16	**4**	1	0	2
Merton Park	Small	13	**4**	0	1	3
London Rd, Mitcham	Small	12	**4**	1	1	3
Rowan Rd. (South)	Small	12	**4**	2	0	2
Merton High St.	Small	10	**4**	0	3	4
Ridgeway, Wimbledon	Small	10	**4**	0	0	2
Grove Rd.	Small	7	**4**	1	1	1b
Church Rd.	Small	3	**4**	0	0	2
Abbey Parade	Small	11	**3**	0	1	3
Merton Hall Rd.	Small	8	**3**	1	1	2

Local Centre Name	Size of Centre	Total No. of Units	Local Needs Index	No. of Conv. Stores	No. of Vacant Units	PTAL
Cannon Hill	Small	7	**3**	2	1	1b
Coombe Lane (East)	Small	7	**3**	0	0	3
South Lodge Av.	Small	7	**3**	4	1	2
Cobham Court	Small	5	**3**	1	2	2
Gladstone Rd.	Small	4	**3**	0	0	6
Epsom Rd.	Small	12	**2**	0	1	2
Haydons Rd. (South)	Small	9	**2**	0	0	3
Dundonald Rd.	Small	3	**2**	0	0	2
Eastfields Rd.	Small	3	**2**	0	0	2
Tamworth Ln.	Small	2	**1**	1	0	1b
Total		**1,639**	**n/a**	**135**	**144**	**n/a**



8 Durnsford Road
8 Arthur Road Local Centre
7 Leopold Road
8 Haydons Road
10 Wimbledon Village
4 Ridgeway, Wimbledon
13 Wimbledon Town Centre
6 Haydons Road (North)
6 Merton Road
3 Gladstone Road
2 Haydons Road (South)
2 Dundonald Road
5 Merton High Street
4 Merton High Street
3 Abbey Parade
11 Colliers Wood District Centre
5 Kingston Road (East)
8 North Mitcham
10 Streatham Road
4 Durham Road, West
3 Merton Hall Road
4 Merton Park Parade
3 Coombe Lane (East)
12 Raynes Park
8 Kingston Road (west)
4 London Road, Mitcham
4 Grove Road
5 Rowan Road (North)
4 Rowan Road (South)
2 Eastfields Road
3 Cobham Court
15 Mitcham Town Centre
9 Northborough Road
5 Manor Road
1 Tamworth Lane
12 Morden Town Centre
7 Martin Way
3 Cannon Hill
4 Church Road
4 Burlington Road
3 South Lodge Avenue
5 Chestnut Grove
6 St Helier Avenue, Morden
6 Central Road
10 Motspur Park
10 Grand Drive
6 Green Lane
2 Epsom Road
5 Tudor Drive
WIMBLEDON
MERTON
MITCHAM
MORDEN

Public Transport Accessibilty in Merton



Appendix 2 Existing Retail Facilities

Table 1A - Convenience Shopping Facilities in LB of Merton - Benchmark Turnover (2009 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					
Morrisons, The Broadway	1,979	90%	1,781	£12,689	£22.60
Sainsbury's, Worple Road	1,595	95%	1,515	£12,359	£18.73
Tesco Metro, Old Town Hall	982	95%	933	£12,948	£12.08
Sainsbury's Local, The Broadway	312	95%	296	£12,359	£3.66
Marks and Spencer, Centre Court	929	95%	883	£11,051	£9.75
Convenience shops in Wimbledon TC	874	95%	830	£4,500	£3.74
Sainsburys, Haydons Road, South Wimbledon	194	95%	184	£12,359	£2.28
Sainsburys, Durnsford Road, Wimbledon Park	279	95%	265	£12,359	£3.28
Tesco Express, Wimbledon Hill Road, Wimbledon Village	205	95%	195	£12,948	£2.52
Co-op, Kingston Road, Wimbledon	280	95%	266	£8,959	£2.38
Co-op, Arthur Road	155	95%	147	£8,959	£1.32
Convenience shops in local centres	866	95%	823	£4,500	£3.70
Other convenience local shops	528	95%	502	£4,500	£2.26
Sub-Total	**9,178**		**8,620**	**£10,243**	**£88.30**
Mitcham					
Morrisons, St Marks Road	1,691	80%	1,353	£12,689	£17.17
Lidl, Western Road	1,091	90%	982	£4,668	£4.58
Iceland, Upper Green West	542	90%	488	£6,874	£3.35
Tesco Express, London Road	236	95%	224	£12,948	£2.90
Convenience shops in Mitcham TC	1,505	95%	1,430	£4,000	£5.72
Lidl, Rowan Road, Streatham	1,216	90%	1,094	£4,668	£5.11
Lidl, London Road, North Mitcham	929	90%	836	£4,668	£3.90
Co-op, Streatham Road, Mitcham	211	95%	200	£8,959	£1.80
Convenience shops in local centres	496	95%	471	£4,500	£2.12
Other convenience local shops	1,711	95%	1,625	£4,500	£7.31
Sub-Total	**9,628**		**8,704**	**£6,200**	**£53.97**
Morden					
Sainsbury, London Road	1,831	90%	1,648	£12,359	£20.37
Iceland, Aberconway Road	420	90%	378	£6,874	£2.60
Lidl, Aberconway Road	929	80%	743	£4,668	£3.47
Convenience shops in Morden TC	1,231	95%	1,169	£4,500	£5.26
Other convenience local shops	972	95%	923	£4,500	£4.16
Sub-Total	**5,383**		**4,862**	**£7,374**	**£35.85**
Colliers Wood					
Sainsburys, Merton High St	6,469	70%	4,528	£12,359	£55.97
Marks & Spencer Food Hall	929	100%	929	£11,051	£10.27
Tesco Express, High St	181	95%	172	£12,948	£2.23
Tesco Express, Merton Road, South Wimbledon	206	95%	196	£12,948	£2.53
Convenience shops in Colliers Wood	852	95%	809	£4,500	£3.64
Other convenience local shops	847	95%	805	£4,500	£3.62
Sub-Total	**9,484**		**7,439**	**£10,520**	**£78.26**
Raynes Park					
Convenience shops in Raynes Park LC	547	95%	520	£4,500	£2.34
Convenience shops in Motspur LC	229	95%	218	£4,500	£0.98
Co-op, Grand Drive, Raynes Park	311	95%	295	£8,959	£2.65
Co-op, Coombe Lane, Raynes Park	268	95%	255	£8,959	£2.28
Other convenience local shops	1,266	95%	1,203	£4,500	£5.41
Sub-Total	**2,621**		**2,490**	**£5,485**	**£13.66**
Tesco Extra, Beverley Way, New Malden	7,806	60%	4,684	£12,948	£60.64
MERTON GRAND TOTAL	**44,100**		**36,799**	**£8,986**	**£330.67**
	Comparison Sales Floorspace in Food Stores Sq M Net				**7,301**

Sources: IGD Food Store Directory
LB Merton
Verdict Report on Grocery Retailers
Valuation Office

Table 2A - Convenience Shopping Commitments in LB of Merton - Benchmark Turnover (2009 prices)

Convenience Commitments/Proposals	Net Sales Floorspace Sq M	Convenience Sales Floorspace %	Convenience Floorspace Sq M Net	Turnover Density £ per Sq M	Total Convenience Turnover £M
Waitrose, Raynes Park	1,129	90%	1,016	£11,126	£11.31
Waitrose (former B&Q), Alexandra Road, Wimbledon	1,712	90%	1,541	£11,126	£17.14

Table 3A - Comparison Floorspace in LB of Merton

Centre	Store	Gross Floorspace Sq M	Net Sales Floorspace Sq M
Wimbledon	Town centre comparison shops	42,503	29,752
(Zone 1/2)	Comparison sales in convenience stores	n/a	558
	Wimbledon Village	5,798	3,885
	Wimbledon Hill (Arthur Road) Local Centre	232	155
	Allied Carpets, Plough Lane	833	667
	Carpet Right, Plough Lane	900	720
	Currys, Plough Lane	1,425	1,140
	Wickes, Plough Lane	3,401	2,720
	Topps Tiles, Plough Lane	1,772	1,418
	Homebase, Wier Road, Wimbledon	4,016	3,615
	Other local parades/Other shops	920	616
	Sub-Total	**61,800**	**45,246**
Mitcham	Mitcham District centre comparison shops	4,605	3,085
(Zone 6)	Dreams Beds, London Road	1,021	817
	Comparison sales in convenience stores	n/a	924
	North Mitcham Local Centre	660	442
	Halfords, Streatham Road, Mitcham	1,075	860
	Smyths Toys, Bond Road, Mitcham	2,736	2,189
	Other local parades/Other shops	1,969	1,319
	Sub-Total	**12,066**	**9,636**
Morden	District centre comparison shops	4,188	2,932
(Zone 4)	Comparison sales in convenience stores	n/a	521
	Other local parades/Other shops	710	476
	Sub-Total	**4,898**	**3,928**
Colliers Wood	WH Smith, Tandem Centre	425	340
(Zone 2)	Jessops, Tandem Centre	148	118
	Argos Extra, Tandem Centre	1,020	408
	Boots, Tandem Centre	1,614	1,292
	New Look, Tandem Centre	1,504	1,204
	Next, Tandem Centre	1,002	801
	Mamas & Papas, Tandem Centre	648	518
	TK Maxx, Tandem Centre	1,257	1,005
	Game, Tandem Centre	156	125
	Clarks, Tandem Centre	472	378
	J D Sports, Tandem Centre	684	547
	Sports Direct, Tandem Centre	1,273	1,018
	PC World, Priory Retail Park	1,982	1,586
	Currys, Priory Retail Park	1,758	1,406
	Carphone Warehouse, Priory Retail Park	282	226
	Mothercare, Priory Retail Park	978	782
	Harveys/Rosebys, Priory Retail Park	977	782
	Marks & Spencer, Merton High Street	13,123	8,203
	Comparison sales in convenience stores	n/a	2,045
	District centre comparison shops	2,237	1,499
	Staples, Nelson Trade Park	1,424	1,139
	Homebase, Lee Road, South Wimbledon	3,529	3,176
	Wickes, Lee Road, South Wimbledon	1,913	1,722
	Other local parades/Other shops	2,236	1,498
	Sub-Total	**40,643**	**31,818**
Raynes Park	Raynes Park Local Centre	1,590	1,065
(Zone 3)	Motsput Park Local Centre	392	263
	Other local parades/Other shops	4,236	2,838
	Sub-Total	**6,218**	**4,166**
Shannon Corner	B&Q, Burlington Road	15,073	13,566
(large format)	Maplin, Burlington Road	326	260
	Halfords, Beverley Way	1,024	819
	Paul Simon, Beverley Way	334	267
	Carpet Right, Burlington Road	905	724
	DFS, Burlington Road	1,846	1,477
	Harveys (incl. Sleepmasters) Burlington Road	688	550
	Pets at Home, Bushey Road	2,558	2,046
	Topps Tiles, Bushey Road	757	643
	Tesco Extra, Beverley Way	n/a	3,122
	Sub-Total	**23,512**	**23,476**
GRAND TOTAL		**149,136**	**118,271**

Sources: NLP Site Surveys 2010, Experian Goad and VOA, Table 1A and London Borough of Merton

Table 4A - Expansion Scenarios Expected Turnover (2009 prices)

Comparsion	Gross Floorspace Sq M	Net Sales Floorspace %	Turnover Density £ per Sq M	Total Turnover £M
Colliers Wood	20,000	15,000	£5,975	£89.63
Morden	7,500	5,625	£5,975	£33.61
Convenience Floorspace	**Gross Floorspace Sq M**	**Net Sales Floorspace %**	**Convenience Floorspace Sq M Net**	**Total Convenience Turnover £M**
Colliers Wood	n/a	n/a	n/a	n/a
Morden	2,500	1,500	£12,359	£18.54

Appendix 3 Centre Health Checks

2.0 Wimbledon Town Centre

Introduction

2.1 Wimbledon town centre is the main shopping and commercial centre in the London Borough of Merton. The centre serves shoppers from across the Borough and beyond, particularly for comparison shopping needs, and the centre has a large number and variety of retail and service uses. Retail uses (Class A1 to A5) occupy 64,772 sq m gross (source: LB Merton land use survey and VOA), and Wimbledon is the largest centre in the Borough.

2.2 Wimbledon is identified as a Major centre in the consultation draft London Plan (2009), which are defined as

"centres typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000 sq.m of retail floorspace with a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions."

2.3 The key roles of Wimbledon town centre include:

- **convenience shopping**: provides supermarkets serving main and top-up shopping trips – Morrisons, Sainsburys, Tesco Metro, Marks & Spencer and Sainsburys Local – together with a range of bakers, confectioners, health food stores, off licences and newsagents;
- **comparison shopping**: offers a good range of national multiple and independent retailers. The main higher order retail provision is located within the Centre Court Shopping Centre and The Broadway, and includes two department stores – Debenhams and Elys;
- **services**: provides a range of services including a post office, high street banks, cafés, restaurants, takeaways, travel agents, dry cleaners, hairdressers and beauty parlours;
- **entertainment**: including the New Wimbledon Theatre, Polka Theatre, two cinemas, fitness club and several pubs and bars;
- **community facilities**: provides a range of community services including a library, medical centre, community centre and advice centres.

Mix of Uses and Occupier Representation

2.4 Wimbledon town centre has a total of 261 retail/service uses (excluding non-retail Class A uses). The diversity of uses present in Wimbledon town centre in terms of the number of units is set out in Table 1, compared against the national average.

Table 1 Wimbledon Town Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	114	45.8	42.6
Convenience Retail	17	6.8	9.5
A1 Services (2)	24	9.6	11.6
A2 Services	32	12.9	8.6
A3 and A5	48	19.3	15.2
A4	12	N/A	N/A
Vacant	14	5.6	12.5
Total	**261**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
(1) UK average for all town centres surveyed by Goad Plans (June 2010).
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

2.5 The centre has a slightly higher proportion of comparison retail units than the national average, but a slightly lower proportion of convenience retail units. It would generally be expected that higher order centres have a strong comparison goods offer. The proportion of Class A2 services and Class A3 and A5 uses are above the national average, while the proportion of Class A1 services is marginally below the national average. The proportion of vacant units is less than half the national average.

Retailer Representation

2.6 Wimbledon town centre has a good selection of comparison shops (114), reflecting its role in the retail hierarchy of the Borough. Table 2 provides a breakdown of comparison shop units by category.

Table 2: Wimbledon Town Centre Breakdown of Comparison Units

Type of Unit	Wimbledon		% UK* Average
	Units	%	
Clothing and footwear	31	27.2	26.6
Furniture, carpets and textiles	2	1.8	8.9
Booksellers, arts, crafts and stationers	9	7.9	9.2
Electrical, gas, music and photography	18	15.8	9.6
DIY, hardware and homewares	5	4.4	6.8
China, glass, gifts and fancy goods	3	2.6	3.8
Cars, motorcycles and motor access.	0	0.0	3.1
Chemists, drug stores and opticians	14	12.3	9.2
Variety, department and catalogue	4	3.5	1.5
Florists, nurserymen and seedsmen	0	0.0	2.4
Toys, hobby, cycle and sport	12	10.5	5.1
Jewellers	6	5.3	5.0
Other comparison retailers	10	8.8	8.8
Total	**114**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
** UK average for all town centres surveyed by Goad Plans (June 2010).*

2.7 The majority of comparison categories are represented in the centre, with the exception of cars/motorcycles/motor accessories and florists/nurserymen/ seedsmen.

2.8 The centre provides a noticeably higher proportion of electrical/gas/music/ photography, chemists/drug stores/opticians and toys/hobby/cycle/sport retailers than the national average. The proportion of clothing and footwear units is similar to the national average, while the proportion of typical "bulky goods" retailers such as DIY and furniture are below the national averages.

2.9 Major national multiple comparison retailers present in the centre include Debenhams, Argos, Boots, WH Smith, Next, TK Maxx, Gap, HMV, Waterstones and Currys. The national multiple retailers are mainly located within the Centre Court Shopping Centre and on The Broadway.

2.10 National convenience operators include Morrisons, Sainsburys, Tesco, Marks & Spencer and Greggs.

2.11 The results of the in-street survey undertaken in Wimbledon town centre indicate that 46% of visitors found the range of shops and services to be quite good, 14% very good and 30% neither good nor poor. Similar results were recorded when people were asked to rate the quality of shops and services available.

Service Uses

2.12 Wimbledon has a good range of service uses, with all categories represented, as shown in Table 3. The representation of categories is generally similar to the national average, with the exception of a higher proportion of restaurants/ cafés/takeaways and a lower proportion of hairdressers/beauty parlours.

Table 3: Wimbledon Town Centre Analysis of Selected Service Uses

Type of Unit	Wimbledon		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	48	51.6	44.4
Banks/other financial services	11	11.8	14.0
Estate agents/valuers	13	14.0	11.3
Travel agents	3	3.2	3.9
Hairdressers/beauty parlours	15	16.1	23.5
Laundries/dry cleaners	3	3.2	2.9
Total	**93**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
** UK average for all town centres surveyed by Goad Plans (June 2010).*
N.B. 'Restaurants, cafés and takeaways' does not include drinking establishments in the centre.

2.13 Other uses within Wimbledon town centre include two theatres, two cinemas, fitness club, several pubs and bars, a library, medical centre, community centre and advice centres.

Vacant Units

2.14 There are 14 vacant retail units within Wimbledon town centre at the time of the Council's Land Use Survey 2010. The vacancy rate (5.6%) is less than half the national average of 12.5%. Vacant units are spread throughout the centre and are generally small units. The largest vacant unit in the centre is a former bar at 153 The Broadway (approximately 800 sq.m gross). At the time of the survey, there was one vacant retail/café unit on each floor of the Centre Court Shopping Centre.

2.15 The former Woolworths store has been reoccupied by TK Maxx, and the ground floor of the development at The Broadway/Stanley Road is occupied by Sainsbury Local and Jimmy Spices restaurant.

Commercial Property Indicators

2.16 Wimbledon town centre has the strongest (lowest) retail yield of the main centres in the Borough. The yield has improved from 7% in 2004 to 5% in 2008. The 2008 yield in Wimbledon town centre compares favourably with other similar sized centres in South West London, e.g. Croydon (6%), Sutton (7.5%) and Putney (5.5%). Kingston on Thames is the only centre with a stronger yield (4%).

2.17 Prime Zone A rents in Wimbledon town centre have reduced to £1,507 per sq m in 2010 from the peak of £1,722 per sq m in 2008. Wimbledon still out-performs Sutton (£753), Putney (£969), Clapham Junction (£1,453) and Wandsworth, but rental levels are much higher in Kingston (£2,960), Richmond (£1,938) and Croydon (£2,960). These are the prime (highest) zone A rents achieved. Valuation office information suggests Zone A rents in peripheral parts of the town centre i.e. can be a low as £300 per sq m.

2.18 Overall retail commercial values are relatively strong in the core area of Wimbledon town centre, but are still much lower than in prime pitch units in Kingston or Croydon.

Catchment Area and Visitor Profile

2.19 The in street survey indicates that the main reason people visit Wimbledon is to undertake food shopping (44%). When asked what people intend to buy in Wimbledon, 73% stated food and groceries, followed by clothing and footwear (15%). The average spend per visitor on food and grocery was £50, on non-food goods was £15 and just £2 on eating/drinking out. The majority of people spend between 1 and 1½ hours in Wimbledon per visit and will visit Wimbledon once a week.

2.20 In Wimbledon town centre, 25% of visitors interviewed in the in street survey were from households within the most affluent socio-economic groups (A/B professional/managerial). Just 9% were from the lowest socio-economic group (D/E non-skilled) compared to 15% in Morden, 26% in Mitcham and 21% in

Colliers Wood. These results suggest the centre attracts a range of different socio-economic groups.

Accessibility and Movement

Car Parking

2.21 The in street survey in Wimbledon town centre identified that 53% of visitors travelled by car (drivers and passengers) to get to the centre. Therefore levels of accessibility to convenient car parks are important to the vitality and viability of the town centre. Major car parks within the town centre include Centre Court Shopping Centre, Hartfield Road (Morrisons), Broadway car park (adjacent to the New Wimbledon Theatre), Sainsburys supermarket, St Georges Road and Wimbledon Bridge House car park.

2.22 50% of those interviewed in Wimbledon town centre rated the availability of car parking in the centre as quite good. 16% rated the availability of car parking as either quite poor or very poor. In terms of parking charges, 29% rated these as quite good or very good, and 26% rated these as quite poor or very poor. Car parking issues were raised by 17.2% of respondents to the household survey, with 10.9% stating “more car parking” and 5.8% stating “free/cheaper parking” would make people shop more often in Wimbledon town centre.

Public Transport

2.23 Wimbledon town centre is highly accessible by public transport and has a PTAL rating of 6a. The station provides main line access to London Waterloo, Kingston, Epsom and Woking as well as local centres including Raynes Park and Motspur Park. Wimbledon is also located on the District Line underground line, which connects to Earls Court, Westminster, Victoria and other central London locations. Wimbledon is also connected via tram to Croydon and Elmers End.

2.24 There are a number of bus routes providing access to Wimbledon from surrounding areas in the Borough and beyond, connecting Wimbledon to numerous destinations including Kingston, Streatham, Sutton, Mitcham, Clapham, Raynes Park, Richmond and Putney.

2.25 The in street survey identified that 10% of respondents had travelled to Wimbledon town centre by bus/coach, 9% by train/tube and 3% by tram. 47% rated bus service within Wimbledon as either quite good or very good. Only a small proportion of the respondents to the household survey suggested that improvements to public transport would make people shop more often in Wimbledon town centre. This suggests that overall there is a high proportion of shoppers using public transport and the provision is considered to be generally good.

Traffic Congestion and Accessibility

2.26 Traffic congestion was highlighted as a problem by visitors, with 36% rating this as either quite poor or very poor. When asked what improvements people would like to see to Wimbledon town centre, 5% responded remove/reduce traffic congestion, which was the highest scoring response that did not relate to the range or quality of shops and services. 6% of respondents to the household survey suggested that more traffic free areas/pedestrianisation would make them shop more often in Wimbledon town centre. At the time of the NLP visits, the centre was subject to a substantial amount of roadworks, particularly around the station, affecting traffic congestion and accessibility.

Pedestrian Access and Movement

2.27 Wimbledon is essentially a linear centre extending along The Broadway, Wimbledon Bridge and Wimbledon Bridge Road. Centre Court Shopping Centre is the an enclosed, pedestrianised shopping centre, and there is a pedestrian walkway from The Broadway between Morrisons and the Odeon cinema through to Hartfield Road. Although the vehicular routes through the centre are generally busy with traffic, there are a number of pedestrian crossings provided throughout.

2.28 Pedestrian flows tend to be heaviest within the Centre Court Shopping Centre and the station, and by the main entrances to the Morrisons, Sainsburys and Tesco Metro stores. Pedestrian flows are significantly lower on the periphery of the centre where there are more independent smaller units. 24% of respondents to the in street survey had travelled to Wimbledon town centre on foot.

Environmental Quality

2.29 The quality of buildings within Wimbledon town centre is generally mixed. The more modern units in the vicinity of the Centre Court Shopping Centre and Morrisons are distinctive in style and in good condition. New developments within the centre, such as the scheme at The Broadway/Stanley Road are of a high quality design.

2.30 Wimbledon town centre contains two conservation areas – Wimbledon Broadway Conservation Area and Wimbledon Hill Road Conservation Area – and the New Wimbledon Theatre, Old Town Hall and the Old Fire Station are listed buildings.

2.31 In terms of responses from the in street survey rating the environmental quality of the town centre, 61% considered the general shopping environment to be either quite good or very good, 48% rated the planting/landscaping as quite good or very good and 52% considered the layout of the centre to be quite good or very good. This suggests that shoppers are generally satisfied with the overall quality of the environment of Wimbledon town centre.

Stakeholder Feedback

2.32 Feedback from stakeholders raised the following issues relating to Wimbledon town centre.

- Wimbledon is the strongest centre in comparison to the other centres within LB Merton.
- In Wimbledon multiple retailers require larger units than currently available.
- There is a good mix of multiples and independents although premium retail rents is prohibitive to small independent retailers, and a better balance is needed.
- It is a highly accessible town centre and this need to be promoted to encourage its continued growth in the sub-region.
- Ongoing works to the public realm (including works to the station forecourt) is enhancing the environmental quality of the centre.
- A new initiative is taking place in Wimbledon: 'Business Improvement District'. It is hoped to have this established by April 2012. This will encourage business to have a business plan for the locality and the Council may relax business rates; encouraging additional services in area i.e. more police. Attracting business will help promote the vitality of the town centre.
- BID will include 50% retail. This may help encourage higher end national multiple retailers.
- Employment land is a weakness in Wimbledon. There is a lack of suitable floorspace to attract a high calibre of corporate business.
- There is a need to promote Wimbledon as a leisure destination to compete with nearby Kingston.
- Consideration should be given as to whether you continue to "invest in the best" to help the rest improve, or let the best look after itself.
- There is a view that if Wimbledon is supported, this will be good for Merton providing a strong employment source for local jobs.
- Cultural facilities promoted in the centre should include events, activities and meeting places to give centres an identity, and not just leisure facilities such as bars, bingos, private health clubs and ten pin bowling events.

Summary of Wimbledon's Strengths and Weaknesses

Strengths

- Wimbledon town centre has a good range and choice of national multiple and independent retailers, and is the main comparison shopping and leisure destination in the London Borough of Merton.

- The centre has a slightly higher proportion of comparison retail units than the national average, and the majority of categories of comparison retailers are represented.
- Food and grocery provision in the town centre is suitable for both main and top up food shopping, and the centre contains four supermarkets – Morrisons, Sainsburys, Tesco Metro, Marks & Spencer – together with a range of smaller convenience goods units.
- The town centre provides a good range of service facilities and uses complementary to its main shopping role, including leisure and entertainment facilities.
- The vacancy rate is low (5.6%) and is less than half the national average, which suggests demand for premises remains relatively strong.
- Overall retail commercial values are relatively strong in the town centre, but are still much lower than in Kingston and Croydon.
- The centre has very good public transport accessibility, and has a good provision of car parking for shoppers.

Weaknesses

- The centre does not offer the same quality and range of facilities available in Kingston, Croydon or London's West End, especially clothing and footwear, and customers to Wimbledon will also shop in these other centres.
- There is a limited supply of premises available to accommodate new operators looking to trade in Wimbledon.
- The linear form of the centre may prevent shoppers visiting the whole of the centre during their visit.
- Traffic congestion and roadworks have an adverse impact on the shopping environment.

3.0 Morden District Centre

Introduction

3.1 Morden is defined as a District Centre within the emerging Local Development Framework and within the London Plan. It is a relatively compact centre with the majority of retail units fronting London Road. There are also several units along Abbotsbury Road, Crown Lane and Morden Court Parade. The centre serves a local function to its visitors, primarily offering a convenience and retail service function. Retail uses (Class A1 to A5) occupy 15,813 sq m gross (source: LB Merton land use survey and VOA), and Morden is the third largest centre in the Borough, just ahead of Mitcham, but significantly smaller than Wimbledon town centre or Colliers Wood. Merton's Civic Centre (Council Offices) and the Baitful Futuh Mosque are located within Morden.

Mix of Uses and Occupier Representation

3.2 There are 154 units within Morden District centre. The diversity of uses present in Morden on the basis of the number of units and amount of floorspace is shown in Table 1 below. This is derived from information provided by the London Borough of Merton land use survey.

Table 1 Morden District Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	33	21.9	42.6
Convenience Retail	23	15.2	9.5
A1 Services (2)	18	11.9	11.6
A2 Services	29	19.2	8.6
A3 and A5	35	23.2	15.2
A4	3	N/A	N/A
Vacant	13	8.6	12.5
Total	**154**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
(1) UK average for all town centres surveyed by Goad Plans (June 2010).
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

3.3 The representation of convenience, financial and professional services and restaurants and café uses are higher than the national average. The amount of comparison retailers is significantly lower than the national average. This suggests that Morden plays a retail service role for local residents and the local workforce. The vacancy rate is lower than the national average.

Retailer Representation

3.4 Morden has three main food stores in the centre: Sainsburys; Lidl and Iceland.

3.5 Morden has a relatively low number of comparison retailers within the centre. As detailed in Table 2, the proportion of units in: furniture, carpets and textiles; electrical, gas, music and photography; china, glass, gifts and fancy goods; chemists, drugstores and opticians and florists is above the national average. The proportion of clothing and footwear retailers is significantly below the national average at 6.1% of all units.

Table 2: Morden District Centre Breakdown of Comparison Units

Type of Unit	Morden		% UK* Average
	Units	%	
Clothing and footwear	2	6.1	26.6
Furniture, carpets and textiles	3	9.1	8.9
Booksellers, arts, crafts and stationers	1	3.0	9.2
Electrical, gas, music and photography	5	15.2	9.6
DIY, hardware and homewares	1	3.0	6.8
China, glass, gifts and fancy goods	2	6.1	3.8
Cars, motorcycles and motor access.	1	3.0	3.1
Chemists, drug stores and opticians	8	24.2	9.2
Variety, department and catalogue	2	6.1	1.5
Florists, nurserymen and seedsmen	1	3.0	2.4
Toys, hobby, cycle and sport	1	3.0	5.1
Jewellers	1	3.0	5.0
Other comparison retailers	5	15.2	8.8
Total	**33**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
** UK average for all town centres surveyed by Goad Plans (June 2010).*

3.6 There is a relatively low presence of national comparison retailers within Morden. This is limited to Powerhouse, Holland and Barrett, Specsavers, Boots the Chemist and Superdrug. The centre has not got a major clothing retailer or major department store presence.

Service Uses

3.7 Morden has a good range of service uses within the centre, and in total, this is higher than the national average as shown in Table 1. All GOAD categories are represented in the centre, as shown in Table 3. There is a high proportion of restaurants, cafes and takeaway units in the centre and this accounts for over half of the units in retail service use. The proportion of units in use as laundrettes and dry cleaners in the centre is also above the national average.

3.8 Many of the main High Street banks/ building societies are represented within Morden. This includes Nationwide, Natwest, Lloyds TSB and HSBC.

3.9 The centre also has a number of national operators including Subway, Wimpy, Pizza Hut and Dominos Pizza.

Table 3: Morden District Centre Analysis of Selected Service Uses

Type of Unit	Morden		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	35	56.5	44.4
Banks/other financial services	8	12.9	14.0
Estate agents/valuers	5	8.1	11.3
Travel agents	2	3.2	3.9
Hairdressers/beauty parlours	9	14.5	23.5
Laundries/dry cleaners	3	4.8	2.9
Total	**62**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
** UK average for all town centres surveyed by Goad Plans (June 2010).*
N.B. 'Restaurants, cafés and takeaways' does not include drinking establishments in the centre.

Vacant Units

3.10 There are 13 vacant units within the centre which equates to a vacancy rate of 8.4%. This is lower than the national average which is 12.5% (2010). There is no evident cluster of vacant units within Morden, these are located sporadically through the centre.

Other Uses

3.11 In addition to Class A uses, Morden town centre has a variety of non retail uses including the Civic Offices, a dentist, legal advice centre, police station and offices.

Commercial Property Indicators

3.12 Retail yields in Morden have weakened since 2003, down from 9% to over 10% in 2008. The 2008 yield is much weaker than in Wimbledon town centre (5%), which, along with likely lower rental values, suggests retail property values in Morden are a fraction of those in the primary area of Wimbledon town centre.

3.13 Valuation data suggests Zone A retail rental levels in Morden range from £175 to £480 per sq m. Prime rental levels are less than a third of those in Wimbledon town centre.

Catchment Area and Visitor Profile

3.14 The main reason people visit Morden is for work/ business purposes (24%), closely followed by shopping for food goods (22%, NEMS In-Street Survey, November 2010). When asked what people intend to buy in Morden, 57% stated food and groceries whilst 32% stated that they did not intend to do any shopping. Just under half the respondents claimed they were intending to spend approximately £10-£30 on food and grocery products. The majority of people who visit Morden plan to spend approximately 1 hour at the centre (76%) and visit the centre 2-3 times a week.

Accessibility and Movement

3.15 The centre is a linear centre which is focused along the A24, a main arterial route into London. The presence of this main road running through the centre does obstruct pedestrian movement through the centre.

3.16 Of those surveyed by NEMS (In Street Survey), 35% travelled to the centre by bus and 30% walked. 20% travelled to the centre by car. The Volterra Economic Assessment for Morden indicates a larger number of people pass through Morden, but a significant proportion do not shop or use services in the town centre.

Car Parking

3.17 Car parking is provided at a number of locations in the centre. 22% of respondents from the In Street survey considered that the availability of parking was 'quite good' and 18.5% agreed that parking charges were also 'quite good'.

3.18 The car parks within the centre include Peel House car park, a multi-storey car park adjacent to Sainsburys. This multi storey car park operates a dual charging system with the lower deck of the car park charges allocated for short stay parking (£0.60 for two hours, the maximum period for stay). The upper deck is available for parking all day at £4.50, or £1 for up to 2 hours.

3.19 Other car parks within the centre include a surface level car park to the rear of the Lidl store, providing in excess of 100 spaces; York Close surface level car parking to the south of the centre, which is a 24 hour car park providing over 250 spaces. In addition there is also a car park providing over 100 spaces at Keenly Road and a car park at Morden Station providing over 100 spaces.

3.20 The car parks are located to the rear of the main food stores and adjacent to the train station. They are therefore within easy reach of the centre.

Public Transport

3.21 The PTAL rating for Morden district centre is 6a, which shows the public transport accessibility of the centre is very good. The bus depot for the sub-region is located in Morden. This bus interchange is strategically linked with the underground station. There is a tram stop a short walk from the centre and Merton South train station is within walking distance.

3.22 Morden town centre is served by an underground station which provides services along the northern line to central and north London. The centre is also served by a number of bus routes. Over 80% of respondents to the In Street survey stated that the bus service in Morden was either 'very' or 'quite' good. The majority of bus stops are located along London Road and provide services to Colliers Wood, Wimbledon, Epsom and Putney, in addition to surrounding residential areas. Morden town centre has excellent public transport links and is a strategic node within the wider network,

Traffic Congestion and Accessibility

3.23 At the time of our visit, traffic was heavy through the centre. The core of the shopping centre is focused along London Road (the A24). The A24 is a heavily congested route through the borough, connecting Morden with South Wimbledon, North Cheam, Epsom and Ewell.

3.24 Despite this observation, only 35% of respondents to the In Street survey considered that traffic congestion in the centre is ‘quite’ or ‘very’ poor.

Pedestrian Access and Movement

3.25 Heavy traffic flows through the centre is an obstruction, with the A24 acting as a barrier to pedestrian movement.

3.26 The centre is surrounded by residential areas and therefore accessibility by foot is essential. There are a number of pedestrian crossings along London Road, although this does contribute to congestion in the area.

3.27 The heaviest pedestrian flows at the time of the visit were outside the Underground Station and outside the Sainsburys Store. Peripheral parts of the centre had a steady flow of pedestrians.

Environmental Quality

3.28 The buildings are within the centre are generally of a similar era (1960s). The station is of 1920s style and in need of regeneration. Similarly, some facades adjacent to the station are in need of improvement. At the north of the centre buildings are mostly of inter war style, with some modern infill such as the 1980s style Sainsburys Unit and the Lidl unit.

3.29 Pavements are generally wide, which aids pedestrian movement, although they do get narrower towards the Lloyds TSB unit. The centre provides some litter bins, benches and cycle racks. There is a good array of landscaping features within the centre, which enhances the environmental quality. Outside the Civic Centre, the environmental quality is good.

3.30 There are mixed views of visitors to the centre over their perception of the environmental quality of the centre. Around 30% of respondents to the In Street survey contended that the general shopping environment was ‘quite good’ whilst another 30% considered it to be ‘quite poor’. The majority considered that planting and landscaping was poor.

Stakeholder Feedback

3.31 Feedback from stakeholders raised the following issues relating to Morden.

- “More Morden” Investment is planned but whether there is a market to support this was questioned i.e. will developers commit to this centre?
- Investment in the centre will need to be developer led.

- Good accessibility links will help to promote the centre.
- The centre is currently managing decline.

Summary of Morden's Strengths and Weaknesses

Strengths

- The Civic centre and Baitful Futuh Mosque attract significant numbers of people to Morden and provide regular trade for shops and services in the town centre.
- The centre offers a good range of convenience retail units. The majority of visitors to the centre purchase food and grocery products and the retail offer reflects the centre's local function.
- The centre also provides a good range of retail service uses, including a high proportion of restaurant, cafes and takeaways.
- The accessibility of the centre is good, providing an underground station and a number of bus services to nearby centres and residential areas. There is also a good variety of car parking facilities providing opportunities for long and short term stays.

Weaknesses

- The centre has a low proportion of comparison retailers. There is no major clothing multiple retailers, or a large department store.
- The A24 road runs through the centre, contributing to congestion and prohibiting pedestrian movement through the centre.
- There are very few large retail units within the centre, which will prevent some retail operators locating in this centre.
- Current retail property values in Morden have weakened since 2003, and are a fraction of those in the primary area of Wimbledon town centre.
- There are no published zone A retail rent figures for Morden and there is an insufficient pool of recent transactions to establish the up to date average.
- Morden had the lowest levels of satisfaction amongst visitors interviewed in the centre compared with the other main centres in the Borough, with negative scores for 15 out of the 19 aspects rated (see Table 10 in Appendix 9,
- Morden had the lowest levels of satisfaction amongst occupiers in the centre compared with the other main centres in the Borough, with negative scores for 15 out of the 19 aspects rated (see Table 11a in Appendix 10,

4.0
Mitcham District Centre

Introduction

4.1 Mitcham is defined as a District Centre within the emerging Local Development Framework and the London Plan. Mitcham District Centre is located towards the east of the borough. It is the third largest centre in the borough, after Wimbledon and Morden, in terms of the number of retail units. Retail uses (Class A1 to A5) occupy 14,579 sq m gross (source: LB Merton land use survey and VOA), and Mitcham is the fourth largest centre in the Borough, just behind Morden. It is significantly smaller than Wimbledon town centre or Colliers Wood.

4.2 The retail units are spread over a relatively wide area and are focused along London Road, Western Road and Upper Green Way. A semi-covered row of retail units is located along Majestic Way, which is where the majority of national multiple retailers are located.

Mix of Uses and Occupier Representation

4.3 The centre primarily provides a local shopping role to residents to the east of the borough, fulfilling their day to day shopping needs. The convenience and Class A1 and A2 retail service provision is higher than the national average. The proportion of units in comparison retail use is significantly lower.

Table 1 Mitcham District Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average [1]
Comparison Retail	36	24.2	42.6
Convenience Retail	23	15.4	9.5
A1 Services [2]	27	18.1	11.6
A2 Services	21	14.1	8.6
A3 and A5	23	15.4	15.2
A4	2	N/A	N/A
Vacant	19	12.8	12.5
Total	**151**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
(1) UK average for all town centres surveyed by Goad Plans (June 2010).
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

Retailer Representation

4.4 The main convenience offer for the centre is provided by the Lidl store located along Western Road, Iceland located on Upper Green East and the Morrisons Store located at Majestic Way.

4.5 The centre has a relatively poor comparison offer, and does not provide all comparison sectors as identified by GOAD. The strongest offer provided is the chemists, drugstores and optician category, closely followed by clothing and footwear (although the latter is significantly below the national average). The proportion of units in DIY, hardware and homewares use; and electrical, gas, music and photography use is above the national average. Sectors not represented include china, gifts, glass; toys, hobbies, cycle and sport; and jewellers.

Table 2: Mitcham District Centre Breakdown of Comparison Units

Type of Unit	Mitcham		% UK* Average
	Units	%	
Clothing and footwear	7	19.4	26.6
Furniture, carpets and textiles	3	8.3	8.9
Booksellers, arts, crafts and stationers	1	2.8	9.2
Electrical, gas, music and photography	4	11.1	9.6
DIY, hardware and homewares	5	13.9	6.8
China, glass, gifts and fancy goods	0	0.0	3.8
Cars, motorcycles and motor access.	1	2.8	3.1
Chemists, drug stores and opticians	8	22.2	9.2
Variety, department and catalogue	1	2.8	1.5
Florists, nurserymen and seedsmen	1	2.8	2.4
Toys, hobby, cycle and sport	0	0.0	5.1
Jewellers	0	0.0	5.0
Other comparison retailers	6	13.9	8.8
Total	**36**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
** UK average for all town centres surveyed by Goad Plans (June 2010).*

4.6 There are a limited number of national multiple comparison retailers within Mitcham, which includes Superdrug, Peacocks, and Boots the Chemist.

Service Uses

4.7 All GOAD categories within the Retail Service sector are provided for in Mitcham. The provision in most sectors is below the national average, apart from the proportion of hairdressers, beauty parlours and laundrettes and dry cleaners.

Table 3: Mitcham District Centre Analysis of Selected Service Uses

Type of Unit	Mitcham		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	23	40.4	44.4
Banks/other financial services	8	14.0	14.0
Estate agents/valuers	6	10.5	11.3
Travel agents	1	1.8	3.9
Hairdressers/beauty parlours	17	29.8	23.5
Laundries/dry cleaners	2	3.5	2.9
Total	**57**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)

** UK average for all town centres surveyed by Goad Plans (June 2010).*
N.B. 'Restaurants, cafés and takeaways' does not include drinking establishments in the centre.

4.8 There are a number of banks within the centre including Natwest, HSBC, Barclays, Lloyds TSB and Nationwide. There is also a good selection of restaurants, cafes and takeaways including a McDonalds, Greggs and KFC, in addition to a number of smaller independent retailers.

Vacant Units

4.9 There are 19 vacant units within the centre, which comprises 12.8% of all units. This is slightly above the national average at 12.5%. There is a cluster of vacant buildings along the pedestrianised stretch of London Road (which runs south of St Mark's Road).

Commercial Property Indicators

4.10 There is no published yield figures for Mitcham and there is an insufficient pool of recent transactions to establish the up to date average.

4.11 Valuation data suggests Zone A retail rental levels in Mitcham range from £180 to £300 per sq m. Prime rental levels are less than a fifth of those in Wimbledon town centre. Retail property values in Mitcham are likely to be a fraction of those in the primary area of Wimbledon town centre.

Catchment Area and Visitor Profile

4.12 The main reason that people visit Mitcham is for shopping for food products (56% of respondents to NEMS In Street Survey, November 2010). 20% of visitors went to Mitcham to use a service. 68% of visitors intended to buy food and groceries from the centre and 20% didn't plan to buy anything. 15% of those surveyed intended to spend approximately £5-10 and 15% intended to spend between £75-£100. This demonstrates that Mitcham is a location for both main and top up shopping. In terms of leisure facilities, over 55% intended to visit a restaurant or café in the centre. The majority of people spend between 16-30 minutes at the centre, closely followed by those intending to spend between 30 minutes to 1.5 hours. Most people visit the centre once a week.

Accessibility and Movement

4.13 There is no underground station or a mainline rail station within the centre boundary. However, the centre is relatively compact and accessible by bus and offers a good array of car parking provision. The centre is part pedestrianised which enhances pedestrian movement through the centre and there is a good provision of pedestrian crossing to connect the sections of the centre intersected by the main roads.

Car Parking

4.14 There are a number of car parks located in the middle of Mitcham centre. The largest car park is adjacent to the Morrisons Store, which provides over 300 car parking spaces. Also, in close proximity to Morrisons is a surface level car park with 100 spaces. Over half of the respondents (52%) surveyed by NEMS in November 2010 considered that the availability of parking was quite good, and over 40% travelled to the centre by car.

Public Transport

4.15 The PTAL rating for Mitcham District Centre is 4. This is fairly good, although considerably lower than the other major centres in the borough.

4.16 There is no rail or underground station located within the Primary Shopping Area of Mitcham. The closest station is Mitcham Eastfields Rail Station, which is located approximately 1 km to the east the centre. There are a number of bus stops located within the centre which provide regular services to nearby centres including Streatham, Tooting, Putney, and Clapham. These bus services help attract customers to the centre from surrounding residential areas. 50% of visitors to the centre considered that the bus service was quite good.

4.17 The nearest underground stations are Tooting Broadway (20 minute journey by bus) and Colliers Wood (a 30 minute walk). Mitcham tram stop and Mitcham Junction railway station are over fifteen minutes walk away from the town centre,

Traffic Congestion and Accessibility

4.18 Traffic flows were heavy through the centre at the time of our visit, especially along London Road and Western Road. As identified above, 40% of visitors travel to the centre by car which contributes to heavy traffic flows and 36% of visitors considered that traffic congestion through the centre is very poor.

Pedestrian Access and Movement

4.19 The heavy traffic flows cause obstruction to pedestrian movement, although there are a number of pedestrian crossings to ease pedestrian access through the centre. A stretch of London Road, to the east of Holborn Way, is pedestrianised and this significantly improves pedestrian access through the centre.

4.20 Pedestrian flows were heaviest at the time of our visit around the Majestic Way and the Morrisons Store. There were also high pedestrian flows outside the Lidl store. Towards the north of the centre flows were much lighter.

Environmental Quality

4.21 The environmental quality in Mitcham is mixed. The cluster of vacant units along the pedestrian section of the centre, along London Road, detracts from the environmental quality of the centre. Mitcham Upper Green enhances the quality of the centre and provides a focal point for the centre.

4.22 There is a mix of building styles in the centre. The terrace of retail units along Majestic way are a more modern style. This is in contrast to the terrace units along London Road which are more dated and in need of refurbishment. The old library located along London Road is a high quality building.

4.23 There are new developments located to the north of London Road and along Holborn way, and this helps enhance the quality of this part of the town centre.

4.24 Landscaping in the centre is sparse, apart from around the Upper Green, where there are trees and planters located.

Stakeholder Feedback

4.25 Feedback from stakeholders raised the following issues relating to Mitcham.

- MItcham is seen as one of the poorest centres in the Borough and the ability to improve it was questioned.
- There is a need to recognise the varying qualities of Mitcham town centre and the local catchment it serves. There is a definite end user for Mitcham.
- It is the hardest hit centre and its catchment include the hardest hit sectors of the population during the recent recession. There is a high level of unemployment in the area.
- Retailers are struggling in Mitcham.
- Moving forward there is a need to stimulate retail development to help long standing multiples stay.
- Council made a mistake to pedestrianise Mitcham in the 1980’s. This killed the town centre.
- Priority should be given to address the environmental quality of the centre and its public realm rather than provision for additional retail floorspace.
- Additional evening economy uses should be encouraged, such as restaurants.
- The quality of retail uses should be enhanced.
- Any development promoted in the centre needs to contribute to enhancing the public realm.

Summary of Mitcham’s Strengths and Weaknesses

Strengths

- The centre has a basic range of shops and services which serve day to day needs of local residents.

- The centre benefits from an adequate selection of convenience retail outlets, anchored by the Morrisons Supermarket and complemented by Lidl and Iceland, but lacks a superstore of over 2,500 sq.m.
- The centre has a green which provides a focal point of the centre, and is surrounded by pedestrianised streets which enhances pedestrian movement through the centre. Pavements are wide and of reasonable quality.
- The centre provides some community facilities including a library and advice centre.
- There are a number of bus routes which connect the centre with surrounding residential areas. The bus service was rated highly by occupiers.

Weaknesses

- Mitcham has a low number of comparison retailers and national multiple retailers. The quality of comparison retailers is low.
- There is no natural circuit for pedestrians, as a result of the layout of the centre. Upper Green Road which traverses the centre effectively cuts the centre in two and is a severe barrier to pedestrian movement. Traffic congestion was rated as ‘poor’ by a high proportion of those surveyed.
- Retail property values in Mitcham are a fraction of those in the primary area of Wimbledon town centre.
- A large number of facades in the centre are poorly maintained, which suggests a lack of investment in to the centre.

5.0
Colliers Wood

Introduction

5.1 Colliers Wood is located to the east of Wimbledon. The Council's intention is to designate Colliers Wood as a district centre following the adoption of a masterplan for the area. It has a reasonable number of retail and service uses and is spread over a relatively wide area. It is intended that Colliers Wood will be designated as a District Centre following the adoption of the masterplan proposals. Retail uses (Class A1 to A5) occupy 59,064 sq m gross (source: LB Merton land use survey and VOA). This figure includes Sainsburys, Marks & Spencer, Priory retail park, Tandem retail park and shop promises on Merton High Street, High Street Colliers Wood, and Christchurch Road. Colliers Wood currently does not function as a single centre and separate shopping areas are poorly linked. However, if all areas are taken together Colliers Wood is the second largest shopping destination in the Borough behind Wimbledon town centre.

5.2 Colliers Wood is characterised by a mix of areas, including Colliers Wood High Street, the parade of shops along Christchurch Road, the more modem Tandem Centre and Priory Retail Park and the Sainsburys and Marks & Spencer stores at Merton High Street.

Mix of Uses and Occupier Representation

5.3 Colliers Wood has 142 retail units. The proportion of units in Class A1 service and Class A3/A5 is comparable with the national average. The proportion of units in convenience retail use and in Class A2 is slightly above the national average.

Table 1 Colliers Wood Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average [1]
Comparison Retail	40	29.4	42.6
Convenience Retail	19	14.0	9.5
A1 Services [2]	16	11.8	11.6
A2 Services	17	12.5	8.6
A3 and A5	22	16.2	15.2
A4	6	N/A	N/A
Vacant	22	16.2	12.5
Total	**142**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
(1) UK average for all town centres surveyed by Goad Plans (June 2010).
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

Retailer Representation

5.4 The main convenience provision in the centre is the Sainsbury's superstore and the Marks & Spencer food hall at 1 Merton High Street. This is supported by smaller, more local convenience offer, including Tesco Express (petrol station) along Colliers Wood High Street and independent convenience retailers.

Table 2: Colliers Wood Breakdown of Comparison Units

Type of Unit	Colliers Wood		% UK*
	Units	%	Average
Clothing and footwear	5	12.5	26.6
Furniture, carpets and textiles	6	15.0	8.9
Booksellers, arts, crafts and stationers	1	2.5	9.2
Electrical, gas, music and photography	8	20.0	9.6
DIY, hardware and homewares	6	15.0	6.8
China, glass, gifts and fancy goods	1	2.5	3.8
Cars, motorcycles and motor access.	2	5.0	3.1
Chemists, drug stores and opticians	2	5.0	9.2
Variety, department and catalogue	3	7.5	1.5
Florists, nurserymen and seedsmen	0	0.0	2.4
Toys, hobby, cycle and sport	4	10.0	5.1
Jewellers	1	2.5	5.0
Other comparison retailers	1	2.5	8.8
Total	**40**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
** UK average for all town centres surveyed by Goad Plans (June 2010).*

5.5 There is a relatively good presence of national multiple comparison retailers within Colliers Wood, which includes Marks & Spencer, Next, WHSmith, TK Maxx, Boots and Mamas and Papas. The majority are located at the Tandem Centre. There are a number of 'bulky goods' operators located at Priory Retail Park including PC World, Currys and Mothercare.

Service Uses

5.6 There is a good range of service uses within Colliers Wood, with representation in all the GOAD categories. There is a higher than average proportion of restaurants, cafes and takeaways; estate agents; and laundrettes and dry cleaners in the centre. There are no banks in the centre and only two other financial services.

5.7 There is a good range of restaurants, cafes and takeaways within the centre, including Frankie and Bennys, Starbucks, Burger King and Nandos.

5.8 The centre also has a number of other 'non Class A' service uses including a Virgin Active Gym, Premier Inn and Holiday Inn Express hotels and a dentist.

Table 3: Colliers Wood Analysis of Selected Service Uses

Type of Unit	Colliers Wood		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	22	47.8	44.4
Banks/other financial services	2	4.3	14.0
Estate agents/valuers	9	19.6	11.3
Travel agents	1	2.2	3.9
Hairdressers/beauty parlours	10	21.7	23.5
Laundries/dry cleaners	2	4.3	2.9
Total	**46**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
** UK average for all town centres surveyed by Goad Plans (June 2010).*
N.B. 'Restaurants, cafés and takeaways' does not include drinking establishments in the centre.

Vacant Units

5.9 There are 22 vacant units within the centre, which comprises 15.5% of all units within the centre. This is higher than the national average, and higher than Morden and Wimbledon. There are no evident clusters of vacant buildings within the centre.

Commercial Property Indicators

5.10 There are no published zone A retail rent or yield figures for Colliers Wood and there is an insufficient pool of recent transactions to establish the up to date average.

5.11 Valuation data suggest Zone A retail rental levels in Colliers Wood range from £225 to £350 per sq m. Prime rental levels are less than a quarter of those in Wimbledon town centre. The retail parks have relatively healthy rental levels (£365 per sq m in Priory RP and £410 per sq m at the Tandem Centred – NB total rents not just Zone A),

Catchment Area and Visitor Profile

5.12 Most people visit Colliers Wood for non food goods in the first instance (38%, NEMS In Street Survey November 2010). 38% intend to buy clothing or footwear during their visit. This is followed by food and groceries (26%) and domestic and electrical products (15%). The amount people intend to spend money in Colliers Wood on both non food and food products varies, with 18% looking to spend between £50-£75 on non food goods during their visit. Over 20% will only spend 30 minutes in the centre, although 16% intended to spend 2-3 hours at Colliers Wood during their visit. 32% will visit the centre 2-3 times a week.

Accessibility and Movement

5.13 The centre is accessible by car, tube and bus. The centre is spread over several different areas which does not encourage linked trips to all areas of the centre. The peripheral areas along Colliers Wood High Street and to the west of

Merton High Street are located in areas which will not necessitate trips when visiting other, more core, areas of the centre.

Car Parking

5.14 Around a third of visitors to the centre travel by car (36% use public transport and 28% walk). The car parking provision in the centre is located outside the retail parks (Tandem Centre and Priority Retail Park) and the Sainsburys/ Marks & Spencer. 34% consider that the availability of car parking is very good, with nearly 40% confirming that the parking charges are also very good.

Public Transport

5.15 The public transport provision in Colliers Wood is good, and it has a PTAL rating of 6a. The Centre is served by an Underground Station (Northern Line) and a number of bus services providing services to surrounding residential areas, in addition to Tooting, Wimbledon and Mitcham.

Traffic Congestion and Accessibility

5.16 Traffic flow through the centre was heavy at the time of our site visit. This hindered pedestrian movement through the centre. The centre is spread over a broad area, which does not allow for a flow of visitors through the centre. Instead, due to the location of the main retail areas (Tandem Centre, Priory Retail Park and Marks & Spencer/Sainsburys) adjacent to the main car parking areas, the peripheral areas are considered to be relatively inaccessible resulting in their decline.

Pedestrian Access and Movement

5.17 The Centre is widely dispersed and based along a series of main roads. This prohibits pedestrian movement through the centre. Although there are number of pedestrian crossings through the centre, the separation of the Tandem Centre from Merton High Street obstructs movement through the centre.

5.18 Pedestrian flows are moderate throughout the centre, although notably busier around the Underground Station, the Tandem Centre and the Sainsburys and Marks & Spencer stores on Merton High Street. Colliers Wood is located on the Wandle Trail which connects Wandsworth to Carshaltan (Sutton).

Environmental Quality

5.19 The environmental quality within Colliers Wood is mixed. The building styles vary, with older style terraced buildings along Merton High Street and along Priory Road, complemented by more modern developments including Priory Retail Park, Tandem Centre and the Sainsburys/ Marks & Spencer. The retail park sheds, electricity pylons and the Brown and Root Tower dominate the centre and do not contribute to the areas envrionmental quality.

5.20 Wandle Park enhances the environmental quality of the centre, although it is located on the periphery and so is not necessarily a core function of the centre.

5.21 Over 70% of respondents to the NEMS In Street Survey considered that the general shopping environment is very good.

Stakeholder Feedback

5.22 Feedback from stakeholders raised the following issues relating to Colliers Wood.

- Due to its scale Colliers Wood is quite high up in the retail hierarchy.
- The centre is very fragmented and it is difficult for people to identify the retail core.
- There is a need to make the centre better connected.
- There is additional value to be created but this needs a developer with a deep pocket and a vision to take on an enormous task.
- Aim would be to create a “High Street” style centre.
- There are good links near South Wimbledon.
- There is a need to promote Colliers Wood as a town centre.
- The SW19 catchment generates plenty of money contained which should help to promote the centre and encourage economic development.
- Its fragmented nature is partly a result of it not being promoted as a District Centre to date. Development came about in an uncontrolled nature, and resisted by Council which has led to poor linkages.

Summary of Colliers Wood’s Strengths and Weaknesses

Strengths

- The centre provides a good range of retail units, and has a relatively high number of national multiple retailers.
- Accessibility to the centre is very good, with an underground station and a good bus services serving the centre. Car park facilities are rated highly by visitors to the centre.
- Wandle Park and the River Wandle provide attractive features to the centre.
- There is a good supply of alternative uses in the centre including hotels and a Virgin Active Gym.

Weaknesses

- The centre is widely dispersed, which does not encourage linked trips to all areas of the centre. The peripheral parts as a result are declining.

- There is a low proportion of certain retail service uses, such as banks, which means the centre is not fulfilling the day to day needs of local residents.
- Retail property values in Colliers Wood are a fraction of those in the primary area of Wimbledon town centre, but rental levels within the retail parks are reasonably strong for these types of premises.
- The retail sheds, pylons and Brown and Root Tower detract from the environmental quality of the area.

6.0 Raynes Park Local Centre

Introduction

6.1 Raynes Park local centre is located to the west of the Borough. The main shopping core is focused around Coombe Lane. Part of the centre is separated from the main core by the railway line. The centre predominantly serves a local catchment, meeting shoppers' day to day needs. Retail uses (Class A1 to A5) occupy 6,748 sq m gross (source: LB Merton land use survey and VOA), and Raynes Park is the seventh largest centre in the Borough, just behind North Mitcham local centre.

Mix of Uses and Occupier Representation

6.2 Raynes Park has a total of 76 retail/service uses (excluding non-retail Class A uses). The diversity of uses present in Raynes Park in terms of the number of units is set out in Table 1, compared against the national average.

Table 1 Raynes Park Local Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	19	26.4	42.6
Convenience Retail	10	13.9	9.5
A1 Services (2)	13	18.1	11.6
A2 Services	12	16.7	8.6
A3 and A5	11	15.3	15.2
A4	4	N/A	N/A
Vacant	7	9.7	12.5
Total	**76**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
(1) UK average for all town centres surveyed by Goad Plans (June 2010).
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

6.3 This split of uses is generally as expected for a centre of Raynes Park's size, with a higher proportion of convenience and A1 and A2 service uses and a much lower proportion of comparison shops, reflecting its role as a lower order centre meeting the day to day needs of its local population. The vacancy rate is lower than the national average.

Retailer Representation

6.4 In terms of convenience operators, Raynes Park contains a small Co-op store, supported by a number of smaller and independent convenience retailers. The convenience offer of the centre will be improved with the new Waitrose supermarket, which is due to open in February 2011 as part of the Trinity Place redevelopment.

6.5 Raynes Park has a limited selection on comparison shops, reflecting the centre's lower order shopping role.

Service Uses

6.6 Raynes Park has a good range of service uses to meet the day-to-day needs of residents, and the proportions of Class A1, A2, A3 and A5 services are similar to the national averages.

Vacant Units

6.7 There are seven vacant units throughout the centre, which equates to a vacancy rate of 9.7%, which is below the national average.

Commercial Property Indicators

6.8 There are no published yield figures for Raynes Park and there is an insufficient pool of recent transactions to establish the up to date average. Valuation data suggests Zone A retail rental levels are £400 per sq m, which is reasonable for a small centre.

Accessibility and Movement

6.9 Raynes Park is centred around the railway station, with train services to Wimbledon, London Waterloo, Clapham Junction, Guildford, Dorking, Chessington, Hampton Court, Shepperton and stations in between. Raynes Park is also served by a number of bus routes. The centre has a PTAL rating of 3 which is relatively good for a centre of its size.

6.10 Raynes Park does not currently have any dedicated shopper car parks within the centre, although parking will be provided as part of the 21-31 Coombe lane development. Pedestrian movement through the centre is hindered by the railway line, and the southern part of the centre is connected by passages beneath the railway.

Environmental Quality

6.11 The quality of the buildings in Raynes Park varies considerably. The western end of the centre includes an unattractive office block above the Co-op store and post office, which detracts from the quality of the centre. Part of the centre to the north is located within a Conservation Area. The railway line splits Raynes Park into two and dominates the centre.

6.12 There is a good provision of street furniture and bicycle stands which appear well used, particularly close to the railway station. Pavements throughout the centre are wide and generally in good condition. The pedestrian passages beneath the railway line are wide and well lit.

Summary of Raynes Park's Strengths and Weaknesses

Strengths

- Raynes Park is an important local centre which serves the day to day shopping needs of the local population.
- Given the size of the centre, the convenience and comparison offer is sufficient.
- The vacancy rate is lower than the national average.
- There is a good provision of street furniture, particularly bicycle stands.

Weaknesses

- The railway line running through the centre provides a physical and visual barrier between the two parts of the local centre.
- The quality of the buildings in the centre varies considerably, with some buildings detracting from the overall quality of the centre.

7.0 Wimbledon Village Local Centre

Introduction

7.1 Wimbledon Village is the largest local centre in the London Borough of Merton. The centre is predominantly linear, focused on the High Street. Wimbledon Village is entirely located within a Conservation Area and contains a number of listed and high quality buildings. The centre is upmarket and provides a good selection of top-end retailers. Retail uses (Class A1 to A5) occupy 13,051 sq m gross (source: LB Merton land use survey and VOA), and Wimbledon Village is the fifth largest centre in the Borough. It is the largest local centre and only slightly smaller than Mitcham and Morden.

Mix of Uses and Occupier Representation

7.2 Wimbledon Village has a total of 127 retail/service uses (excluding non-retail Class A uses). The diversity of uses present in Wimbledon Village in terms of the number of units is set out in Table 6.1, compared against the national average.

Table 1 Wimbledon Village Local Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average [1]
Comparison Retail	68	55.7	42.6
Convenience Retail	9	7.4	9.5
A1 Services [2]	11	9.0	11.6
A2 Services	15	12.3	8.6
A3 and A5	18	14.8	15.2
A4	5	N/A	N/A
Vacant	1	0.8	12.5
Total	**127**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
(1) UK average for all town centres surveyed by Goad Plans (June 2010).
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

7.3 For a local centre, Wimbledon Village has a good range of uses, with a particularly high proportion of comparison units compared to the national average. The vacancy rate is exceptionally low, with only one vacant unit in the defined centre.

Retailer Representation

7.4 Convenience goods representation in the centre comprises small units, the largest being the Tesco Express, measuring 205 sq.m net. Other convenience goods retailers include the upmarket grocer Bayley & Sage, two off licences, a fishmonger, butcher, baker, deli and newsagent.

7.5 Major national comparison retailers present in the centre include Bang & Olufsen, Carphone Warehouse, Cath Kidston, Jigsaw, Joules, LK Bennett, Max Mara, Molton Brown, Reiss, Space NK Apothecary and Whistles. This representation of high quality shops is a key difference between Wimbledon Village and other local centres in the Borough. One would not normally expect to find this mix of uses within a local centre.

Service Uses

7.6 Wimbledon Village provides a good range of service uses. The proportion of restaurants/cafes/takeaways in the centre is comparable with the national average. The centre has a number of good quality restaurants, whereas other local centres have a predominance of takeaways. The proportion of A2 services such as banks and estate agents is slightly higher than the national average. There are also riding stables in the centre which also helps to attract customers.

Vacant Units

7.7 There is only one vacant unit in the centre, which results in the exceptionally low vacancy rate of just 0.8%.

Commercial Property Indicators

7.8 There are no published yield figures for Wimbledon Village and there is an insufficient pool of recent transactions to establish the up to date average. Valuation data suggests prime Zone A retail rental levels are 1,300 per sq m, which is high for a small centre.

Accessibility and Movement

7.9 The centre is easily accessible by public transport and relatively compact. The centre is linear, focused around the High Street. Wimbledon Village is served by a number of bus routes, with bus stops located along the High Street and Ridgeway. Wimbledon train station is located approximately 600 m to the south east of the local centre. The centre has a PTAL rating of 1b which is relatively low for a centre of its size.

7.10 Wimbledon Village does not have any dedicated car parks. On-street parking is provided throughout the centre. The High Street is a relatively busy main road and this can result in some congestion in the centre. The high levels of traffic along the High Street can cause some obstruction to pedestrian movement throughout the centre, however regular pedestrian crossings are provided throughout the centre. The centre is compact and easy to navigate by pedestrians.

Environmental Quality

7.11 The overall environment of Wimbledon Village local centre is very good. The conservation area status given to the centre ensures that any development must seek to preserve or enhance the character or appearance of the centre.

7.12 The centre is easy to navigate with good and clear signage to assist visitors. The cleanliness of the centre is very good with sufficient provision of planting, litter bins and street furniture.

Stakeholder Feedback

7.13 Feedback from stakeholders raised the following issues relating to Wimbledon Village.

- There are no opportunities for significant development within the centre as available land/ development opportunities is scarce.
- The centre appears to be extremely healthy but this has been described as a “superficial gloss”. Many of the tenants within the centre are struggling.
- Business rates are too high. These are linked to value and property prices in Wimbledon Village are very high. This means commercial pressures.
- Wimbledon Village is trying to encourage a local centre with niche high quality independent retailers but such retailers are being pushed out because of land values. As a result independent retailers are declining and national multiples increasing. Loosing village feel.
- The impression is that national multiple retailers are only present in the Village in order to advertise rather than contributing to the viability of the centre.
- Parking is a problem because there are no areas to park. TfL Strategy and LB Merton should include parking provision in its strategy for Wimbledon Village.

Summary of Wimbledon Village’s Strengths and Weaknesses

Strengths

- The centre provides a good range of shops and services, particularly high end comparison goods retailers;
- The centre has a very attractive shopping environment;
- The centre has an exceptionally low vacancy rate with just one vacant unit.
- Retail rental levels are buoyant for a centre of its size.

Weaknesses

- The lack of car parks and relatively busy route through the centre can cause some congestion.

8.0 Motspur Park Local Centre

Introduction

8.1 Motspur Park is a small local centre located to the south west of the Borough. Motspur Park is a compact centre, with the railway line forming the western boundary of the centre. Retail uses (Class A1 to A5) occupy 1,462 sq m gross (source: LB Merton land use survey and VOA). It is the ninth largest centre in the Borough, but the smallest designated local centre.

Mix of Uses and Occupier Representation

8.2 Motspur Park has a total of 26 retail/service uses (excluding non-retail Class A uses). The diversity of uses present in Motspur Park in terms of the number of units is set out in Table 1, compared against the national average.

Table 1 Motspur Park Local Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	6	24.0	42.6
Convenience Retail	5	20.0	9.5
A1 Services (2)	4	16.0	11.6
A2 Services	2	8.0	8.6
A3 and A5	6	24.0	15.2
A4	1	N/A	N/A
Vacant	2	8.0	12.5
Total	**26**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
(1) UK average for all town centres surveyed by Goad Plans (June 2010).
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

8.3 This split of uses is generally as expected for a centre of Motspur Park's size, with a higher than average proportion of Class A3/A5 uses and convenience shops and a lower than average proportion of comparison shops, reflecting its role as a lower order centre meeting the day to day needs of its local population. The vacancy rate is lower than the national average.

Retailer Representation

8.4 Although Motspur Park has a higher than average representation of convenience goods retailers, there are no national multiples present in the centre, and the convenience offer comprises a general store, two grocers, a butcher and newsagent.

8.5 The comparison offer in the centre is limited, and again no national multiples are represented.

Service Uses

8.6 Motspur Park has a high proportion of Class A3 and A5 uses, including four take away outlets. The Earl Beatty pub forms the focal point of the local centre. The centre also contains a range of services including a dry cleaners, barber, hair dressers, post office and a library.

Vacant Units

8.7 Motspur Park contains just two vacant units, and the vacancy rate at 8.0% is lower than the national average.

Commercial Property Indicators

8.8 There are no published yield figures for Motspur Park and there is an insufficient pool of recent transactions to establish the up to date average. Valuation data suggests Zone A retail rental levels are £289 per sq m, which is relatively low compared with other local centres in the Borough.

Accessibility and Movement

8.9 Motspur Park is served by a railway station, with train services to Wimbledon, London Waterloo, Clapham Junction, Guildford, Dorking, Chessington and stations in between. The centre has a PTAL rating of 1b which is relatively low, but generally expected for a centre of its size.

8.10 There are no car parks serving the centre. On-street parking is provided throughout the centre, and Station Road is particularly busy with cars parked both sides of the road. West Barnes Lane running through the centre is a busy road, and pedestrian crossings are provided.

Environmental Quality

8.11 The overall environment of Motspur Park is generally good. Buildings are relatively small scale and no more than three storeys tall throughout. There is a good provision of street furniture throughout the centre, including bicycle stands, and planting is evident to improve the attractiveness of the centre.

Summary of Motspur Park's Strengths and Weaknesses

Strengths

- Motspur Park provides a good range of services to meet local needs, including a dry cleaners, barber, hair dressers, post office, library and Class A3 and A5 units.
- Motspur Park has a low vacancy rate, with just two vacant units in the centre.
- The overall environment of Motspur Park is generally good.

Weaknesses

- Given its small scale, Motspur Park has only a limited retail offer and residents need to travel further afield to meet day to day shopping needs.
- The lack of parking provision can cause the centre to feel congested.
- Retail rental levels are relatively low.

9.0 North Mitcham Local Centre

Introduction

9.1 North Mitcham is located to the north east of the Borough, approximately 1 km to the north of Mitcham district centre and 1 km to the east of Colliers Wood. It is a linear centre focused along London Road, stretching a distance of approximately 400 metres. The centre is characterised by terraced units and primarily services the day-to-day shopping and service needs of local residents. Retail uses (Class A1 to A5) occupy 7,099 sq m gross (source: LB Merton land use survey and VOA). It is the sixth largest centre in the Borough and the second largest local centre behind Wimbledon Village.

Mix of Uses and Occupier Representation

9.2 The centre has 52 commercial units. The diversity of uses present in North Mitcham on the basis of the number of units is shown in Table 1. This is derived from the Council's Land Use survey (2010).

Table 1 North Mitcham Local Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	11	21.6	42.6
Convenience Retail	9	17.6	9.5
A1 Services (2)	7	13.7	11.6
A2 Services	7	13.7	8.6
A3 and A5	9	17.6	15.2
A4	1	N/A	N/A
Vacant	8	15.7	12.5
Total	**52**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
(1) UK average for all town centres surveyed by Goad Plans (June 2010).
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

9.3 The mix of uses is similar to those typically found in a local centre. The proportion of comparison retailers is more than 20% below the national average, whilst the proportion of convenience retail is approximately 8% higher.

Retailer Representation

9.4 The Lidl store provides the main convenience retail offer in the centre. There are also a number of other small independent convenience stores spread throughout the centre.

9.5 There are eight comparison retail units which is a reasonable selection for a centre of this size.

Service Uses

9.6 North Mitcham has a higher proportion of units in retail service use than the national average, with the largest number being in Class A3 or A5 use.

Vacant Units

9.7 There are vacant units within the centre, which amounts to 15.4% of all units. This is higher than the national average of 12.5%. The majority of the vacant units are spread throughout the centre, although there is a cluster towards the south of the centre at 50-62 London Road. The proportion of vacant units is 3% higher than the national average.

Commercial Property Indicators

9.8 There are no published yield figures for North Mitcham and there is an insufficient pool of recent transactions to establish the up to date average. Valuation data suggests Zone A retail rental levels are £250 per sq m, which is relatively low compared with other local centres in the Borough.

Accessibility and Movement

9.9 The centre is easily accessible by public transport and relatively compact. The centre is linear, focused around London Road (A217) which is a red route into London.

9.10 North Mitcham benefits from one car park at the Lidl store, which is located at the heart of the centre. There is some limited on street car parking along London Road and on adjoining residential streets.

9.11 North Mitcham is served by Tooting rail station, which is situated in the heart of the centre. This provides rail services between Central London and Sutton, serving stations including Tulse Hill and Streatham. Cycle stands are provided at the station. The centre has a PTAL rating of 4 which is relatively good for a centre of its size. London Road is well served by bus services.

9.12 London Road is a busy main road and this results in high congestion levels through the centre. The high levels of traffic along London Road obstructs pedestrian movement throughout the centre, except at the designated pedestrian crossings. The centre is easy to navigate by pedestrians.

Environmental Quality

9.13 This linear centre is characterised by a mix of building styles. Victorian terrace units, with the lower floors in commercial use and upper floors occupied by residential units is the predominant building style, although the 1960s police station and the modern Lidl unit add variety to the architectural quality.

9.14 The pavements are wide, which aids pedestrian movement, and they were free of litter at the time of our visit. The pavements are in reasonable condition and are relatively clean. There are some bins located sporadically through the centre, although the centre could benefit from enhanced provision. There is very little sign of graffiti through the centre. Whilst there are signs of recent tree planting through the centre, the centre would benefit from enhanced landscaping features to increase its attractiveness.

Summary of North Mitcham's Strengths and Weaknesses

Strengths

- Good selection of retail units to provide for the day to day needs of local residents.
- The accessibility of the centre is good, with Tooting rail station located at the centre's heart, and a good bus service provided along London Road. Residential streets stem from the centre, and given the local function of the centre it is expected that the majority of visitors to the centre walk.

Weaknesses

- A number of facades fronting onto London Road are in need of refurbishment.
- The vacancy rate is higher than the national average which suggests that the centre is in relative decline.
- Retail rental levels are relatively low.

10.0
Arthur Road Local Centre

Introduction

10.1 Arthur Road is a small local centre located to the north of the Borough. The centre is linear, focused on Arthur Road. Retail uses (Class A1 to A5) occupy 2,766 sq m gross (source: LB Merton land use survey and VOA), and it is the eight largest centre in the Borough. It is the smallest local centre a part from Motspur Park.

Mix of Uses and Occupier Representation

10.2 Arthur Road local centre has a total of 37 retail/service uses (excluding non-retail Class A uses). The diversity of uses present in Arthur Road in terms of the number of units is set out in Table 1, compared against the national average.

Table 1 Arthur Road Local Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	6	16.2	42.6
Convenience Retail	6	16.2	9.5
A1 Services (2)	8	21.6	11.6
A2 Services	3	8.1	8.6
A3 and A5	9	24.3	15.2
A4	1	N/A	N/A
Vacant	5	13.5	12.5
Total	**38**	**100.0**	**100.0**

Source: Merton Council town centre floorspace data (2010)
(1) UK average for all town centres surveyed by Goad Plans (June 2010).
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

10.3 This split of uses is generally as expected for a centre of Arthur Road's size, with a higher proportion of convenience shops and A1 services, with a much lower proportion of comparison shops, reflecting its role as a lower order centre meeting the day to day needs of its local population. The vacancy rate is slightly higher than the national average.

Retailer Representation

10.4 Arthur Road has a higher than average representation of convenience goods retailers, and the main offer is provided by a Co-op supermarket. Other convenience retailers comprise a baker, butcher, general convenience store, newsagent and off licence.

10.5 The comparison offer in the centre is limited, and no national multiples are represented.

Service Uses

10.6 Arthur Road has a relatively high proportion of Class A3 and A5 uses, including five take away outlets and four cafés/restaurants and a sandwich bar. The centre also contains a range of services including two dry cleaners, two barbers, two hairdressers and a post office. The Woodman Pub is located within the local centre boundary, but is separate from the main core of the centre on Durnsford Road.

Vacant Units

10.7 Arthur Road contains just five vacant units, which makes the vacancy rate slightly higher than the national average. Some renovation work in the centre may be partly the cause of the level of vacant units.

Commercial Property Indicators

10.8 There are no published yield figures for Arthur Road and there is an insufficient pool of recent transactions to establish the up to date average. Valuation data suggests Zone A retail rental levels are £550 per sq m, which is relatively high compared with other local centres in the Borough.

10.9 Accessibility and Movement

10.10 Arthur Road local centre is highly accessible by public transport. Wimbledon Park underground station is located within the centre, which is on the District Line, linking the centre to Wimbledon and connects to Earls Court, Westminster, Victoria and other central London locations. The number 156 bus which serves Wimbledon, Clapham Junction and Vauxhall stops on Durnsford Road. The centre has a PTAL rating of 3 which is good for a centre of its size.

10.11 There are no car parks serving the centre. On-street parking is provided throughout the centre. Arthur Road is a relatively busy road, and a pedestrian crossing is provided opposite the underground station.

Environmental Quality

10.12 The overall environment of Arthur Road local centre is very good. Buildings are generally in a good state of repair and are attractive. There is a vacant site at the junction of Arthur Road and The Crescent which is currently being redeveloped to provide community and office uses, which should add to the overall attractiveness of the centre.

10.13 The centre is easy to navigate and the cleanliness of the centre is very good with sufficient provision of planting, litter bins and street furniture including bicycle stands.

Summary of Arthur Road's Strengths and Weaknesses

Strengths

- Arthur Road local centre serves the day to day shopping needs of the local population.
- Given the size of the centre, the convenience offer is sufficient, in particular the provision of the Co-op supermarket.
- The overall environment of Arthur Road local centre is very good.
- Retail rental levels are relatively strong in the centre.

Weaknesses

- Arthur Road has a vacancy rate of 13.5%, which is above the national average.
- The lack of parking provision can cause the centre to feel congested.

11.0 Street Markets

11.1 There are four main markets in the London Borough of Merton, supplementing the retail offer within the main town, district and local centres.

Wimbledon Market, Plough Lane

11.2 Wimbledon Market is a privately owned market and is held every Sunday from 9 am to around 3 pm in the car park adjacent to Wimbledon Stadium. The market sells fresh goods including fruit, vegetables and meat, and general household items, plus other goods such as plants, clothing, luggage and stationery. The market contains about 80 stalls in total. Outdoor tables and chairs are also provided for customers purchasing fast food from stalls and vans. Wimbledon Market caters for value and bargain shoppers.

11.3 At the time of visiting, the market was busy. The majority of visitors appear to have travelled to the market by car, with the car parking areas relatively full. The nearest underground station to the market is Wimbledon Park Station (1.1km) and Haydons Road Rail Station is approximately 900m walk from the market.

Suggested improvements

11.4 The market is a busy and popular destination but is scruffy in appearance. Improvements that could be made by the owner include the provision of bins, planting and signage, although this may not be practical as the market is within the stadium car park and not permanent pitches. If this site were to be redeveloped in the future, an area should be designated to accommodate the market. The Council should also encourage more customers to travel to the market by public transport, as the roads around the market become congested.

Mitcham Market

11.5 Mitcham Market is located in the centre of Mitcham on a fully pedestrianised area of Fair Green, which is located near the Clock Tower - an iconic landmark in Mitcham. The market is held Monday to Saturday.

11.6 The market has adopted a "one stall rule" which means that the aim is to have no more than one stall selling the same type of goods. The range of goods sold from the market include fruit and vegetables, pet supplies, plants and flowers, household goods, clothing and mobile phone accessories.

11.7 The location in the centre of Mitcham makes the market accessible to shoppers by public transport, particularly by bus.

11.8 While the stalls appeared busy, there was only a limited number of stalls present at the time of visit – around ten stalls selling fruit and vegetables, pet supplies, household goods and stationery.

Suggested improvements

11.9 The location of the market in the central of Mitcham is good, but does not appear to be attracting many traders. There is potential to accommodate future growth if demand for pitches increases in the future.

Morden Market

11.10 Morden Market was located on Abbotsbury Road, with 12 pitches available for occupation. The market has not operated for a number of years. The market was held on Wednesday, Friday and Saturday. At the time of this report the area is undergoing resurfacing work following investment from TfL. The overall appearance of the area will be improved and new power units will be installed to enable traders to work in differing conditions. Morden has historically a poorly attended market with traders citing parking restrictions, lack of amenities and poor location.

11.11 The market is in a highly accessible location close to Morden underground station and bus stops, but is separated from the main retail core of Morden, and feels in a secondary location.

Suggested improvements

11.12 If the market is reinstated and exceeds the 12 pitches available then the presence of the road and parked cars between the pitches is likely to affect the cohesion of the market and impact on the shopping experience. It may therefore be worth the Council considering whether Abbotsbury Road could be pedestrianised on market days.

Merton Abbey Mills

11.13 A craft market is held at Merton Abbey Mills every Saturday and Sunday between 10 am and 5 pm, and an antique and collectors market is held on Thursday mornings.

11.14 The market is in an attractive setting next to the River Wandle and is held around the Merton Abbey Mills buildings, a number of which are listed buildings and have been converted to other uses such as restaurants. Events including childrens activities and live music are frequently held within the market.

11.15 Stalls in the craft market are free, with the requirement that the art and craft products should be original creations and handmade. Rental charges apply to "non handmade" stalls. There is a maximum of around 100 stalls. The market appeared popular and busy on the day of our visit, although not all stalls were in use.

11.16 The market is accessible by public transport, close to Colliers Wood Tube station and is served by a number of bus routes. There is a car park adjacent to the market with up to two hours free parking.

Suggested improvements

11.17 Improvements could be made to signage to the market, particularly for pedestrians from Merantum Way, to encourage more visitors to travel to the market on foot or by public transport.

Conclusions

11.18 The size and functions of markets in the Borough vary. The markets provide an important role in providing value for customers, and together they have a reasonably diverse selection of goods.

11.19 There appears to be spare capacity for more stalls in most of the markets, and there is scope to accommodate future growth. This spare capacity seems to be a current weakness. The markets would benefit from environmental improvements.

Appendix 4 Convenience Assessment

Table 1B : Population Projections

Catchment Area	2001	2010	2013	2016	2021	2026
1 - Wimbledon West	28,342	29,842	30,278	30,652	31,314	31,847
2 - East Wimbledon/Colliers	43,809	45,389	45,841	46,251	46,758	47,307
3 - Raynes Park & East Kingston	43,080	44,642	45,113	45,556	46,116	46,693
4 - North Sutton	46,857	48,353	48,791	49,178	49,679	50,257
5 - Tooting	55,823	60,404	61,748	62,852	65,290	66,942
6 - Mitcham	53,877	55,821	56,376	56,880	57,504	58,179
7 - Streatham	38,204	40,472	41,219	41,932	42,887	43,932
8 - Balham/Clapham	48,912	52,937	54,200	55,316	57,357	59,033
9 - Wandsworth	42,617	46,114	47,414	48,262	50,134	51,402
	401,521	**423,974**	**430,980**	**436,879**	**447,039**	**455,592**

Sources: *2001 Census Population (obtained from Experian for postcode areas)*
GLA Demographic Projections 2009 Projections Round - Revised August 2010

Table 2B: Convenience Goods Expenditure Per Capita (2009 Prices)

Expenditure Per Capita	2010	2013	2016	2021	2026	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
1 - Wimbledon West	£2,060	£2,064	£2,086	£2,134	£2,181	1.3%	3.6%	5.9%
2 - East Wimbledon/Colliers Wood	£1,942	£1,946	£1,967	£2,012	£2,056	1.3%	3.6%	5.9%
3 - Raynes Park/East Kingston	£1,977	£1,981	£2,002	£2,048	£2,093	1.3%	3.6%	5.9%
4 - North Sutton	£1,760	£1,763	£1,782	£1,823	£1,863	1.3%	3.6%	5.9%
5 - Tooting	£1,727	£1,730	£1,749	£1,789	£1,828	1.3%	3.6%	5.8%
6 - Mitcham	£1,713	£1,715	£1,734	£1,774	£1,813	1.2%	3.6%	5.8%
7 - Streatham	£1,762	£1,765	£1,784	£1,825	£1,865	1.2%	3.6%	5.8%
8 - Balham/Clapham	£1,803	£1,806	£1,826	£1,868	£1,909	1.3%	3.6%	5.9%
9 -Wandsworth	£1,830	£1,833	£1,853	£1,896	£1,938	1.3%	3.6%	5.9%

Sources:
Experian local estimates of 2009 convenience goods expenditure per capita
Excluding special forms of trading.
Experian Business Strategies - forecast annual growth rates up to 2012.
Experian Business Strategies - ultra long term growth rate adopted beyond 2012 (0.5% per annum).

Table 3B: Total Available Convenience Goods Expenditure (£M - 2009 Prices)

Catchment Area	2010	2013	2016	2021	2026	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
1 - Wimbledon West	£61.47	£62.49	£63.94	£66.82	£69.46	4.0%	8.7%	13.0%
2 - East Wimbledon/Colliers Wood	£88.15	£89.21	£90.98	£94.08	£97.26	3.2%	6.7%	10.3%
3 - Raynes Park/ East Kingston	£88.26	£89.37	£91.20	£94.45	£97.73	3.3%	7.0%	10.7%
4 - North Sutton	£85.10	£86.02	£87.64	£90.56	£93.63	3.0%	6.4%	10.0%
5 - Tooting	£104.32	£106.82	£109.93	£116.80	£122.37	5.4%	12.0%	17.3%
6 - Mitcham	£95.62	£96.68	£98.63	£102.01	£105.48	3.1%	6.7%	10.3%
7 - Streatham	£71.31	£72.75	£74.81	£78.27	£81.93	4.9%	9.8%	14.9%
8 - Balham/Clapham	£95.45	£97.89	£101.01	£107.14	£112.69	5.8%	12.3%	18.1%
9 - Wandsworth	£84.39	£86.91	£89.43	£95.05	£99.62	6.0%	12.6%	18.0%
Total	**£774.06**	**£788.14**	**£807.56**	**£845.19**	**£880.17**	**4.3%**	**9.2%**	**13.7%**

Sources: *Table 1B and Table 2B*

Table 4B: **Convenience Shopping Penetration Rates 2010**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow
Wimbledon	48%	37%	22%	2%	2%	3%	1%	0%	13%	5%
Mitcham	0%	0%	0%	1%	5%	48%	3%	0%	1%	5%
Morden	3%	4%	3%	25%	1%	3%	0%	0%	0%	5%
Colliers Wood	6%	39%	9%	5%	12%	19%	7%	1%	5%	5%
Raynes Park	2%	0%	16%	3%	0%	0%	0%	0%	0%	5%
Tesco Extra, New Malden	18%	7%	25%	8%	2%	0%	0%	0%	2%	20%
LB Merton Sub-Total	**77%**	**87%**	**75%**	**44%**	**22%**	**73%**	**11%**	**1%**	**21%**	**n/a**
Other in the Study Area	11%	8%	15%	19%	67%	7%	74%	72%	64%	n/a
Expenditure Outflow	**12%**	**5%**	**10%**	**37%**	**11%**	**20%**	**15%**	**27%**	**15%**	**n/a**
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Source: *NEMS household surveys 2010*

Table 5B: **Convenience Expenditure 2010 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expend
Expenditure 2010	**£61.47**	**£88.15**	**£88.26**	**£85.10**	**£104.32**	**£95.62**	**£71.31**	**£95.45**	**£84.39**	**n/a**	
Wimbledon	£29.51	£32.61	£19.42	£1.70	£2.09	£2.87	£0.71	£0.00	£10.97	£5.26	**£105.14**
Mitcham	£0.00	£0.00	£0.00	£0.85	£5.22	£45.90	£2.14	£0.00	£0.84	£2.89	**£57.84**
Morden	£1.84	£3.53	£2.65	£21.28	£1.04	£2.87	£0.00	£0.00	£0.00	£1.75	**£34.95**
Colliers Wood	£3.69	£34.38	£7.94	£4.26	£12.52	£18.17	£4.99	£0.95	£4.22	£4.80	**£95.91**
Raynes Park	£1.23	£0.00	£14.12	£2.55	£0.00	£0.00	£0.00	£0.00	£0.00	£0.94	**£18.85**
Tesco Extra, New Malden	£11.07	£6.17	£22.06	£6.81	£2.09	£0.00	£0.00	£0.00	£1.69	£12.47	**£62.35**
LB Merton Sub-Total	**£47.34**	**£76.69**	**£66.19**	**£37.44**	**£22.95**	**£69.80**	**£7.84**	**£0.95**	**£17.72**	**£28.10**	**£375.04**
Other in Study Area	£6.76	£7.05	£13.24	£16.17	£69.89	£6.69	£52.77	£68.72	£54.01	n/a	**£295.31**
Expenditure Outflow	**£7.38**	**£4.41**	**£8.83**	**£31.49**	**£11.47**	**£19.12**	**£10.70**	**£25.77**	**£12.66**	**n/a**	**£131.82**
Total	**£61.47**	**£88.15**	**£88.26**	**£85.10**	**£104.32**	**£95.62**	**£71.31**	**£95.45**	**£84.39**	**n/a**	

Sources: Table 3B and 4B

Table 6B: Future Convenience Shopping Penetration Rates 2013 onwards

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow
Wimbledon	50%	40%	22%	2%	2%	3%	1%	0%	14%	5%
Mitcham	0%	0%	0%	1%	5%	46%	3%	0%	1%	5%
Morden	3%	4%	3%	25%	1%	3%	0%	0%	0%	5%
Colliers Wood	5%	36%	9%	5%	10%	18%	6%	1%	5%	5%
Raynes Park	3%	0%	20%	4%	0%	0%	0%	0%	0%	5%
Tesco Extra, New Malden	17%	7%	23%	7%	2%	0%	0%	0%	2%	20%
LB Merton Sub-Total	**78%**	**87%**	**77%**	**44%**	**20%**	**70%**	**10%**	**1%**	**22%**	**n/a**
Other in the Study Area	10%	8%	13%	19%	65%	7%	55%	69%	63%	n/a
Tesco, Streatham (proposed)	0%	0%	0%	0%	5%	3%	25%	5%	0%	n/a
Expenditure Outflow	**12%**	**5%**	**10%**	**37%**	**10%**	**20%**	**10%**	**25%**	**15%**	**n/a**
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Source: *NEMS household surveys 2010 with NLP adjustments*

Table 7B: **Future Convenience Penetration Rates 2021 onwards (with extended Morden store)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow
Wimbledon	50%	40%	22%	1%	2%	3%	1%	0%	14%	5%
Mitcham	0%	0%	0%	0%	5%	45%	3%	0%	1%	5%
Morden	3%	5%	4%	38%	1%	4%	0%	0%	0%	5%
Colliers Wood	5%	35%	9%	4%	10%	18%	6%	1%	5%	5%
Raynes Park	3%	0%	20%	3%	0%	0%	0%	0%	0%	5%
Tesco Extra, New Malden	17%	7%	22%	6%	2%	0%	0%	0%	2%	20%
LB Merton Sub-Total	**78%**	**87%**	**77%**	**52%**	**20%**	**70%**	**10%**	**1%**	**22%**	**n/a**
Other in the Study Area	10%	8%	13%	17%	65%	7%	55%	69%	63%	n/a
Tesco, Streatham (proposed)	0%	0%	0%	0%	5%	3%	25%	5%	0%	n/a
Expenditure Outflow	**12%**	**5%**	**10%**	**31%**	**10%**	**20%**	**10%**	**25%**	**15%**	**n/a**
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Source: *NEMS household surveys 2010 with NLP adjustments*

Table 8B: **Convenience Expenditure 2013 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expend
Expenditure 2013	**£62.49**	**£89.21**	**£89.37**	**£86.02**	**£106.82**	**£96.68**	**£72.75**	**£97.89**	**£86.91**	**n/a**	
Wimbledon	£31.25	£35.68	£19.66	£1.72	£2.14	£2.90	£0.73	£0.00	£12.17	£5.59	**£111.83**
Mitcham	£0.00	£0.00	£0.00	£0.86	£5.34	£44.48	£2.18	£0.00	£0.87	£2.83	**£56.56**
Morden	£1.87	£3.57	£2.68	£21.50	£1.07	£2.90	£0.00	£0.00	£0.00	£1.77	**£35.37**
Colliers Wood	£3.12	£32.11	£8.04	£4.30	£10.68	£17.40	£4.37	£0.98	£4.35	£4.49	**£89.85**
Raynes Park	£1.87	£0.00	£17.87	£3.44	£0.00	£0.00	£0.00	£0.00	£0.00	£1.22	**£24.41**
Tesco Extra, New Malden	£10.62	£6.24	£20.55	£6.02	£2.14	£0.00	£0.00	£0.00	£1.74	£11.83	**£59.15**
LB Merton Sub-Total	**£48.75**	**£77.61**	**£68.81**	**£37.85**	**£21.36**	**£67.68**	**£7.28**	**£0.98**	**£19.12**	**£27.73**	**£377.17**
Other in Study Area	£6.25	£7.14	£11.62	£16.34	£69.44	£6.77	£40.01	£67.54	£54.75	n/a	**£279.86**
Tesco, Streatham (proposed)	£0.00	£0.00	£0.00	£0.00	£5.34	£2.90	£18.19	£4.89	£0.00	n/a	**£31.32**
Expenditure Outflow	**£7.50**	**£4.46**	**£8.94**	**£31.83**	**£11.75**	**£19.34**	**£10.91**	**£26.43**	**£13.04**	**n/a**	**£134.19**
Total	**£62.49**	**£89.21**	**£89.37**	**£86.02**	**£102.55**	**£93.78**	**£58.20**	**£94.95**	**£86.91**	**n/a**	

Sources: Table 3B and 6B

Table 9B: **Convenience Expenditure 2016 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expend
Expenditure 2016	**£63.94**	**£90.98**	**£91.20**	**£87.64**	**£109.93**	**£98.63**	**£74.81**	**£101.01**	**£89.43**	**n/a**	
Wimbledon	£31.97	£36.39	£20.06	£1.75	£2.20	£2.96	£0.75	£0.00	£12.52	£5.72	**£114.32**
Mitcham	£0.00	£0.00	£0.00	£0.88	£5.50	£45.37	£2.24	£0.00	£0.89	£2.89	**£57.77**
Morden	£1.92	£3.64	£2.74	£21.91	£1.10	£2.96	£0.00	£0.00	£0.00	£1.80	**£36.06**
Colliers Wood	£3.20	£32.75	£8.21	£4.38	£10.99	£17.75	£4.49	£1.01	£4.47	£4.59	**£91.85**
Raynes Park	£1.92	£0.00	£18.24	£3.51	£0.00	£0.00	£0.00	£0.00	£0.00	£1.25	**£24.91**
Tesco Extra, New Malden	£10.87	£6.37	£20.98	£6.13	£2.20	£0.00	£0.00	£0.00	£1.79	£12.08	**£60.42**
LB Merton Sub-Total	**£49.87**	**£79.15**	**£70.23**	**£38.56**	**£21.99**	**£69.04**	**£7.48**	**£1.01**	**£19.67**	**£28.33**	**£385.33**
Other in Study Area	£6.39	£7.28	£11.86	£16.65	£71.45	£6.90	£41.14	£69.69	£56.34	n/a	**£287.72**
Tesco, Streatham (proposed)	£0.00	£0.00	£0.00	£0.00	£5.50	£2.96	£18.70	£5.05	£0.00	n/a	**£32.21**
Expenditure Outflow	**£7.67**	**£4.55**	**£9.12**	**£32.43**	**£12.09**	**£19.73**	**£11.22**	**£27.27**	**£13.41**	**n/a**	**£137.49**
Total	**£63.94**	**£90.98**	**£91.20**	**£87.64**	**£105.53**	**£95.67**	**£59.85**	**£97.98**	**£89.43**	**n/a**	

Sources: Table 3B and 6B

Table 10B: **Convenience Expenditure 2021 £Million (baseline market shares)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expend
Expenditure 2021	**£66.82**	**£94.08**	**£94.45**	**£90.56**	**£116.80**	**£102.01**	**£78.27**	**£107.14**	**£95.05**	**n/a**	
Wimbledon	£33.41	£37.63	£20.78	£1.81	£2.34	£3.06	£0.78	£0.00	£13.31	£5.95	**£119.07**
Mitcham	£0.00	£0.00	£0.00	£0.91	£5.84	£46.93	£2.35	£0.00	£0.95	£3.00	**£59.97**
Morden	£2.00	£3.76	£2.83	£22.64	£1.17	£3.06	£0.00	£0.00	£0.00	£1.87	**£37.34**
Colliers Wood	£3.34	£33.87	£8.50	£4.53	£11.68	£18.36	£4.70	£1.07	£4.75	£4.78	**£95.58**
Raynes Park	£2.00	£0.00	£18.89	£3.62	£0.00	£0.00	£0.00	£0.00	£0.00	£1.29	**£25.81**
Tesco Extra, New Malden	£11.36	£6.59	£21.72	£6.34	£2.34	£0.00	£0.00	£0.00	£1.90	£12.56	**£62.81**
LB Merton Sub-Total	**£52.12**	**£81.85**	**£72.72**	**£39.85**	**£23.36**	**£71.41**	**£7.83**	**£1.07**	**£20.91**	**£29.45**	**£400.57**
Other in Study Area	£6.68	£7.53	£12.28	£17.21	£75.92	£7.14	£43.05	£73.93	£59.88	n/a	**£303.62**
Tesco, Streatham (proposed)	£0.00	£0.00	£0.00	£0.00	£5.84	£3.06	£19.57	£5.36	£0.00	n/a	**£33.82**
Expenditure Outflow	**£8.02**	**£4.70**	**£9.44**	**£33.51**	**£12.85**	**£20.40**	**£11.74**	**£28.93**	**£14.26**	**n/a**	**£143.85**
Total	**£66.82**	**£94.08**	**£94.45**	**£90.56**	**£112.13**	**£98.95**	**£62.62**	**£103.93**	**£95.05**	**n/a**	

Sources: Table 3B and 6B

Table 11B: **Convenience Expenditure 2021 £Million (with extended Morden store)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expend
Expenditure 2021	**£66.82**	**£94.08**	**£94.45**	**£90.56**	**£116.80**	**£102.01**	**£78.27**	**£107.14**	**£95.05**	**n/a**	
Wimbledon	£33.41	£37.63	£20.78	£0.91	£2.34	£3.06	£0.78	£0.00	£13.31	£5.91	**£118.12**
Mitcham	£0.00	£0.00	£0.00	£0.00	£5.84	£45.91	£2.35	£0.00	£0.95	£2.90	**£57.94**
Morden	£2.00	£4.70	£3.78	£34.41	£1.17	£4.08	£0.00	£0.00	£0.00	£2.64	**£52.79**
Colliers Wood	£3.34	£32.93	£8.50	£3.62	£11.68	£18.36	£4.70	£1.07	£4.75	£4.68	**£93.64**
Raynes Park	£2.00	£0.00	£18.89	£2.72	£0.00	£0.00	£0.00	£0.00	£0.00	£1.24	**£24.85**
Tesco Extra, New Malden	£11.36	£6.59	£20.78	£5.43	£2.34	£0.00	£0.00	£0.00	£1.90	£12.10	**£60.49**
LB Merton Sub-Total	**£52.12**	**£81.85**	**£72.72**	**£47.09**	**£23.36**	**£71.41**	**£7.83**	**£1.07**	**£20.91**	**£29.47**	**£407.83**
Other in Study Area	£6.68	£7.53	£12.28	£15.40	£75.92	£7.14	£43.05	£73.93	£59.88	n/a	**£301.81**
Tesco, Streatham (proposed)	£0.00	£0.00	£0.00	£0.00	£5.84	£3.06	£19.57	£5.36	£0.00	n/a	**£33.82**
Expenditure Outflow	**£8.02**	**£4.70**	**£9.44**	**£33.51**	**£12.85**	**£20.40**	**£11.74**	**£28.93**	**£14.26**	**n/a**	**£143.85**
Total	**£66.82**	**£94.08**	**£94.45**	**£96.00**	**£112.13**	**£98.95**	**£62.62**	**£103.93**	**£95.05**	**n/a**	

Sources: Table 3B and 7B

Table 12B: Convenience Expenditure 2026 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expend
Expenditure 2026	**£69.46**	**£97.26**	**£97.73**	**£93.63**	**£122.37**	**£105.48**	**£81.93**	**£112.69**	**£99.62**	**n/a**	
Wimbledon	£34.73	£38.91	£21.50	£1.87	£2.45	£3.16	£0.82	£0.00	£13.95	£6.18	**£123.56**
Mitcham	£0.00	£0.00	£0.00	£0.94	£6.12	£48.52	£2.46	£0.00	£1.00	£3.11	**£62.14**
Morden	£2.08	£3.89	£2.93	£23.41	£1.22	£3.16	£0.00	£0.00	£0.00	£1.93	**£38.63**
Colliers Wood	£3.47	£35.01	£8.80	£4.68	£12.24	£18.99	£4.92	£1.13	£4.98	£4.96	**£99.17**
Raynes Park	£2.08	£0.00	£19.55	£3.75	£0.00	£0.00	£0.00	£0.00	£0.00	£1.34	**£26.71**
Tesco Extra, New Malden	£11.81	£6.81	£22.48	£6.55	£2.45	£0.00	£0.00	£0.00	£1.99	£13.02	**£65.11**
LB Merton Sub-Total	**£54.18**	**£84.62**	**£75.25**	**£41.20**	**£24.47**	**£73.83**	**£8.19**	**£1.13**	**£21.92**	**£30.53**	**£415.32**
Other in Study Area	£6.95	£7.78	£12.70	£17.79	£79.54	£7.38	£45.06	£77.76	£62.76	n/a	**£317.73**
Tesco, Streatham (proposed)	£0.00	£0.00	£0.00	£0.00	£6.12	£3.16	£20.48	£5.63	£0.00	n/a	**£35.40**
Expenditure Outflow	**£8.33**	**£4.86**	**£9.77**	**£34.64**	**£13.46**	**£21.10**	**£12.29**	**£30.43**	**£14.94**	**n/a**	**£149.83**
Total	**£69.46**	**£97.26**	**£97.73**	**£93.63**	**£117.48**	**£102.31**	**£65.55**	**£109.31**	**£99.62**	**n/a**	

Sources: Table 3B and 6B

Table 13B: **Convenience Expenditure 2026 £Million (with extended Morden store)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expend
Expenditure 2026	**£69.46**	**£97.26**	**£97.73**	**£93.63**	**£122.37**	**£105.48**	**£81.93**	**£112.69**	**£99.62**	**n/a**	
Wimbledon	£34.73	£38.91	£21.50	£0.94	£2.45	£3.16	£0.82	£0.00	£13.95	£6.13	**£122.58**
Mitcham	£0.00	£0.00	£0.00	£0.00	£6.12	£47.47	£2.46	£0.00	£1.00	£3.00	**£60.04**
Morden	£2.08	£4.86	£3.91	£35.58	£1.22	£4.22	£0.00	£0.00	£0.00	£2.73	**£54.61**
Colliers Wood	£3.47	£34.04	£8.80	£3.75	£12.24	£18.99	£4.92	£1.13	£4.98	£4.86	**£97.16**
Raynes Park	£2.08	£0.00	£19.55	£2.81	£0.00	£0.00	£0.00	£0.00	£0.00	£1.29	**£25.72**
Tesco Extra, New Malden	£11.81	£6.81	£21.50	£5.62	£2.45	£0.00	£0.00	£0.00	£1.99	£12.54	**£62.72**
LB Merton Sub-Total	**£54.18**	**£84.62**	**£75.25**	**£48.69**	**£24.47**	**£73.83**	**£8.19**	**£1.13**	**£21.92**	**£30.55**	**£422.83**
Other in Study Area	£6.95	£7.78	£12.70	£15.92	£79.54	£7.38	£45.06	£77.76	£62.76	n/a	**£315.85**
Tesco, Streatham (proposed)	£0.00	£0.00	£0.00	£0.00	£6.12	£3.16	£20.48	£5.63	£0.00	n/a	**£35.40**
Expenditure Outflow	**£8.33**	**£4.86**	**£9.77**	**£34.64**	**£13.46**	**£21.10**	**£12.29**	**£30.43**	**£14.94**	**n/a**	**£149.83**
Total	**£69.46**	**£97.26**	**£97.73**	**£99.25**	**£117.48**	**£102.31**	**£65.55**	**£109.31**	**£99.62**	**n/a**	

Sources: Table 3B and 7B

Table 14B: Convenience Floorspace Capacity (£Million)

Centre/Facilities	2010	2013	2016	2021	2026
Available Expenditure in Merton					
Wimbledon	£105.14	£111.83	£114.32	£119.07	£123.56
Mitcham	£57.84	£56.56	£57.77	£59.97	£62.14
Morden	£34.95	£35.37	£36.06	£37.34	£38.63
Colliers Wood	£95.91	£89.85	£91.85	£95.58	£99.17
Raynes Park	£18.85	£24.41	£24.91	£25.81	£26.71
Tesco Extra, New Malden	£62.35	£59.15	£60.42	£62.81	£65.11
Total	**£375.04**	**£377.17**	**£385.33**	**£400.57**	**£415.32**
Benchmark Turnover of Existing/Proposed Facilities					
Wimbledon (incl. proposed new Waitrose at 2013)	£88.30	£105.44	£105.44	£105.44	£105.44
Mitcham	£53.97	£53.97	£53.97	£53.97	£53.97
Morden	£35.85	£35.85	£35.85	£35.85	£35.85
Colliers Wood	£78.26	£78.26	£78.26	£78.26	£78.26
Raynes Park (incl. proposed Waitrose at 2013)	£13.66	£24.97	£24.97	£24.97	£24.97
Tesco Extra, New Malden	£60.64	£60.64	£60.64	£60.64	£60.64
Total	**£330.68**	**£359.13**	**£359.13**	**£359.13**	**£359.13**
Surplus Expenditure					
Wimbledon	£16.84	£6.39	£8.88	£13.63	£18.12
Mitcham	£3.87	£2.59	£3.80	£6.00	£8.17
Morden	-£0.90	-£0.48	£0.21	£1.49	£2.78
Colliers Wood	£17.65	£11.59	£13.59	£17.32	£20.91
Raynes Park	£5.19	-£0.56	-£0.06	£0.84	£1.74
Tesco Extra, New Malden	£1.71	-£1.49	-£0.22	£2.17	£4.47
Total	**£44.36**	**£18.04**	**£26.20**	**£41.44**	**£56.19**
Turnover Density for New Floorspace £ per Sq M	£8,986	£8,986	£8,986	£8,986	£8,986
Sales Floorspace (Sq M Net)					
Wimbledon	1,874	712	988	1,517	2,017
Mitcham	431	288	423	668	909
Morden	-100	-54	24	166	310
Colliers Wood	1,964	1,290	1,512	1,927	2,327
Raynes Park	577	-62	-7	93	194
Tesco Extra, New Malden	191	-166	-24	241	497
Total	**4,936**	**2,007**	**2,916**	**4,612**	**6,253**
Gross Floorspace (Sq M)					
Wimbledon	2,882	1,095	1,520	2,334	3,103
Mitcham	663	443	650	1,027	1,398
Morden	-154	-83	37	255	476
Colliers Wood	3,022	1,984	2,326	2,965	3,580
Raynes Park	888	-96	-10	143	298
Tesco Extra, New Malden	293	-255	-38	371	765
Total	**7,594**	**3,088**	**4,486**	**7,095**	**9,620**

Sources: Tables 1A, 2A and Tables 5B to 12B

Table 15B: Convenience Floorspace Capacity (£Million) - (with extended Morden food Store)

Centre/Facilities	2010	2013	2016	2021	2026
Available Expenditure in Merton					
Wimbledon	£105.14	£111.83	£114.32	£118.12	£122.58
Mitcham	£57.84	£56.56	£57.77	£57.94	£60.04
Morden	£34.95	£35.37	£36.06	£52.79	£54.61
Colliers Wood	£95.91	£89.85	£91.85	£93.64	£97.16
Raynes Park	£18.85	£24.41	£24.91	£24.85	£25.72
Tesco Extra, New Malden	£62.35	£59.15	£60.42	£60.49	£62.72
Total	**£375.04**	**£377.17**	**£385.33**	**£407.83**	**£422.83**
Benchmark Turnover of Existing/Proposed Facilities					
Wimbledon (incl. proposed new Waitrose at 2013)	£88.30	£105.44	£105.44	£105.44	£105.44
Mitcham	£53.97	£53.97	£53.97	£53.97	£53.97
Morden (incl. extended Sainsbury store at 2021)	£35.85	£35.85	£35.85	£54.39	£54.39
Colliers Wood	£78.26	£78.26	£78.26	£78.26	£78.26
Raynes Park (incl. proposed Waitrose at 2013)	£13.66	£24.97	£24.97	£24.97	£24.97
Tesco Extra, New Malden	£60.64	£60.64	£60.64	£60.64	£60.64
Total	**£330.68**	**£359.13**	**£359.13**	**£377.67**	**£377.67**
Surplus Expenditure					
Wimbledon	£16.84	£6.39	£8.88	£12.68	£17.14
Mitcham	£3.87	£2.59	£3.80	£3.97	£6.07
Morden	-£0.90	-£0.48	£0.21	-£1.60	£0.22
Colliers Wood	£17.65	£11.59	£13.59	£15.38	£18.90
Raynes Park	£5.19	-£0.56	-£0.06	-£0.12	£0.75
Tesco Extra, New Malden	£1.71	-£1.49	-£0.22	-£0.15	£2.08
Total	**£44.36**	**£18.04**	**£26.20**	**£30.16**	**£45.16**
Turnover Density for New Floorspace £ per Sq M	£8,986	£8,986	£8,986	£8,986	£8,986
Sales Floorspace (Sq M Net)					
Wimbledon	1,874	712	988	1,411	1,907
Mitcham	431	288	423	442	675
Morden	-100	-54	24	-178	24
Colliers Wood	1,964	1,290	1,512	1,711	2,103
Raynes Park	577	-62	-7	-13	84
Tesco Extra, New Malden	191	-166	-24	-16	231
Total	**4,936**	**2,007**	**2,916**	**3,357**	**5,025**
Gross Floorspace (Sq M)					
Wimbledon	2,882	1,095	1,520	2,171	2,934
Mitcham	663	443	650	680	1,039
Morden	-154	-83	37	-274	37
Colliers Wood	3,022	1,984	2,326	2,632	3,236
Raynes Park	888	-96	-10	-20	129
Tesco Extra, New Malden	293	-255	-38	-25	356
Total	**7,594**	**3,088**	**4,486**	**5,164**	**7,731**

Sources: Tables 1A, 2A and Tables 5B to 13B

Appendix 5 Comparison Assessment

Table 1C: Comparison Goods Expenditure Per Capita (2009 Prices)

Expenditure Per Capita	2010	2013	2016	2021	2026	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
1 - Wimbledon West	£3,278	£3,506	£4,010	£5,057	£6,377	22.3%	54.3%	94.5%
2 - East Wimbledon/Colliers Wood	£3,071	£3,285	£3,757	£4,738	£5,974	22.3%	54.3%	94.5%
3 - Raynes Park/East Kingston	£3,066	£3,279	£3,751	£4,729	£5,963	22.3%	54.2%	94.5%
4 - North Sutton	£2,530	£2,706	£3,095	£3,903	£4,921	22.3%	54.3%	94.5%
5 - Tooting	£2,692	£2,879	£3,293	£4,153	£5,237	22.3%	54.3%	94.5%
6 - Mitcham	£2,433	£2,602	£2,976	£3,753	£4,733	22.3%	54.3%	94.5%
7 - Streatham	£2,669	£2,855	£3,265	£4,118	£5,192	22.3%	54.3%	94.5%
8 - Balham/ Clapham	£2,871	£3,070	£3,512	£4,428	£5,584	22.3%	54.2%	94.5%
9 - Wandsworth	£2,910	£3,112	£3,560	£4,489	£5,661	22.3%	54.3%	94.5%

Sources:

Experian local estimates for 2009 comparison goods expenditure per capita

Excluding special forms of trading.

Experian Business Strategies - recommended forecast growth rates up to 2012

Experian Business Strategies - ultra long term growth projection after 2012 (4.7%)

Table 2C: Total Available Comparison Goods Expenditure (£M - 2009 Prices)

Catchment Area	2010	2013	2016	2021	2026	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
1 - Wimbledon West	£97.82	£106.15	£122.91	£158.35	£203.09	25.7%	61.9%	107.6%
2 - East Wimbledon/Colliers Wood	£139.39	£150.59	£173.77	£221.54	£282.61	24.7%	58.9%	102.7%
3 - Raynes Park/ East Kingston	£136.87	£147.93	£170.88	£218.08	£278.43	24.8%	59.3%	103.4%
4 - North Sutton	£122.33	£132.03	£152.21	£193.90	£247.31	24.4%	58.5%	102.2%
5 - Tooting	£162.61	£177.77	£206.97	£271.15	£350.58	27.3%	66.8%	115.6%
6 - Mitcham	£135.81	£146.69	£169.27	£215.81	£275.36	24.6%	58.9%	102.8%
7- Streatham	£108.02	£117.68	£136.91	£176.61	£228.09	26.7%	63.5%	111.2%
8 - Balham/Clapham	£151.98	£166.39	£194.27	£253.98	£329.64	27.8%	67.1%	116.9%
9 - Wandsworth	£134.19	£147.55	£171.81	£225.05	£290.99	28.0%	67.7%	116.8%
Total	**£1,189.03**	**£1,292.79**	**£1,499.00**	**£1,934.47**	**£2,486.10**	**26.1%**	**62.7%**	**109.1%**

Sources: *Table 1B and Table 1C*

Table 3C: Comparison Shopping Penetration Rates and Available Expenditure 2010

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total
Expenditure 2010	**£97.82**	**£139.39**	**£136.87**	**£122.33**	**£162.61**	**£135.81**	**£108.02**	**£151.98**	**£134.19**	**n/a**	**£1,189.03**
Market Share											
Wimbledon	45%	44%	32%	9%	14%	9%	4%	5%	18%	15%	
Mitcham	0%	1%	0%	0%	2%	12%	1%	0%	0%	5%	
Morden	1%	2%	2%	5%	1%	2%	1%	0%	0%	20%	
Colliers Wood	4%	14%	2%	9%	11%	15%	9%	4%	6%	25%	
Raynes Park	1%	1%	4%	1%	0%	0%	0%	0%	0%	15%	
Shannon Corner	3%	3%	3%	3%	1%	0%	0%	0%	0%	50%	
Borough Area Total	**54%**	**65%**	**43%**	**27%**	**29%**	**38%**	**15%**	**9%**	**24%**	**n/a**	
Wandsworth	5%	1%	1%	0%	10%	1%	3%	12%	31%	n/a	
Other in Rest of Study Area	4%	4%	14%	4%	18%	5%	26%	25%	4%	n/a	
Rest of Study Area Total	**9%**	**5%**	**15%**	**4%**	**28%**	**6%**	**29%**	**37%**	**35%**	**n/a**	
Croydon	3%	4%	2%	8%	8%	26%	30%	7%	3%	n/a	
Kingston	20%	15%	30%	11%	5%	4%	3%	3%	12%	n/a	
Central London/West End	7%	7%	6%	2%	18%	3%	13%	22%	14%	n/a	
Other Outflow	7%	4%	4%	48%	12%	23%	10%	22%	12%	n/a	
Outflow Total	**37%**	**30%**	**42%**	**69%**	**43%**	**56%**	**56%**	**54%**	**41%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
Turnover £M											
Wimbledon	£44.02	£61.33	£43.80	£11.01	£22.77	£12.22	£4.32	£7.60	£24.15	£40.80	£272.03
Mitcham	£0.00	£1.39	£0.00	£0.00	£3.25	£16.30	£1.08	£0.00	£0.00	£1.16	£23.18
Morden	£0.98	£2.79	£2.74	£6.12	£1.63	£2.72	£1.08	£0.00	£0.00	£4.51	£22.55
Colliers Wood	£3.91	£19.51	£2.74	£11.01	£17.89	£20.37	£9.72	£6.08	£8.05	£33.10	£132.38
Raynes Park	£0.98	£1.39	£5.47	£1.22	£0.00	£0.00	£0.00	£0.00	£0.00	£1.60	£10.67
Shannon Corner	£2.93	£4.18	£4.11	£3.67	£1.63	£0.00	£0.00	£0.00	£0.00	£16.52	£33.04
Borough Area Total	**£52.82**	**£90.60**	**£58.86**	**£33.03**	**£47.16**	**£51.61**	**£16.20**	**£13.68**	**£32.21**	**£97.69**	**£493.85**
Wandsworth	£4.89	£1.39	£1.37	£0.00	£16.26	£1.36	£3.24	£18.24	£41.60	n/a	£88.35
Other in Rest of Study Area	£3.91	£5.58	£19.16	£4.89	£29.27	£6.79	£28.09	£38.00	£5.37	n/a	£141.05
Rest of Study Area Total	**£8.80**	**£6.97**	**£20.53**	**£4.89**	**£45.53**	**£8.15**	**£31.33**	**£56.23**	**£46.97**	**n/a**	**£229.40**
Croydon	£2.93	£5.58	£2.74	£9.79	£13.01	£35.31	£32.41	£10.64	£4.03	n/a	£116.42
Kingston	£19.56	£20.91	£41.06	£13.46	£8.13	£5.43	£3.24	£4.56	£16.10	n/a	£132.46
Central London/West End	£6.85	£9.76	£8.21	£2.45	£29.27	£4.07	£14.04	£33.44	£18.79	n/a	£126.87
Other Outflow	£6.85	£5.58	£5.47	£58.72	£19.51	£31.24	£10.80	£33.44	£16.10	n/a	£187.71
Outflow Total	**£36.19**	**£41.82**	**£57.49**	**£84.41**	**£69.92**	**£76.05**	**£60.49**	**£82.07**	**£55.02**	**n/a**	**£563.46**
TOTAL	**£97.82**	**£139.39**	**£136.87**	**£122.33**	**£162.61**	**£135.81**	**£108.02**	**£151.98**	**£134.19**	**n/a**	**n/a**

Sources: *Table 2C NEMS Household Surveys 2009*

Table 4C: Comparison Shopping Penetration Rates and Available Expenditure 2013

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total
Expenditure 2013	**£106.15**	**£150.59**	**£147.93**	**£132.03**	**£177.77**	**£146.69**	**£117.68**	**£166.39**	**£147.55**	**n/a**	**£1,292.79**
Market Share											
Wimbledon	45%	44%	32%	9%	14%	9%	4%	5%	18%	15%	
Mitcham	0%	1%	0%	0%	2%	12%	1%	0%	0%	5%	
Morden	1%	2%	2%	5%	1%	2%	1%	0%	0%	20%	
Colliers Wood	4%	14%	2%	9%	11%	15%	9%	4%	6%	25%	
Raynes Park	1%	1%	4%	1%	0%	0%	0%	0%	0%	15%	
Shannon Corner	3%	3%	3%	3%	1%	0%	0%	0%	0%	49%	
Borough Area Total	**54%**	**65%**	**43%**	**27%**	**29%**	**38%**	**15%**	**9%**	**24%**	**n/a**	
Wandsworth	5%	1%	1%	0%	10%	1%	3%	12%	31%	n/a	
Other in Rest of Study Area	4%	4%	14%	4%	18%	5%	26%	25%	4%	n/a	
Rest of Study Area Total	**9%**	**5%**	**15%**	**4%**	**28%**	**6%**	**29%**	**37%**	**35%**	**n/a**	
Croydon	3%	4%	2%	8%	8%	26%	30%	7%	3%	n/a	
Kingston	20%	15%	30%	11%	5%	4%	3%	3%	12%	n/a	
Central London/West End	7%	7%	6%	2%	18%	3%	13%	22%	14%	n/a	
Other Outflow	7%	4%	4%	48%	12%	23%	10%	22%	12%	n/a	
Outflow Total	**37%**	**30%**	**42%**	**69%**	**43%**	**56%**	**56%**	**54%**	**41%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
Turnover £M											
Wimbledon	£47.77	£66.26	£47.34	£11.88	£24.89	£13.20	£4.71	£8.32	£26.56	£44.28	£295.20
Mitcham	£0.00	£1.51	£0.00	£0.00	£3.56	£17.60	£1.18	£0.00	£0.00	£1.25	£25.10
Morden	£1.06	£3.01	£2.96	£6.60	£1.78	£2.93	£1.18	£0.00	£0.00	£4.88	£24.40
Colliers Wood	£4.25	£21.08	£2.96	£11.88	£19.55	£22.00	£10.59	£6.66	£8.85	£35.94	£143.77
Raynes Park	£1.06	£1.51	£5.92	£1.32	£0.00	£0.00	£0.00	£0.00	£0.00	£1.73	£11.53
Shannon Corner	£3.18	£4.52	£4.44	£3.96	£1.78	£0.00	£0.00	£0.00	£0.00	£17.18	£35.06
Borough Area Total	**£57.32**	**£97.88**	**£63.61**	**£35.65**	**£51.55**	**£55.74**	**£17.65**	**£14.98**	**£35.41**	**£105.27**	**£535.06**
Wandsworth	£5.31	£1.51	£1.48	£0.00	£17.78	£1.47	£3.53	£19.97	£45.74	n/a	£96.78
Other in Rest of Study Area	£4.25	£6.02	£20.71	£5.28	£32.00	£7.33	£30.60	£41.60	£5.90	n/a	£153.69
Rest of Study Area Total	**£9.55**	**£7.53**	**£22.19**	**£5.28**	**£49.78**	**£8.80**	**£34.13**	**£61.57**	**£51.64**	**n/a**	**£250.47**
Croydon	£3.18	£6.02	£2.96	£10.56	£14.22	£38.14	£35.30	£11.65	£4.43	n/a	£126.47
Kingston	£21.23	£22.59	£44.38	£14.52	£8.89	£5.87	£3.53	£4.99	£17.71	n/a	£143.70
Central London/West End	£7.43	£10.54	£8.88	£2.64	£32.00	£4.40	£15.30	£36.61	£20.66	n/a	£138.45
Other Outflow	£7.43	£6.02	£5.92	£63.37	£21.33	£33.74	£11.77	£36.61	£17.71	n/a	£203.90
Outflow Total	**£39.28**	**£45.18**	**£62.13**	**£91.10**	**£76.44**	**£82.15**	**£65.90**	**£89.85**	**£60.50**	**n/a**	**£612.52**
TOTAL	**£106.15**	**£150.59**	**£147.93**	**£132.03**	**£177.77**	**£146.69**	**£117.68**	**£166.39**	**£147.55**	**n/a**	**n/a**

Sources: *Table 2C NEMS Household Surveys 2009*

Table 5C: **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	% Inflow	Total
Expenditure 2016	**£122.91**	**£173.77**	**£170.88**	**£152.21**	**£206.97**	**£169.27**	**£136.91**	**£194.27**	**£171.81**	**n/a**	**£1,499.00**
Market Share											
Wimbledon	45%	44%	32%	9%	14%	9%	4%	5%	18%	15%	
Mitcham	0%	1%	0%	0%	2%	12%	1%	0%	0%	5%	
Morden	1%	2%	2%	5%	1%	2%	1%	0%	0%	20%	
Colliers Wood	4%	14%	2%	9%	11%	15%	9%	4%	6%	25%	
Raynes Park	1%	1%	4%	1%	0%	0%	0%	0%	0%	15%	
Shannon Corner	3%	3%	3%	3%	1%	0%	0%	0%	0%	46%	
Borough Area Total	**54%**	**65%**	**43%**	**27%**	**29%**	**38%**	**15%**	**9%**	**24%**	**n/a**	
Wandsworth	5%	1%	1%	0%	10%	1%	3%	12%	31%	n/a	
Other in Rest of Study Area	4%	4%	14%	4%	18%	5%	26%	25%	4%	n/a	
Rest of Study Area Total	**9%**	**5%**	**15%**	**4%**	**28%**	**6%**	**29%**	**37%**	**35%**	**n/a**	
Croydon	3%	4%	2%	8%	8%	26%	30%	7%	3%	n/a	
Kingston	20%	15%	30%	11%	5%	4%	3%	3%	12%	n/a	
Central London/West End	7%	7%	6%	2%	18%	3%	13%	22%	14%	n/a	
Other Outflow	7%	4%	4%	48%	12%	23%	10%	22%	12%	n/a	
Outflow Total	**37%**	**30%**	**42%**	**69%**	**43%**	**56%**	**56%**	**54%**	**41%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
Turnover £M											
Wimbledon	£55.31	£76.46	£54.68	£13.70	£28.98	£15.23	£5.48	£9.71	£30.93	£51.26	£341.74
Mitcham	£0.00	£1.74	£0.00	£0.00	£4.14	£20.31	£1.37	£0.00	£0.00	£1.45	£29.01
Morden	£1.23	£3.48	£3.42	£7.61	£2.07	£3.39	£1.37	£0.00	£0.00	£5.64	£28.20
Colliers Wood	£4.92	£24.33	£3.42	£13.70	£22.77	£25.39	£12.32	£7.77	£10.31	£41.64	£166.56
Raynes Park	£1.23	£1.74	£6.84	£1.52	£0.00	£0.00	£0.00	£0.00	£0.00	£2.00	£13.32
Shannon Corner	£3.69	£5.21	£5.13	£4.57	£2.07	£0.00	£0.00	£0.00	£0.00	£17.60	£38.26
Borough Area Total	**£66.37**	**£112.95**	**£73.48**	**£41.10**	**£60.02**	**£64.32**	**£20.54**	**£17.48**	**£41.24**	**£119.59**	**£617.09**
Wandsworth	£6.15	£1.74	£1.71	£0.00	£20.70	£1.69	£4.11	£23.31	£53.26	n/a	£112.66
Other in Rest of Study Area	£4.92	£6.95	£23.92	£6.09	£37.25	£8.46	£35.60	£48.57	£6.87	n/a	£178.63
Rest of Study Area Total	**£11.06**	**£8.69**	**£25.63**	**£6.09**	**£57.95**	**£10.16**	**£39.70**	**£71.88**	**£60.13**	**n/a**	**£291.30**
Croydon	£3.69	£6.95	£3.42	£12.18	£16.56	£44.01	£41.07	£13.60	£5.15	n/a	£146.63
Kingston	£24.58	£26.06	£51.26	£16.74	£10.35	£6.77	£4.11	£5.83	£20.62	n/a	£166.33
Central London/West End	£8.60	£12.16	£10.25	£3.04	£37.25	£5.08	£17.80	£42.74	£24.05	n/a	£160.99
Other Outflow	£8.60	£6.95	£6.84	£73.06	£24.84	£38.93	£13.69	£42.74	£20.62	n/a	£236.27
Outflow Total	**£45.48**	**£52.13**	**£71.77**	**£105.02**	**£89.00**	**£94.79**	**£76.67**	**£104.91**	**£70.44**	**n/a**	**£710.21**
TOTAL	**£122.91**	**£173.77**	**£170.88**	**£152.21**	**£206.97**	**£169.27**	**£136.91**	**£194.27**	**£171.81**	**n/a**	**n/a**

Sources: *Table 2C NEMS Household Surveys 2009*

Table 6C: **Comparison Shopping Penetration Rates and Available Expenditure 2021 (constant shares)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total
Expenditure 2021	**£158.35**	**£221.54**	**£218.08**	**£193.90**	**£271.15**	**£215.81**	**£176.61**	**£253.98**	**£225.05**	**n/a**	**£1,934.47**
Market Share											
Wimbledon	45%	44%	32%	9%	14%	9%	4%	5%	18%	15%	
Mitcham	0%	1%	0%	0%	2%	12%	1%	0%	0%	5%	
Morden	1%	2%	2%	5%	1%	2%	1%	0%	0%	20%	
Colliers Wood	4%	14%	2%	9%	11%	15%	9%	4%	6%	25%	
Raynes Park	1%	1%	4%	1%	0%	0%	0%	0%	0%	15%	
Shannon Corner	3%	3%	3%	3%	1%	0%	0%	0%	0%	40%	
Borough Area Total	**54%**	**65%**	**43%**	**27%**	**29%**	**38%**	**15%**	**9%**	**24%**	**n/a**	
Wandsworth	5%	1%	1%	0%	10%	1%	3%	12%	31%	n/a	
Other in Rest of Study Area	4%	4%	14%	4%	18%	5%	26%	25%	4%	n/a	
Rest of Study Area Total	**9%**	**5%**	**15%**	**4%**	**28%**	**6%**	**29%**	**37%**	**35%**	**n/a**	
Croydon	3%	4%	2%	8%	8%	26%	30%	7%	3%	n/a	
Kingston	20%	15%	30%	11%	5%	4%	3%	3%	12%	n/a	
Central London/West End	7%	7%	6%	2%	18%	3%	13%	22%	14%	n/a	
Other Outflow	7%	4%	4%	48%	12%	23%	10%	22%	12%	n/a	
Outflow Total	**37%**	**30%**	**42%**	**69%**	**43%**	**56%**	**56%**	**54%**	**41%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
Turnover £M											
Wimbledon	£71.26	£97.48	£69.79	£17.45	£37.96	£19.42	£7.06	£12.70	£40.51	£65.93	£439.57
Mitcham	£0.00	£2.22	£0.00	£0.00	£5.42	£25.90	£1.77	£0.00	£0.00	£1.86	£37.16
Morden	£1.58	£4.43	£4.36	£9.69	£2.71	£4.32	£1.77	£0.00	£0.00	£7.22	£36.08
Colliers Wood	£6.33	£31.02	£4.36	£17.45	£29.83	£32.37	£15.89	£10.16	£13.50	£53.64	£214.56
Raynes Park	£1.58	£2.22	£8.72	£1.94	£0.00	£0.00	£0.00	£0.00	£0.00	£2.55	£17.01
Shannon Corner	£4.75	£6.65	£6.54	£5.82	£2.71	£0.00	£0.00	£0.00	£0.00	£17.65	£44.11
Borough Area Total	**£85.51**	**£144.00**	**£93.78**	**£52.35**	**£78.63**	**£82.01**	**£26.49**	**£22.86**	**£54.01**	**£148.85**	**£788.49**
Wandsworth	£7.92	£2.22	£2.18	£0.00	£27.11	£2.16	£5.30	£30.48	£69.77	n/a	£147.13
Other in Rest of Study Area	£6.33	£8.86	£30.53	£7.76	£48.81	£10.79	£45.92	£63.49	£9.00	n/a	£231.50
Rest of Study Area Total	**£14.25**	**£11.08**	**£32.71**	**£7.76**	**£75.92**	**£12.95**	**£51.22**	**£93.97**	**£78.77**	**n/a**	**£378.62**
Croydon	£4.75	£8.86	£4.36	£15.51	£21.69	£56.11	£52.98	£17.78	£6.75	n/a	£188.80
Kingston	£31.67	£33.23	£65.42	£21.33	£13.56	£8.63	£5.30	£7.62	£27.01	n/a	£213.77
Central London/West End	£11.08	£15.51	£13.08	£3.88	£48.81	£6.47	£22.96	£55.87	£31.51	n/a	£209.18
Other Outflow	£11.08	£8.86	£8.72	£93.07	£32.54	£49.64	£17.66	£55.87	£27.01	n/a	£304.46
Outflow Total	**£58.59**	**£66.46**	**£91.59**	**£133.79**	**£116.59**	**£120.86**	**£98.90**	**£137.15**	**£92.27**	**n/a**	**£916.21**
TOTAL	**£158.35**	**£221.54**	**£218.08**	**£193.90**	**£271.15**	**£215.81**	**£176.61**	**£253.98**	**£225.05**	**n/a**	**n/a**

Sources: *Table 2C NEMS Household Surveys 2009*

Table 7C: Comparison Penetration Rates/Available Expenditure 2021 - Morden and Colliers Wood Expansion

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total
Expenditure 2021	**£158.35**	**£221.54**	**£218.08**	**£193.90**	**£271.15**	**£215.81**	**£176.61**	**£253.98**	**£225.05**	**n/a**	**£1,934.47**
Market Share											
Wimbledon	44%	42%	31%	8%	14%	9%	4%	5%	18%	15%	
Mitcham	0%	1%	0%	0%	2%	11%	1%	0%	0%	5%	
Morden	1%	3%	3%	11%	1%	3%	1%	0%	0%	20%	
Colliers Wood	5%	16%	3%	10%	12%	17%	10%	5%	7%	25%	
Raynes Park	1%	1%	4%	1%	0%	0%	0%	0%	0%	15%	
Shannon Corner	3%	2%	2%	2%	1%	0%	0%	0%	0%	40%	
Borough Area Total	**54%**	**65%**	**43%**	**32%**	**30%**	**40%**	**16%**	**10%**	**25%**	**n/a**	
Wandsworth	5%	1%	1%	0%	10%	1%	3%	12%	30%	n/a	
Other in Rest of Study Area	4%	4%	14%	3%	17%	5%	25%	24%	4%	n/a	
Rest of Study Area Total	**9%**	**5%**	**15%**	**3%**	**27%**	**6%**	**28%**	**36%**	**34%**	**n/a**	
Croydon	3%	4%	2%	7%	8%	25%	30%	7%	3%	n/a	
Kingston	20%	15%	30%	10%	5%	4%	3%	3%	12%	n/a	
Central London/West End	7%	7%	6%	2%	18%	3%	13%	22%	14%	n/a	
Other Outflow	7%	4%	4%	46%	12%	22%	10%	22%	12%	n/a	
Outflow Total	**37%**	**30%**	**42%**	**65%**	**43%**	**54%**	**56%**	**54%**	**41%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
Turnover £M											
Wimbledon	£69.68	£93.05	£67.61	£15.51	£37.96	£19.42	£7.06	£12.70	£40.51	£64.15	£427.64
Mitcham	£0.00	£2.22	£0.00	£0.00	£5.42	£23.74	£1.77	£0.00	£0.00	£1.74	£34.89
Morden	£1.58	£6.65	£6.54	£21.33	£2.71	£6.47	£1.77	£0.00	£0.00	£11.76	£58.82
Colliers Wood	£7.92	£35.45	£6.54	£19.39	£32.54	£36.69	£17.66	£12.70	£15.75	£61.55	£246.18
Raynes Park	£1.58	£2.22	£8.72	£1.94	£0.00	£0.00	£0.00	£0.00	£0.00	£2.55	£17.01
Shannon Corner	£4.75	£4.43	£4.36	£3.88	£2.71	£0.00	£0.00	£0.00	£0.00	£13.42	£33.55
Borough Area Total	**£85.51**	**£144.00**	**£93.78**	**£62.05**	**£81.34**	**£86.33**	**£28.26**	**£25.40**	**£56.26**	**£155.17**	**£818.10**
Wandsworth	£7.92	£2.22	£2.18	£0.00	£27.11	£2.16	£5.30	£30.48	£67.52	n/a	£144.88
Other in Rest of Study Area	£6.33	£8.86	£30.53	£5.82	£46.10	£10.79	£44.15	£60.95	£9.00	n/a	£222.54
Rest of Study Area Total	**£14.25**	**£11.08**	**£32.71**	**£5.82**	**£73.21**	**£12.95**	**£49.45**	**£91.43**	**£76.52**	**n/a**	**£367.42**
Croydon	£4.75	£8.86	£4.36	£13.57	£21.69	£53.95	£52.98	£17.78	£6.75	n/a	£184.70
Kingston	£31.67	£33.23	£65.42	£19.39	£13.56	£8.63	£5.30	£7.62	£27.01	n/a	£211.83
Central London/West End	£11.08	£15.51	£13.08	£3.88	£48.81	£6.47	£22.96	£55.87	£31.51	n/a	£209.18
Other Outflow	£11.08	£8.86	£8.72	£89.19	£32.54	£47.48	£17.66	£55.87	£27.01	n/a	£298.42
Outflow Total	**£58.59**	**£66.46**	**£91.59**	**£126.03**	**£116.59**	**£116.54**	**£98.90**	**£137.15**	**£92.27**	**n/a**	**£904.13**
TOTAL	**£158.35**	**£221.54**	**£218.08**	**£193.90**	**£271.15**	**£215.81**	**£176.61**	**£253.98**	**£225.05**	**n/a**	**n/a**

Table 8C: **Comparison Shopping Penetration Rates and Available Expenditure 2026 (constant shares)**

Centre/Facilities	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**	**% Inflow**	**Total**
Expenditure 2026	**£203.09**	**£282.61**	**£278.43**	**£247.31**	**£350.58**	**£275.36**	**£228.09**	**£329.64**	**£290.99**	**n/a**	**£2,486.10**
Market Share											
Wimbledon	45%	44%	32%	9%	14%	9%	4%	5%	18%	15%	
Mitcham	0%	1%	0%	0%	2%	12%	1%	0%	0%	5%	
Morden	1%	2%	2%	5%	1%	2%	1%	0%	0%	20%	
Colliers Wood	4%	14%	2%	9%	11%	15%	9%	4%	6%	25%	
Raynes Park	1%	1%	4%	1%	0%	0%	0%	0%	0%	15%	
Shannon Corner	3%	3%	3%	3%	1%	0%	0%	0%	0%	35%	
Borough Area Total	**54%**	**65%**	**43%**	**27%**	**29%**	**38%**	**15%**	**9%**	**24%**	**n/a**	
Wandsworth	5%	1%	1%	0%	10%	1%	3%	12%	31%	n/a	
Other in Rest of Study Area	4%	4%	14%	4%	18%	5%	26%	25%	4%	n/a	
Rest of Study Area Total	**9%**	**5%**	**15%**	**4%**	**28%**	**6%**	**29%**	**37%**	**35%**	**n/a**	
Croydon	3%	4%	2%	8%	8%	26%	30%	7%	3%	n/a	
Kingston	20%	15%	30%	11%	5%	4%	3%	3%	12%	n/a	
Central London/West End	7%	7%	6%	2%	18%	3%	13%	22%	14%	n/a	
Other Outflow	7%	4%	4%	48%	12%	23%	10%	22%	12%	n/a	
Outflow Total	**37%**	**30%**	**42%**	**69%**	**43%**	**56%**	**56%**	**54%**	**41%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
Turnover £M											
Wimbledon	£91.39	£124.35	£89.10	£22.26	£49.08	£24.78	£9.12	£16.48	£52.38	£84.52	£563.46
Mitcham	£0.00	£2.83	£0.00	£0.00	£7.01	£33.04	£2.28	£0.00	£0.00	£2.38	£47.54
Morden	£2.03	£5.65	£5.57	£12.37	£3.51	£5.51	£2.28	£0.00	£0.00	£9.23	£46.14
Colliers Wood	£8.12	£39.57	£5.57	£22.26	£38.56	£41.30	£20.53	£13.19	£17.46	£68.85	£275.41
Raynes Park	£2.03	£2.83	£11.14	£2.47	£0.00	£0.00	£0.00	£0.00	£0.00	£3.26	£21.73
Shannon Corner	£6.09	£8.48	£8.35	£7.42	£3.51	£0.00	£0.00	£0.00	£0.00	£18.23	£52.08
Borough Area Total	**£109.67**	**£183.70**	**£119.73**	**£66.77**	**£101.67**	**£104.64**	**£34.21**	**£29.67**	**£69.84**	**£186.46**	**£1,006.35**
Wandsworth	£10.15	£2.83	£2.78	£0.00	£35.06	£2.75	£6.84	£39.56	£90.21	n/a	£190.18
Other in Rest of Study Area	£8.12	£11.30	£38.98	£9.89	£63.10	£13.77	£59.30	£82.41	£11.64	n/a	£298.53
Rest of Study Area Total	**£18.28**	**£14.13**	**£41.76**	**£9.89**	**£98.16**	**£16.52**	**£66.15**	**£121.97**	**£101.85**	**n/a**	**£488.71**
Croydon	£6.09	£11.30	£5.57	£19.79	£28.05	£71.59	£68.43	£23.07	£8.73	n/a	£242.62
Kingston	£40.62	£42.39	£83.53	£27.20	£17.53	£11.01	£6.84	£9.89	£34.92	n/a	£273.94
Central London/West End	£14.22	£19.78	£16.71	£4.95	£63.10	£8.26	£29.65	£72.52	£40.74	n/a	£269.93
Other Outflow	£14.22	£11.30	£11.14	£118.71	£42.07	£63.33	£22.81	£72.52	£34.92	n/a	£391.02
Outflow Total	**£75.14**	**£84.78**	**£116.94**	**£170.65**	**£150.75**	**£154.20**	**£127.73**	**£178.01**	**£119.30**	**n/a**	**£1,177.51**
TOTAL	**£203.09**	**£282.61**	**£278.43**	**£247.31**	**£350.58**	**£275.36**	**£228.09**	**£329.64**	**£290.99**	**n/a**	**n/a**

Sources: *Table 2C NEMS Household Surveys 2009*

Table 9C: **Comparison Penetration Rates/Available Expenditure 2026 - Morden and Colliers Wood Expansion**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total
Expenditure 2026	**£203.09**	**£282.61**	**£278.43**	**£247.31**	**£350.58**	**£275.36**	**£228.09**	**£329.64**	**£290.99**	**n/a**	**£2,486.10**
Market Share											
Wimbledon	44%	42%	31%	8%	14%	9%	4%	5%	18%	15%	
Mitcham	0%	1%	0%	0%	2%	11%	1%	0%	0%	5%	
Morden	1%	3%	3%	11%	1%	3%	1%	0%	0%	20%	
Colliers Wood	5%	16%	3%	10%	12%	17%	10%	5%	7%	25%	
Raynes Park	1%	1%	4%	1%	0%	0%	0%	0%	0%	15%	
Shannon Corner	3%	2%	2%	2%	1%	0%	0%	0%	0%	40%	
Borough Area Total	**54%**	**65%**	**43%**	**32%**	**30%**	**40%**	**16%**	**10%**	**25%**	**n/a**	
Wandsworth	5%	1%	1%	0%	10%	1%	3%	12%	30%	n/a	
Other in Rest of Study Area	4%	4%	14%	3%	17%	5%	25%	24%	4%	n/a	
Rest of Study Area Total	**9%**	**5%**	**15%**	**3%**	**27%**	**6%**	**28%**	**36%**	**34%**	**n/a**	
Croydon	3%	4%	2%	7%	8%	25%	30%	7%	3%	n/a	
Kingston	20%	15%	30%	10%	5%	4%	3%	3%	12%	n/a	
Central London/West End	7%	7%	6%	2%	18%	3%	13%	22%	14%	n/a	
Other Outflow	7%	4%	4%	46%	12%	22%	10%	22%	12%	n/a	
Outflow Total	**37%**	**30%**	**42%**	**65%**	**43%**	**54%**	**56%**	**54%**	**41%**	**n/a**	
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**	
Turnover £M											
Wimbledon	£89.36	£118.70	£86.31	£19.79	£49.08	£24.78	£9.12	£16.48	£52.38	£82.24	£548.24
Mitcham	£0.00	£2.83	£0.00	£0.00	£7.01	£30.29	£2.28	£0.00	£0.00	£2.23	£44.64
Morden	£2.03	£8.48	£8.35	£27.20	£3.51	£8.26	£2.28	£0.00	£0.00	£15.03	£75.14
Colliers Wood	£10.15	£45.22	£8.35	£24.73	£42.07	£46.81	£22.81	£16.48	£20.37	£79.00	£316.00
Raynes Park	£2.03	£2.83	£11.14	£2.47	£0.00	£0.00	£0.00	£0.00	£0.00	£3.26	£21.73
Shannon Corner	£6.09	£5.65	£5.57	£4.95	£3.51	£0.00	£0.00	£0.00	£0.00	£17.18	£42.94
Borough Area Total	**£109.67**	**£183.70**	**£119.73**	**£79.14**	**£105.17**	**£110.14**	**£36.50**	**£32.96**	**£72.75**	**£198.93**	**£1,048.69**
Wandsworth	£10.15	£2.83	£2.78	£0.00	£35.06	£2.75	£6.84	£39.56	£87.30	n/a	£187.27
Other in Rest of Study Area	£8.12	£11.30	£38.98	£7.42	£59.60	£13.77	£57.02	£79.11	£11.64	n/a	£286.97
Rest of Study Area Total	**£18.28**	**£14.13**	**£41.76**	**£7.42**	**£94.66**	**£16.52**	**£63.87**	**£118.67**	**£98.94**	**n/a**	**£474.24**
Croydon	£6.09	£11.30	£5.57	£17.31	£28.05	£68.84	£68.43	£23.07	£8.73	n/a	£237.40
Kingston	£40.62	£42.39	£83.53	£24.73	£17.53	£11.01	£6.84	£9.89	£34.92	n/a	£271.46
Central London/West End	£14.22	£19.78	£16.71	£4.95	£63.10	£8.26	£29.65	£72.52	£40.74	n/a	£269.93
Other Outflow	£14.22	£11.30	£11.14	£113.76	£42.07	£60.58	£22.81	£72.52	£34.92	n/a	£383.32
Outflow Total	**£75.14**	**£84.78**	**£116.94**	**£160.75**	**£150.75**	**£148.70**	**£127.73**	**£178.01**	**£119.30**	**n/a**	**£1,162.11**
TOTAL	**£203.09**	**£282.61**	**£278.43**	**£247.31**	**£350.58**	**£275.36**	**£228.09**	**£329.64**	**£290.99**	**n/a**	**n/a**

Table 10C: Comparison Retail Capacity and Floorspace Projections (constant market shares)

	2010	2013	2016	2021	2026
A - Available Expenditure £M					
Wimbledon	£272.03	£295.20	£341.74	£439.57	£563.46
Mitcham	£23.18	£25.10	£29.01	£37.16	£47.54
Morden	£22.55	£24.40	£28.20	£36.08	£46.14
Colliers Wood	£132.38	£143.77	£166.56	£214.56	£275.41
Raynes Park	£10.67	£11.53	£13.32	£17.01	£21.73
Shannon Corner	£33.04	£35.06	£38.26	£44.11	£52.08
LB Merton Total	**£493.85**	**£535.06**	**£617.09**	**£788.49**	**£1,006.35**
B - Turnover Existing Floorspace £M					
Wimbledon	£272.03	£277.47	£294.45	£325.10	£358.93
Mitcham	£23.18	£23.65	£25.09	£27.71	£30.59
Morden	£22.55	£23.00	£24.41	£26.95	£29.76
Colliers Wood	£132.38	£135.03	£143.29	£158.21	£174.67
Raynes Park	£10.67	£10.88	£11.55	£12.75	£14.08
Shannon Corner	£33.04	£33.70	£35.76	£39.48	£43.59
LB Merton Total	**£493.85**	**£503.73**	**£517.24**	**£540.86**	**£582.66**
C - Surplus Expenditure £M A - B					
Wimbledon	n/a	£17.74	£47.28	£114.47	£204.53
Mitcham	n/a	£1.45	£3.92	£9.45	£16.95
Morden	n/a	£1.40	£3.78	£9.13	£16.38
Colliers Wood	n/a	£8.74	£23.26	£56.35	£100.73
Raynes Park	n/a	£0.65	£1.77	£4.26	£7.65
Shannon Corner	n/a	£1.36	£2.50	£4.63	£8.48
LB Merton Total	**n/a**	**£31.33**	**£82.52**	**£198.29**	**£354.72**
D - Sales Density for New Floorspace £ PSM Net	£5,000	£5,100	£5,412	£5,975	£6,597
E - Retail Sales Floorspace Capacity Sq M Net					
Wimbledon	n/a	3,478	8,737	19,156	31,001
Mitcham	n/a	284	724	1,582	2,569
Morden	n/a	274	699	1,528	2,483
Colliers Wood	n/a	1,714	4,299	9,430	15,269
Raynes Park	n/a	128	327	713	1,159
Shannon Corner	n/a	266	463	775	1,286
LB Merton Total	**n/a**	**6,144**	**15,248**	**33,184**	**53,767**
F - Gross Retail Floorspace Capacity Sq M					
Wimbledon	n/a	4,637	11,649	25,542	41,335
Mitcham	n/a	379	965	2,110	3,426
Morden	n/a	365	932	2,037	3,311
Colliers Wood	n/a	2,285	5,732	12,573	20,358
Raynes Park	n/a	170	437	951	1,545
Shannon Corner	n/a	355	617	1,033	1,715
LB Merton Total	**n/a**	**8,192**	**20,331**	**44,245**	**71,689**

Sources: *Tables 3A, 3C to 8C*

Table 11C: Comparison Retail Capacity and Floorspace Projections (with Morden and Colliers Wood expansion)

	2010	2013	2016	2021	2026
A - Available Expenditure £M					
Wimbledon	£272.03	£295.20	£341.74	£427.64	£548.24
Mitcham	£23.18	£25.10	£29.01	£34.89	£44.64
Morden	£22.55	£24.40	£28.20	£58.82	£75.14
Colliers Wood	£132.38	£143.77	£166.56	£246.18	£316.00
Raynes Park	£10.67	£11.53	£13.32	£17.01	£21.73
Shannon Corner	£33.04	£35.06	£38.26	£33.55	£42.94
LB Merton Total	**£493.85**	**£535.06**	**£617.09**	**£818.10**	**£1,048.69**
B - Turnover Existing Floorspace £M					
Wimbledon	£272.03	£277.47	£294.45	£325.10	£358.93
Mitcham	£23.18	£23.65	£25.09	£27.71	£30.59
Morden	£22.55	£23.00	£24.41	£60.56	£66.87
Colliers Wood	£132.38	£135.03	£143.29	£247.84	£273.63
Raynes Park	£10.67	£10.88	£11.55	£12.75	£14.08
Shannon Corner	£33.04	£33.70	£35.76	£39.48	£43.59
LB Merton Total	**£493.85**	**£503.73**	**£517.24**	**£540.86**	**£582.66**
C - Surplus Expenditure £M A - B					
Wimbledon	n/a	£17.74	£47.28	£102.55	£189.30
Mitcham	n/a	£1.45	£3.92	£7.18	£14.05
Morden	n/a	£1.40	£3.78	-£1.75	£8.28
Colliers Wood	n/a	£8.74	£23.26	-£1.66	£42.36
Raynes Park	n/a	£0.65	£1.77	£4.26	£7.65
Shannon Corner	n/a	£1.36	£2.50	-£5.93	-£0.65
LB Merton Total	**n/a**	**£31.33**	**£82.52**	**£104.66**	**£260.99**
D - Sales Density for New Floorspace £ PSM Net	£5,000	£5,100	£5,412	£5,975	£6,597
E - Retail Sales Floorspace Capacity Sq M Net					
Wimbledon	n/a	3,478	8,737	17,161	28,694
Mitcham	n/a	284	724	1,202	2,130
Morden	n/a	274	699	-292	1,254
Colliers Wood	n/a	1,714	4,299	-277	6,421
Raynes Park	n/a	128	327	713	1,159
Shannon Corner	n/a	266	463	-992	-98
LB Merton Total	**n/a**	**6,144**	**15,248**	**17,514**	**39,560**
F - Gross Retail Floorspace Capacity Sq M					
Wimbledon	n/a	4,637	11,649	22,881	38,258
Mitcham	n/a	379	965	1,603	2,840
Morden	n/a	365	932	-390	1,673
Colliers Wood	n/a	2,285	5,732	-370	8,562
Raynes Park	n/a	170	437	951	1,545
Retail Warehouses (out of centre)	n/a	355	617	-1,323	-131
LB Merton Total	**n/a**	**8,192**	**20,331**	**23,352**	**52,746**

Sources: *Tables 3A, 3C to 9C*

Appendix 6 Operator Requirements

LONDON BOROUGH OF MERTON COUNCIL

OPERATOR REQUIREMENTS SURVEY

Approximately 300 questionnaires were sent out to a range of national/ regional retail and leisure companies.

10 responses were received (3% response rate) and the following companies:

Table 5.1 Companies with a requirement

Operator & Trading Names	Space Required (sq.ft)	Locations
Wilkinson Hardware Stores Ltd	14,000 – 30,000	Wimbledon town centre, Mitcham town centre, Morden town centre, Colliers Wood, Out of Centre and Local Centres.
Lidl	55,000	Wimbledon town centre, Mitcham town centre, Morden town centre, Colliers Wood, Out of Centre and Local Centres.

Companies with no current requirement

- SCS
- River Island
- Tie Rack
- Clarks
- WH Smith
- Schuh Ltd
- Furniture Village
- Showcase Cinema

Questionnaire Results

1 **Does your company have a requirement for new or expanded premises in London Borough of Merton?**

Yes	2 (20%)
No	8 (80%)

2 **What are the mean reasons why you are not looking for premises?**

- Likely cannibalisation of business of neighbouring stores (1)
- Not on acquisition list/ acquisition strategy (2)

- Satisfactory representation in the catchment (3)
- Not the right type of premises at affordable rates (1)
- No reason stated (1)

Could this change in the future?

- Only if another store closed (1).
- No (1)
- No answer stated (6)

3 **What additional Information might influence you in deciding to choose to locate in LB Merton?**

- Flow of information regarding potential new sites to be designated for retail use and potential change of use (Lidl)

4 **What has prevented you from securing this requirement to date**

- Lack of large space (Wilkinson Hardware Stores)
- High land values, land availability (Lidl)

ESTATES GAZZETTE (EGI) RETAILER AND LEISURE REQUIREMENTS (December 2009)

Wimbledon

Table 5.1 Wimbledon Retailer and Leisure Requirements

Company Name	Sector	Requirement (SQ.M)	Requirement (Centre/Area)
Lakeland		279	In Town
OKA	Home	232-372	In Town
Ollie & Nic		60-65	Not specified
Papa John's	Restaurants	Not specified	Not specified
Phones 4U		28-139	In Town
Poundworld	Department Store and Variety Store	279-929	Not Specified
Store Twenty One	Clothing	372-557	Not specified
Subway	Restaurants, Bars and Cafes	19-111	In Town
T Mobile		74-93	In Town
Waitrose	Food	929-3,252	In Town
Whole Foods	Food	Not specified	Not specified

EGI did not identify any retailer or leisure operator requirements for Mitcham, Morden or Colliers Wood Centres.

Appendix 7 Development Sites

12.0 Site Evaluation

12.1 The site assessment is based on the following factors:

- existing land uses and availability, categorised as follows:
  - short to medium term – up to 2016;
  - long term - likely to be completed after 2016;
- commercial potential for retail/leisure development and the most likely form of development, categorised as follows:
  - prime site - likely to attract a developer and occupiers;
  - secondary site – which may generate limited demand or only demand for a specific kind of use.
- potential scope to accommodate additional retail/leisure floorspace (net increase), categorised as follows:
  - small scale – under 1,000 sq m gross floorspace;
  - medium scale – 1,000 to 5,000 sq m gross floorspace;
  - large scale – over 5,000 sq m gross floorspace;
- potential development constraints; and
- possible alternative uses.

12.2 The overall development prospects of each opportunity, taking on board all of the factors listed above, has been categorised as follows:

- Good - development sites that have good prospects for providing additional retail/leisure floorspace, and should be considered for implementation in the short to medium term;
- Reasonable - development sites which are well located and may provide potential for additional floorspace, although obstacles to development will need to be overcome, but implementation may only be achieved in the long term; and
- Poor - development sites that may be unattractive or unsuitable for retail or leisure development where their delivery is very uncertain.

12.3 The overall rating is based on an initial evaluation for each site. The level of analysis undertaken at this stage is limited, i.e. detailed appraisals of development constraints, land ownership and potential development costs have not been undertaken. More detailed examinations of each site will need to be undertaken before sites can be brought forward for development or ruled out as viable options. The evaluations undertaken for each opportunity are not detailed planning appraisals and they do not imply that planning permission should be granted or refused for retail/leisure development on any site. However, the evaluation is expected to identify potentially suitable development opportunities that may be worthy of further consideration by the Council. This evaluation provides a framework within which the Council can consider the implementation of a development strategy for each centre.

SITE W1: WIMBLEDON STATION (UDP 1WTC)

The Wimbledon Station site comprises Wimbledon Station and concourse, unit shops fronting Wimbledon Bridge together with residential and commercial uses along Alexandra Road. The site is allocated in the UDP (site 1WTC) for redevelopment comprising an improved public transport interchange and town centre uses, including offices, retail, residential, leisure, hotel and conference centre, public square and station concourse. The site could potentially accommodate an extension to the Centre Court Shopping Centre. Comprehensive redevelopment of the site to provide a significant amount of town centre uses would require costly decking over the station platforms/ railway lines. The site extends to 3.7 hectares, including the buildings on Alexandra Road.

Evaluation Criteria	Comment
Availability	Long term
Scale of Development (retail/leisure/community/cultural)	Large scale (over 10,000 sq.m gross assuming single storey development only over station platforms/railway lines)
Commercial Potential	The site is within the main retail core of the town centre and adjacent to the Centre Court Shopping Centre. Offers potential to extend the Centre Court Shopping Centre to provide retail/leisure floorspace within the prime retail area. Largest potential development site within Wimbledon town centre.
Likely Type of Development	Extension to the Centre Court Shopping Centre at the upper level, decked over the railway station platforms. A one or two storey extension would be suitable for Class A1 comparison retail uses, and could potentially include a supermarket.
Development Constraints	The high costs and physical difficulties of decking over the railway platforms would need to be overcome. High density and high value generating uses would be required in order to make this financially viable. Therefore, the development would need to be retail led perhaps with some residential or other town centre uses on upper floors. However, massing and the need to deck over the railway platforms will restrict the number of storeys. The comprehensive redevelopment of the site would require co-operation between the owners of the Centre Court Shopping Centre and the rail authorities. Acquisition of the residential units along Alexander Road may also be costly. If these units are not included in the

SITE W1: WIMBLEDON STATION (UDP 1WTC)	
	redevelopment area then there may be amenity issues arising from the massing of the development and close proximity to residential units. The proximity of the site to the Conservation Areas will also need to be taken into consideration.
Possible Alternative Uses	Retail use is the only use likely to generate the high value required to deck over the railway platforms. However smaller scale redevelopment of the station precinct only could include office or residential uses on upper floors.
Access	Existing access from the roof of the Centre Court Centre (via Queens Road), Alexandra Road or from Wimbledon Bridge/Station Approach.
Overall Development Prospects	Given the significant work and expense that would be involved in redeveloping this site, prospects in the short to medium term are poor. In the long term, prospects are reasonable, assuming cooperation between the relevant land owners.

SITE W2: THE BROADWAY EXTENSION SITE (UDP 2WTC)

The area occupied by a surface car park with access from Hartfield Road (approx. 150 spaces) and retail units fronting The Broadway. The largest of the retail units is the former Woolworth store, which has now been reoccupied by TK Maxx, with a total floorspace of around 2,200 sq.m over two floors. The site is allocated in the UDP (2WTC – formerly P3) for mixed use development including primarily arts, cultural, community, shopping and hotel. The site area measures 0.6 hectares. However, if residential units in Ashbourne Terrace and the bus stops on Cyril Black Way are included in the development area then a site of over one hectare could be assembled.

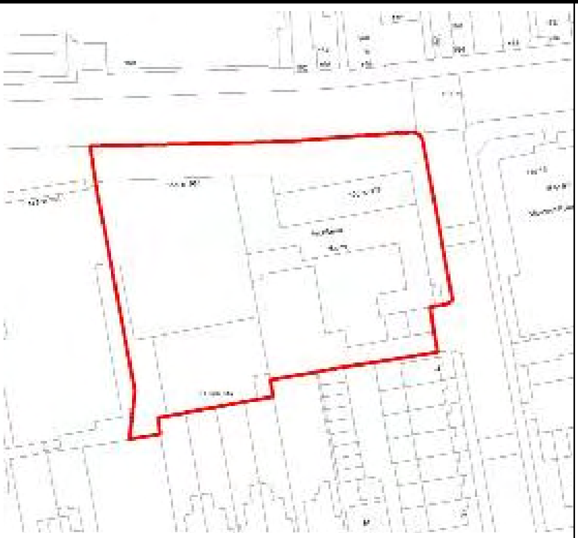
Evaluation Criteria	Comment
Availability	Medium term
Scale of Development (retail/leisure/community/cultural)	Medium scale (up to 5,000 sq.m gross additional floorspace) assuming two storeys of commercial space, but the exclusion of residential properties in Ashbourne Terrace.
Commercial Potential	The site is within the main retail core of the town centre and adjacent to the Broadway development. There is potential to extend the Broadway development to provide retail/leisure floorspace within this prime retail location.
Likely Type of Development	Comprehensive high density redevelopment of the site with retail use at ground floor level with basement car parking to replace the loss of this important town centre car park, and other town centre uses (leisure, cultural, community facilities, hotel) or residential use on upper floors. The 2003 Planning Brief for the site suggests a maximum height of six storeys.
Development Constraints	The high costs of underground car parking would need to be overcome. High density development is likely to be required in order to make this financially viable (at least three storeys). Therefore, the development would need to be retail led at ground floor level. The acquisition of the residential units at Ashbourne Terrace would be costly but would significantly increase the amount of new development.
Possible Alternative Uses	Office, hotel and/or residential uses.
Access	Existing service access from Hartfield Road.
Overall Development Prospects	Reasonable

SITE W3: CAR PARK ADJACENT TO NEW WIMBLEDON THEATRE (UDP 3WTC)

This area occupied by a surface car park (approximately 70 spaces) adjacent to the New Wimbledon Theatre. The site is allocated in the UDP (3WTC) for shopping, cultural, community, recreational, hotel, offices and car parking. The site measures 0.2 hectares.

Evaluation Criteria	Comment
Availability	Short to medium term
Scale of Development (retail/leisure/community/cultural)	Small scale - up to 1,000 sq.m gross at ground floor
Commercial Potential	Located within the defined secondary shopping area, and away from the core shopping area. However, the site has good frontage to The Broadway.
Likely Type of Development	The ground floor could be suitable for Class A1 retail or Class A2/A3/A4/A5 uses on The Broadway frontage. Alternatively, leisure, cultural and community uses could be suitable on the ground and/or first floor levels. The 2003 planning brief for the site envisages that a public hall/arts centre will be provided above ground floor, and refers to underground car parking.
Development Constraints	The secondary shopping location may be unattractive for A1 multiple retailers. If required, the replacement of the existing car parking spaces underground will be costly and may affect the commercial viability of the development. The adjacent New Wimbledon Theatre is a listed building, and any redevelopment must take into account potential impacts on the listed building and its setting.
Possible Alternative Uses	Retention of existing car park/use for offices or residential development.
Access	Existing access from the Broadway. Second access from Russell Road is narrow.
Overall Development Prospects	Reasonable (if underground car parking is necessary) Good (if loss of car parking on site does not need to be replaced)

SITE W4: PARK HOUSE AND 153-161 THE BROADWAY (UDP 4WTC)



This site is occupied by an unattractive 1960s office building with a Majestic Wine store occupying the ground floor, and the adjacent vacant bar/office building. The existing buildings on this site are tired and dated. Part of the site is allocated in the UDP (4WTC) for A1/A2/A3, residential and B1 offices. The adjacent former cinema building has recently been redeveloped to provide offices. The site area is approximately 0.3 hectares.

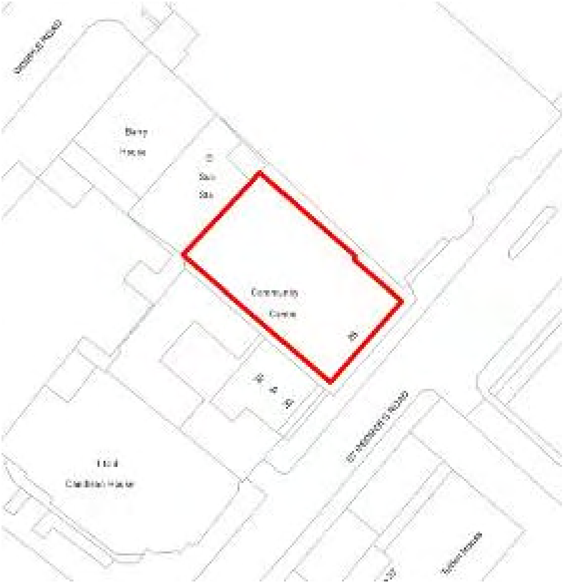
Evaluation Criteria	Comment
Availability	Medium term
Scale of Development (retail/leisure/community/cultural)	Medium scale – up to 2,000 sq.m at ground floor (net gain of 800 sq.m gross). Given the precedent of surrounding buildings (and Park House), up to six additional storeys above may be acceptable.
Commercial Potential	Secondary area and not defined shopping frontage. However, the site has frontage to The Broadway.
Likely Type of Development	The ground floor could be suitable for Class A1 retail or Class A2/A3/A4/A5 uses on the Broadway frontage. The Majestic Wine unit has a ground floor area of approximately 400 sq.m gross and the vacant former bar has a ground floor area of approximately 800 sq.m gross. If redeveloped, the combined site could provide ground floor commercial floorspace of up to 2,000 sq.m gross, either as a single large unit or small retail units. Alternatively, leisure, cultural and community uses could be suitable on the ground and/or first floor levels. The net increase in retail/leisure floorspace will reflect the loss of the existing retail/bar units. The upper floors of the development would be suitable for office, residential, hotel, community or cultural uses.
Development Constraints	The site's secondary location may be unattractive for A1 multiple retailers.
Possible Alternative Uses	Retention of existing office/commercial buildings. Redevelopment for office, residential or hotel use.
Access	Existing access from The Broadway and Southey Road.
Overall Development Prospects	Reasonable

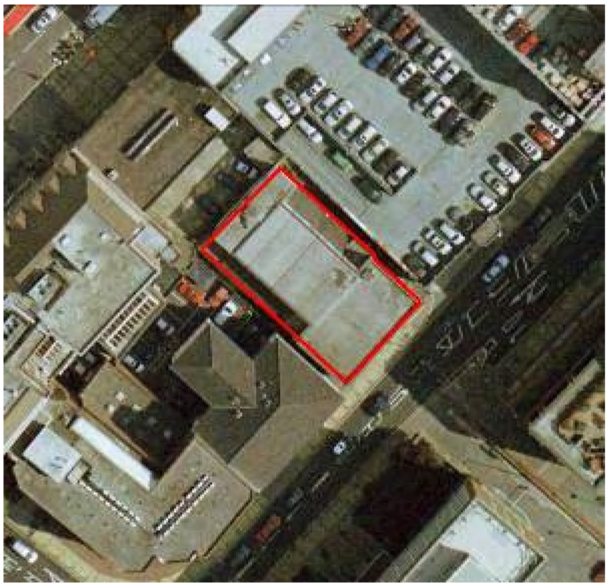
SITE W5: YMCA, 196-224 THE BROADWAY (UDP 5WTC)

The site contains the existing YMCA Youth Hostel. The existing building on site includes a seven storey tower, and the buildings appear tired and dated. The site is allocated in the UDP (5WTC) for mixed use Class A1/A2/A3/A4/A5 or hotel/hostel use. Part of the site on the corner of Trinity Road (222-224 The Broadway) is currently vacant, and permission has been granted, subject to a S.106 for redevelopment comprising a building ranging in height from three to six-storeys to provide 14 x 2 bedroom flats, financial/professional services (Class A2) and Offices (Class B1) (ref. 07/P0055). The total site area is approximately 0.3 hectares.

Evaluation Criteria	Comment
Availability	Medium term
Scale of Development (retail/leisure/community/cultural)	Medium scale – up to 2,000 sq.m at ground floor level. Given the precedent of surrounding buildings (and the YMCA), up to six additional storeys above may be acceptable.
Commercial Potential	Adjacent to the defined secondary shopping area.
Likely Type of Development	It is understood that the YMCA may seek to acquire and redevelop a wider site (potentially to include 162-194 The Broadway). This would increase the site area to approximately 0.7 hectares. The most appropriate type of development is likely to be commercial Class A1-A5 uses at ground floor level with a YMCA/offices above.
Development Constraints	The site's secondary location may be unattractive for A1 multiple retailers. The acquisition of 162-194 The Broadway is likely to be costly but would significantly increase the amount of new development that could be accommodated on the site.
Possible Alternative Uses	Redevelopment for hotel/hostel or office use.
Access	Existing access from The Broadway and Trinity Road.
Overall Development Prospects	Good

SITE W6: THE SIR CYRIL BLACK COMMUNITY CENTRE, ST GEORGES ROAD (UDP 6WTC)





The site currently contains the St Georges Road Community Centre. The existing two storey building appears tired and dated, and its external appearance is in a poor state of repair. The site is allocated in the UDP (6WTC) for community/Class D2 leisure use. The site measures 0.05 hectares.

Evaluation Criteria	Comment
Availability	Short term
Scale of Development (retail/leisure/community/cultural)	Small scale – up to 500 sq.m gross at ground floor level. Two-three additional storeys above may be acceptable, in the context of surrounding buildings.
Commercial Potential	Located away from the main retail core and adjacent to the rear service access of the Sainsburys supermarket.
Likely Type of Development	Community or leisure uses, possibly with offices above. Potential redevelopment could incorporate the site to the rear of the Community Centre, which has frontage to Worple Road and is immediately adjacent to the Sainsburys supermarket. The building is currently in retail/commercial use, and appears squat as it is sandwiched between taller buildings.
Development Constraints	May not be attractive to commercial leisure operators due to its off prime location.
Possible Alternative Uses	Retail, particularly if combined with the Worple Road frontage.
Access	Existing access from St Georges Road. No off-street servicing provision.
Overall Development Prospects	Reasonable

SITE W7: COLLINGHAM HOUSE, GLADSTONE ROAD/RUSSELL ROAD	
	

The site has frontage to Gladstone Road and Russell Road. At ground floor level, the site includes Evans Cycles and the Wibbas Down Inn Public House, with offices and parking located above. The existing building is unattractive and detracts from the street scene both on Gladstone Road and the rear of the premises on Russell Road. The site measures approximately 0.2 hectares.

Evaluation Criteria	Comment
Availability	Short to medium term
Scale of Development (retail/leisure/community/cultural)	Medium scale – approximately 1,200 sq.m at ground floor level.
Commercial Potential	Located within the defined secondary shopping area and close to the core shopping area.
Likely Type of Development	High street type retail shops at ground floor level, with commercial/residential above.
Development Constraints	Irregular site shape may constrain development. Proximilty of the listed New Wimbledon Theatre would also be a consideration in any redevelopment.
Possible Alternative Uses	Leisure/entertainment uses.
Access	Access currently from Gladstone Road and Russell Road.
Overall Development Prospects	Reasonable.

SITE W8: WIMBLEDON BRIDGE HOUSE

Wimbledon Bridge House is located above the railway tracks, opposite the railway station on the south side of Wimbledon Bridge. The site comprises retail uses fronting Wimbledon Bridge, including Next and WH Smiths, office uses and a multi-storey car park with approximately 300 spaces. The building fronting Wimbledon Bridge is three storeys in height, and increases to seven storeys fronting Hartfield Road/Hartfield Crescent. The site measures approximately 0.9 hectares.

Evaluation Criteria	Comment
Availability	Medium to long term
Scale of Development (retail/leisure/community/cultural)	Large scale - up to 10,000 sq.m over two storeys
Commercial Potential	Part of the site fronting Wimbledon Bridge is within the main retail core of the town centre. Offers potential provide additional retail/leisure floorspace within the prime retail area.
Likely Type of Development	Redevelopment to provide two storeys of retail floorspace above the railway lines, with leisure/ other town centre uses and/or residential above.
Development Constraints	The high costs and physical difficulties of decking over the railway platforms would need to be overcome. High density and high value generating uses would be required in order to make this financially viable. Therefore, the development would need to be retail led perhaps with some residential or other town centre uses on upper floors. The site is adjacent to the Wimbledon Broadway conservation area, and issues such as massing will need to be taken into consideration. There may be a requirement to incorporate replacement car parking.
Possible Alternative Uses	Retail use is the only use likely to generate the high value required to deck over the railway platforms.
Access	Access from Wimbledon Bridge, Hartfield Road and Hartfield Crescent.
Overall Development Prospects	Reasonable

SITE MOR1: LAND TO THE REAR OF MORDEN UNDERGROUND STATION, MORDEN (UDP 1MO)	
	
The area occupied by Morden Underground Station is allocated in the UDP (1MO) for redevelopment including an improved public transport interchange and mixed use development, including an extension to the existing food store (Sainsbury's), car parking, leisure, housing, offices and public open space. The site area measures approximately 2.5 hectares.	

Evaluation Criteria	Comment
Availability	Medium to Long Term
Scale of Development (retail/leisure/community/cultural)	Large scale (over 5,000 sq.m gross) – assuming two storeys of commercial space.
Commercial Potential	Within the heart of the town centre. Offers potential to extend the Sainsbury's store (or provide an enlarged replacement store). Good frontage onto London Road.
Likely Type of Development	Extension to the existing food store, and/or provision of larger retail units on London Road or a shopping mall leading off London Road. Leisure, office, residential and / or community uses on upper floors.
Development Constraints	The high costs of replacing decked car parking and redevelopment of the underground station. Land acquisition and multiple ownerships could be problematic if shop premises on London Road are included. Strength of demand for retail/leisure premises may be weak. Redevelopment of site would require cooperation between Sainsbury's and Transport for London.
Possible Alternative Uses	Extension of the food store with high density development above is the only use likely to generate the high value required to provide replacement decked car parking and fund the redevelopment of the underground station. However smaller scale redevelopment of the station only could include office or residential uses on upper floors.
Access	From London Road and/or Kenley Road.
Overall Development Prospects	Reasonable - assuming Sainsbury's and TfL's commitment.

SITE MOR2: LAND ADJACENT TO ICELAND, MORDEN

This area occupied by Lidl, Iceland and the surface level car park to the rear in Morden town centre could be reconfigured if railway sidings land adjacent to the site were included. However, the railway sidings land is identified as a green corridor in the UDP. The site measures approximately 1.1ha.

Evaluation Criteria	Comment
Availability	Medium Term
Scale of Development (retail/leisure/community/cultural)	Small scale (up to 1,000 sq.m gross)
Commercial Potential	Within the heart of the town centre. Offers potential to extend/ reconfigure existing retail units to provide better frontage on to London Rd.
Likely Type of Development	Extension and reconfiguration of existing retail premises, perhaps with residential development or community facilities above.
Development Constraints	The expansion into the railway sidings may be unacceptable due to the impact on the green corridor. The cost of redevelopment and extension may not be viable due to the relatively small increase in floorspace. However, higher density development on upper floors may assist viability. Retention of car parking spaces will restrict the amount of additional development possible.
Possible Alternative Uses	Retention of existing retail premises and car park – use for offices or residential development.
Access	Existing access from Aberconway Road.
Overall Development Prospects	Reasonable (if impact on green corridor is acceptable).

SITE MOR3: LAND TO THE REAR OF CROWN LANE, MORDEN

The land to the rear of shop premises on Crown Lane, either side of Windermere Avenue, is relatively low density. This area could provide an opportunity to redevelop, improve and/or extend shop premises on the Crown Lane Frontage. The site measures approximately 0.5 hectares.

Evaluation Criteria	Comment
Availability	Medium to Long Term
Scale of Development (retail/leisure/community/cultural)	Small scale (up to 1,000 sq.m gross – ground floor)
Commercial Potential	Relatively secondary area away from the prime shopping area on London Road. However, good frontage onto Crown Lane.
Likely Type of Development	The ground floor could be suitable for extended Class A1 retail or Class A2/A3/A4/A5 units fronting onto Crown Lane. Higher density residential or office use could be provided on upper floors.
Development Constraints	The site's secondary location may be unattractive for A1 multiple retailers. There are likely to be in multiple ownerships which may make comprehensive redevelopment difficult.
Possible Alternative Uses	Retention of existing shop premises.
Access	Existing access from Crown Lane/Windermere Avenue.
Overall Development Prospects	Reasonable

SITE MOR4: LANDED BOUNDED BY ABERCONWAY ROAD AND MORDEN HALL ROAD

This area is currently occupied by a mix of retail units and residential dwellings. The site size is approximately 0.95 hectares.

Evaluation Criteria	Comment
Availability	Long Term
Scale of Development (retail/leisure/community/cultural)	Medium scale: Up to 6,000 sq.m.
Commercial Potential	The Abbotsbury Road and Aberconway Road has no clear frontage onto the main commercial area which may not be commercially viable. The Council through the More Morden Vision Booklet is seeking to extend retail uses to this site to extend the retail frontage.
Likely Type of Development	Retail and residential mixed use development. Retail units should be small scale to provide local services and retail uses to ensure that the aim to extend the retail frontage is effective and well used.
Development Constraints	The residential dwellings would need to be acquired before development can commence. This is likely to be costly and timely, and subject to a lot of resistance by the residents.
Possible Alternative Uses	As existing.
Access	Abbotsbury Road and/or Aberconway Road.
Overall Development Prospects	Poor – secondary area is likely to cause viability constraints and acquisition of dwellings likely to be timely and costly.

SITE MI1: CLARENDON GROVE/UPPER GREEN EAST, MITCHAM (UDP 8MI)	
	

The area is occupied by a tyre and exhaust workshop and is allocated as part of a development site in the UDP (8MI). The site allocation is for retail and residential use. The residential element of the site (to the north) has been developed. The remaining area of the site is approximately 0.07 hectares.

Evaluation Criteria	Comment
Availability	Short to Medium Term
Scale of Development (retail/leisure/community/cultural)	Small scale (about 400 sq.m gross – ground floor level).
Commercial Potential	Secondary shopping frontage but reasonably close to the core shopping area. Good frontage to Upper Green East.
Likely Type of Development	The ground floor could be suitable for Class A1 retail or Class A2/A3/A4/A5 uses on to Upper Green East (1 or 2 units) with residential/ offices above.
Development Constraints	The workshop would need to be acquired.
Possible Alternative Uses	Retention of existing workshop use – use for residential or office development.
Access	As existing.
Overall Development Prospects	Reasonable

SITE MI2: DREAMS BEDS, LONDON ROAD (UDP 7MI AND 38P)

The site occupied by Dreams Beds and adjacent car parking is allocated in the UDP (7MI and 38P) for residential use. The site size is 0.29 hectares.

Evaluation Criteria	Comment
Availability	Short to Medium Term
Scale of Development (retail/leisure/community/cultural)	Medium scale (about 1,500 sq.m gross – ground floor level).
Commercial Potential	Peripheral area about 300 metres to the north of the core shopping area.
Likely Type of Development	The ground floor could be suitable for Class A1 retail or Class A2/A3/A4/A5 uses on to London Road (up to 10 units) with residential above.
Development Constraints	The Dreams Beds Unit would need to be acquired for comprehensive redevelopment. Therefore the net increase in retail space may be minimal. The site's secondary location may be unattractive to retailers.
Possible Alternative Uses	Retention of existing Dreams Beds store – use for residential development as proposed in the UDP
Access	As existing.
Overall Development Prospects	Poor (acquisition of Dreams Beds uncertain – limited net gain in retail use).

SITE MI3: WEST SIDE OF LONDON ROAD, MITCHAM (UDP 4MI)	
	

This area occupied by an outlet selling garden sheds and fencing is allocated as part of a development site in the UDP (4MI). A health centre has been developed on the northern part of the site. The remaining undeveloped part of the site allocation is approximately 0.2 hectares.

Evaluation Criteria	**Comment**
Availability	Short to Medium Term
Scale of Development (retail/leisure/community/cultural)	Small scale (about 500 sq.m gross – ground floor level).
Commercial Potential	Peripheral area over 300 metres from the core shopping area.
Likely Type of Development	The ground floor could be suitable for Class A1 retail or Class A2/A3/A4/A5 uses on to London Road with residential/ offices above.
Development Constraints	The retail outlet would need to be acquired. Therefore the net increase in retail space may be minimal. The site's secondary location may be unattractive to retailers.
Possible Alternative Uses	Retention of existing use – use for residential or office development as proposed in the UDP
Access	As existing.
Overall Development Prospects	Poor (acquisition of existing use – limited net gain in retail space).

SITE MI4: LAND EAST OF WESTERN ROAD (JAMES ESTATE)	
	
The site is occupied by a single storey retail warehouse building (currently occupied by Smyths Toys) and an ancillary surface level car park. It is approximately 1 hectare in size.	

Evaluation Criteria	Comment
Availability	Short to Medium Term
Scale of Development (retail/leisure/community/cultural)	Medium scale (2,800-3,000 sq.m gross – ground floor level).
Commercial Potential	Within the town centre boundary and within 300 metres of the Core shopping area at its nearest point. Therefore, at least part of the site could be considered to be edge of centre for retail and a town centre site for leisure uses based on the definitions within PPS4. The site has good road frontage on Western Road and is likely to be attractive to large format retailers/leisure operators.
Likely Type of Development	Low density retail or leisure development. Could accommodate a foodstore.
Development Constraints	The retail unit would need to be acquired.
Possible Alternative Uses	Retention of existing retail use – use for residential or office development.
Access	As existing.
Overall Development Prospects	Reasonable

SITE MI5: SOUTH SIDE OF WESTERN ROAD ADJACENT TO GAS WORKS (UDP 10MI)

The site is occupied by two storey building occupied by a roofing company and an adjacent terrace yard. It is 0.1 hectare in size, and is allocated in the UDP for Class A1 or B1 uses (Site 10MI).

Evaluation Criteria	Comment
Availability	Short to Medium Term
Scale of Development (retail/leisure/community/cultural)	Small - medium scale (about 600 sq.m gross – ground floor level).
Commercial Potential	Within the town centre boundary and within 300 metres of the Core shopping area at its nearest point. It is an edge of centre for retail and a in centre site for leisure uses based on the definitions within PPS4. The site has good road frontage on Western Road and is likely to be attractive to small scale format retailers/leisure operators.
Likely Type of Development	High density retail or leisure development. Could form part of a residential/commercial mixed use scheme.
Development Constraints	The roofing unit would need to be acquired.
Possible Alternative Uses	Retention of existing use – use office development in accordance with the UDP.
Access	As existing.
Overall Development Prospects	Reasonable (assuming the unit can be acquired).

SITE MI6: CORNER OF ST MARK'S ROAD AND MAJESTIC WAY (UDP 2MI)

The site is occupied by Morrisons foodstore at ground floor level with a multi-storey car park above. It is 0.39 ha in size and is allocated in the UDP for a variety of uses including Class A1, A3, B1, C3 and D2, in addition to replacement car parking (Site 2MI).

Evaluation Criteria	Comment
Availability	Medium to Long Term
Scale of Development (retail/leisure/community/cultural)	Medium scale (about 2,000-2,500 sq.m gross – ground floor level).
Commercial Potential	Within the town centre boundary and the Core shopping area. It is an attractive site for retail or leisure operators situated along Majestic Way.
Likely Type of Development	High density retail or leisure development. Should provide an element of replacement car parking. A replacement enhanced foodstore could be considered for this site.
Development Constraints	The site is in use as a supermarket and car park.; This would need to be acquired in the short to medium term, and may need Morrison's co-operation to bring this site forward.
Possible Alternative Uses	Retention of existing use – use office development in accordance with the UDP.
Access	As existing.
Overall Development Prospects	Poor : acquisition of existing use, re-provision of car parking facilities may limit the net gain of commercial uses.

SITE MI7: SOUTH SIDE OF MAJESTIC WAY (UDP 3MI)	
	
The site is occupied by a terrace of retail units and a surface level car park and is 0.41 ha in size . It is allocated in the UDP for Class A1 and A3 use with a retained element of car parking (Site 3MI).	

Evaluation Criteria	Comment
Availability	Medium to Long Term
Scale of Development (retail/leisure/community/cultural)	Medium scale (about 6,500 sq.m gross – ground floor level).
Commercial Potential	Within the town centre boundary and the Core shopping area. It is an attractive site for retail or leisure operators situated along Majestic Way, which is located within the core of the centre.
Likely Type of Development	High density retail or leisure development. Should provide an element of replacement car parking, and this could take the form of an undercroft car park to maximise development on the site.
Development Constraints	The site is currently in use. The retail units are occupied by a number of different operators, and acquiring the units may be timely and costly. The
Possible Alternative Uses	Retention of existing use – use office development in accordance with the UDP.
Access	As existing.
Overall Development Prospects	Poor : acquisition of existing uses is likely to be timely and costly.

SITE MI8: EAST OF HOLBORN WAY, NORTH OF UPPER GREEN WEST (UDP 1MI)

The site is largely occupied by a surface level car park, although there are buildings located to the south east of the site. The site is 0.38 hectares in size and is allocated in the UDP for a mix of uses including Class A1, A3, B1, C3 and D2 uses (Site 1MI).

Evaluation Criteria	Comment
Availability	Medium Term
Scale of Development (retail/leisure/community/cultural)	Medium scale (about 2,000-2,500 sq.m gross – ground floor level).
Commercial Potential	Within the town centre boundary and the Core shopping area. The main frontage is onto Holborn Way, which may not be a viable frontage for commercial operators.
Likely Type of Development	High density residential/leisure mixed used scheme with residential above and undercroft car parking.
Development Constraints	Holborn Way is a busy ring road which may inhibit pedestrian access to the site. The site has an awkward layout which may limit what can be developed on the site.
Possible Alternative Uses	Residential and offices
Access	As existing.
Overall Development Prospects	Reasonable

SITE MI9: JUNCTION OF WESTERN ROAD AND LOVE LANE (UDP 9MI)

The site is occupied by a car garage and is 0.15 ha in size. It is allocated in the UDP for Class A1 and B1 use (Site 9MI).

Evaluation Criteria	Comment
Availability	Medium to Long Term
Scale of Development (retail/leisure/community/cultural)	Small scale (about 1,000 sq.m gross – ground floor level).
Commercial Potential	Within the town centre boundary and within 300 metres of the Core shopping area at its nearest point. It is an edge of centre for retail and a in centre site for leisure uses based on the definitions within PPS4. The site has good road frontage on Western Road and is likely to be attractive to small scale format retailers/leisure operators.
Likely Type of Development	High density retail or leisure development.
Development Constraints	The site is currently in use and would need to be acquired.
Possible Alternative Uses	Retention of existing use –office use development in accordance with the UDP.
Access	As existing.
Overall Development Prospects	Poor: acquisition of existing uses is likely to be timely and costly.

SITE CW1: LAND BOUNDED BY CHRISTCHURCH ROAD, HIGH STREET AND PRIORY RETAIL PARK (UDP1CW)	
	

The site is part occupied by a vacant tower block, which is currently being demolished. Part of the site has already been cleared. The site occupies an area of 0.7 ha. The site is located opposite Colliers Wood Underground Station and could have potential for retail or leisure use. The site is located within the Colliers Wood Urban Centre and is allocated in the LB Merton UDP for offices, residential, hotels, community transport interchange and public open space.

Evaluation Criteria	Comment
Availability	Medium to long term
Scale of Development (retail/leisure/community/cultural)	Medium scale – approximately 4,000 sq.m
Commercial Potential	Good Frontage to the Colliers Wood Underground Station , adjacent to the Priory Retail Park and close to the Sainsbury's and Marks & Spencer complex.
Likely Type of Development	The site could occupy a high density development, with the precedent for a tall building on the site having been set by the former development on the site. Focus on retail and leisure development
Development Constraints	The site requires demolition. The site is within the floodplain and measures to mitigate against flood risk may be required. Development will require cooperation from the retail park owners.
Possible Alternative Uses	Offices
Access	From Christchurch Road, to the south of the site.
Overall Development Prospects	Reasonable

SITE CW2: 2-34 CHRISTCHURCH ROAD (UDP3CW)

This site is currently the entrance to the Colliers Wood Underground Station and a parade of retail units. The site area is 0.22 ha. It is allocated in the LB Merton UDP for a mix of uses including retail, community, public open space and a transport building.

Evaluation Criteria	Comment
Availability	Long Term
Scale of Development (retail/leisure/community/cultural)	Small scale – approximately 1,300 sq.m
Commercial Potential	Main transport Interchange in the centre.
Likely Type of Development	Transport Interchange with complementary retail uses.
Development Constraints	The site contains a listed building. Redevelopment will need to provide an entrance to the underground station.
Possible Alternative Uses	Community uses or offices.
Access	Access will remain via Christchurch Road.
Overall Development Prospects	Reasonable as park of wider redevelopment , i.e. Site CW1 and Priory Retail Park

SITE CW3: 182-192 HIGH STREET COLLIERS WOOD (UDP5CW)

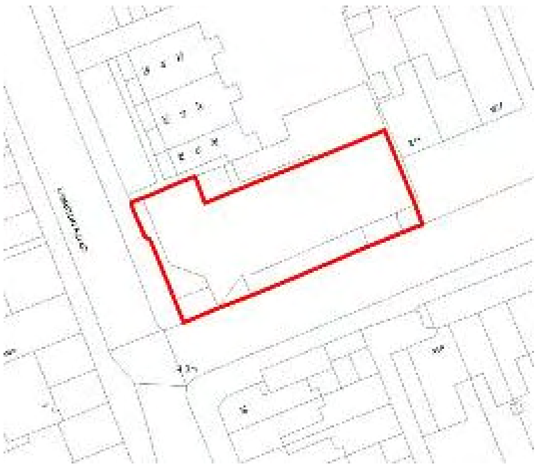
This site is opposite the entrance to the Colliers Wood Underground Station. It is currently occupied by a small parade of retail units with residential uses above. Part of the site to the south west is vacant.

The site area is 0.21ha.

It is allocated in the LB Merton UDP for environmental improvement works around Baltic Close/Oslo Court incorporating pedestrian access into Wandle Park. Junction and public transport improvements/ tramlink.

Evaluation Criteria	Comment
Availability	Short to medium Term
Scale of Development (retail/leisure/community/cultural)	Small scale – approximately 1,000 sq.m
Commercial Potential	Good location opposite underground station.
Likely Type of Development	Mix use commercial and residential development incorporating a pedestrian access route from the High Street through to Wandle Park.
Development Constraints	Various different ownerships may prohibit development being bought forward in the short term. The site is within the floodplain and measures to mitigate against flood risk may be required.
Possible Alternative Uses	Community uses or retention of existing offices.
Access	Access will remain via High Street
Overall Development Prospects	Reasonable : reliant on site acquisition.

SITE RP1: LAND AT LAMBTON ROAD/WORPLE ROAD, RAYNES PARK



A small vacant plot of land on the junction of Lambton Road and Worple Road is currently being redeveloped. The site is within the local centre boundary but is not part of the designated shopping frontage. The site area is approximately 0.08 hectares.

Evaluation Criteria	Comment
Availability	Short term
Scale of Development (retail/leisure/community/cultural)	Small scale. Permission has been granted for a part three, part four storey building with basement level car parking to provide nine flats on the upper floors and an A1 retail unit (384 sq.m gross) at ground floor level (ref. 09/P1005)
Commercial Potential	Located away from the main retail area but close to existing retail uses on Lambton Road.
Likely Type of Development	Small unit shop.
Development Constraints	The site is within the floodplain and measures to mitigate against flood risk may be required.
Possible Alternative Uses	N/A
Access	Access from Lambton Road and Worple Road.
Overall Development Prospects	Good

SITE RP2: CAR REPAIR GARAGE, PEPYS ROAD/WYKE ROAD, RAYNES PARK

A small corner site on Pepys Road and Wyke Road is currently occupied by a relatively unattractive car MOT/repair garage. The site is within the local centre boundary but is not allocated for development.

Evaluation Criteria	Comment
Availability	Short to medium term
Scale of Development (retail/leisure/community/cultural)	Small scale - approximately 300 sq.m gross at ground floor level..
Commercial Potential	Secondary area away from the core shopping area within the local centre. However, the site has good frontage on to Pepys Road.
Likely Type of Development	The site could be suitable for small Class A1 retail or Class A2/A3/A4/A5 units with residential above.
Development Constraints	The site's secondary location may be unattractive for retailers. The intentions of the existing land owner are not known.
Possible Alternative Uses	Retention of existing garage use or residential development.
Access	Existing access.
Overall Development Prospects	Reasonable

SITE RP3: LAND BOUNDED BY DURHAM ROAD, COOMBE LANE AND AMITY GROVE

The site currently contains a mix of uses, including doctors surgery, post office, Co-op foodstore, retail, offices and residential use. The existing buildings on site are dated and of poor configuration, and the site could be consolidated and comprehensively be redeveloped. We understand that the doctors surgery and clinic are being relocated. The site is within the local centre boundary and the Coombe Lane frontage is a defined shopping frontage. The site measures approximately 0.5 hectares.

Evaluation Criteria	Comment
Availability	Medium to long term.
Scale of Development (retail/leisure/community/cultural)	Medium scale – approximately 3,500 sq.m gross at ground floor level. The existing building at the corner of Coombe Lane and Amity Grove is six storeys tall.
Commercial Potential	Within main shopping area.
Likely Type of Development	Class A1 retail at ground floor level, potentially including a replacement foodstore, and/or a mix of Class A2/A3/A4/A5. Offices, leisure or residential above.
Development Constraints	Land assembly potentially difficult due to multiple ownerships.
Possible Alternative Uses	Retail in current uses, redevelop doctors surgery and clinic for residential use.
Access	Access from Durham Road/Amity Grove.
Overall Development Prospects	Reasonable

SITE WV1: 80-86 HIGH STREET, WIMBLEDON VILLAGE

These units present a single storey break in the frontage to the High Street, with three and four storey buildings either side.

Evaluation Criteria	Comment
Availability	Medium term
Scale of Development (retail/leisure/community/cultural)	No potential to increase retail floorspace at ground level but could add office or residential uses above.
Commercial Potential	Within prime retail location.
Likely Type of Development	Two-three additional storeys above ground floor for office or residential use.
Development Constraints	Located within conservation area. There may be practical limitations to extending above the existing buildings, and their loss for complete redevelopment may be resisted. Multiple land ownership may also constrain development.
Possible Alternative Uses	Retain as existing.
Access	Access to the rear from High Street Mews.
Overall Development Prospects	Poor

SITE MP1: THE EARL BEATTY AND POLICROM HOUSE, MOTSPUR PARK

The site currently contains The Earl Beatty Public House and car park, and Haynes Graphic Arts Ltd office/workshop. The site could be redeveloped for more intensive use. The site measures approximately 0.2 hectares.

Evaluation Criteria	Comment
Availability	Medium term
Scale of Development (retail/leisure/community/cultural)	Medium scale – up to 1,500 sq.m gross
Commercial Potential	Highly visible site at junction of Station Road and West Barnes Lane.
Likely Type of Development	Retail/pub/commercial at ground floor with office/ residential above.
Development Constraints	Loss of the pub may be resisted as it provides an important community facility for Motspur Park. Parking may also need to be retained. Potential flood risk issues.
Possible Alternative Uses	Retain as existing uses.
Access	Existing access from Station Road constrained, alternative access from West Barnes Lane.
Overall Development Prospects	Poor

SITE AR1: FORMER WIMBLEDON PARK HALL, ARTHUR ROAD

This site on the corner of Arthur Road and The Crescent has been cleared for redevelopment. permission has been granted for a new community hall, cafe, office suite and 14 flats (ref. 06/P1969), with a current application to amend the scheme and increase the number of flats to 20 (ref. 10/P3061). The site area is approximately 0.05 hectares.

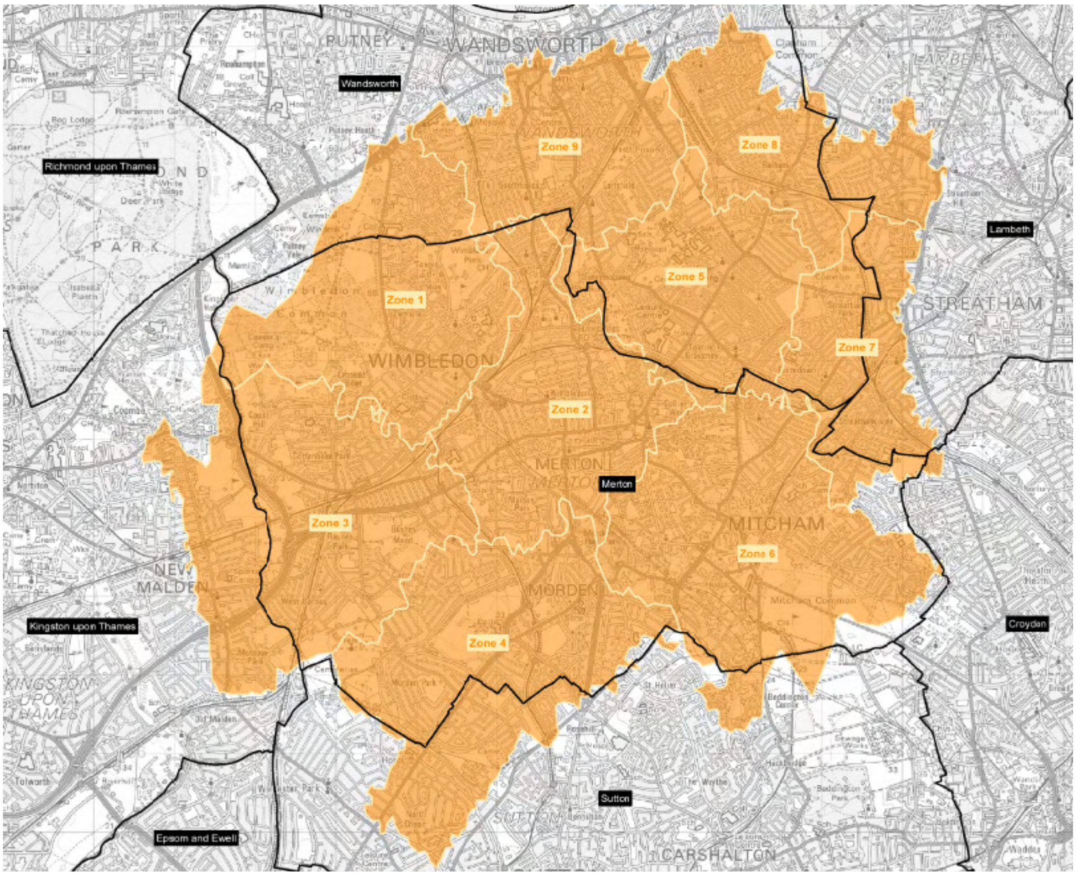
Evaluation Criteria	Comment
Availability	Short term
Scale of Development (retail/leisure/community/cultural)	Small scale community and office use.
Commercial Potential	Located in the defined local centre boundary, with commercial uses surrounding the site.
Likely Type of Development	Community and office use.
Development Constraints	N/A
Possible Alternative Uses	N/A
Access	Access from new access road off The Crescent.
Overall Development Prospects	Good

Appendix 8 Household Survey Results

8.0 # Household Survey

Survey Structure

8.1 NEMS Market Research carried out a telephone survey of 1,000 households across the London Borough of Merton study area in October/November 2010. The study area, was split based on individual postcode sectors within the study area, and the results amalgamated to create nine zones as shown below.



8.2 The number of interviews undertaken in each postcode sector reflects the population in each sector in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and top up grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items; and
  - Other non-food items (e.g. books, CDs, DVDs, toys and gifts).

- Leisure activities, including cinemas, theatre, pub/bars, restaurant, nightclubs, bingo, health clubs and ten-pin bowling.

Food and Grocery Shopping

Main Food Shopping

8.3 Large food stores are the main destination for respondents' last main food shopping trip across the study area. Overall, the Sainsburys at Merton High Street, Colliers Wood was the most popular shopping destination (11.2%), followed by Sainsburys, Balham High Road, Balham (7.8%), Tesco, Beverley Way, New Malden (7.0%) and Sainsburys Garratt Lane, Wandsworth (6.4%) for the study area as a whole, though different zones recorded different responses as the most popular destination for their main food shopping trip:

- **Zone 1 – Wimbledon West:** Sainsburys, Worple Road, Wimbledon (26.4%), followed by Marks & Spencer, Centre Court, Wimbledon (8.3%), Morrisons, The Broadway, Wimbledon and Asda, Roehampton Vale (6.9% each);
- **Zone 2 – East Wimbledon/Colliers Wood:** Sainsburys, Merton High Street, Colliers Wood (28.4%), followed by Tesco, Beverley Way, New Malden and the Internet (10.1% each);
- **Zone 3 – Raynes Park/East Kingston:** Tesco, Beverley Way, New Malden (31.1%), followed by Waitrose, High Street, New Malden (12.3%) and Morrisons, The Broadway, Wimbledon (9.4%);
- **Zone 4 – North Sutton:** Tesco, Oldfields Road, Sutton (27.4%), followed by Sainsburys, London Road, North Cheam (21.4%) and Tesco, Beverley Way, New Malden (13.7%);
- **Zone 5 – Tooting:** Sainsburys, Tooting High Street (20.1%) followed by Sainsburys, Balham High Road (15.1%) and Sainsburys, Merton High Street, Colliers Wood (13.7%);
- **Zone 6 – Mitcham:** Morrisons, St Marks Road, Mitcham (25.9%), followed by Sainsburys, Merton High Street, Colliers Wood (23.7%) and Asda, Marlowe Way, Croydon (9.6%);
- **Zone 7: – Streatham:** Sainsburys. Streatham High Road, Streatham (29.5%), followed by Sainsburys, Tooting High Street and Sainsburys, Merton High Street, Colliers Wood(8.4% each);
- **Zone 8: – Balham/Clapham:** Sainsburys, Balham High Road (41.3%), followed by Waitrose, Balham High Road (11.6%) and Asda, Lavender Hill, Clapham Junction (606%); and
- **Zone 9: – Wandsworth:** Sainsburys Garratt Lane, Wandsworth (46.2%); followed by Waitrose, Southside Shopping Centre, Wandsworth (14.2%).

8.4 Overall, 5.5% of respondents chose to do their last main food shopping on the internet and have it delivered, which is higher than the average derived from similar NLP surveys across the Country (1.5%), and this may be due to higher than average levels of internet access in London Borough of Merton, and a slightly lower than national average proportion of households without a car.

Mode of Travel for Main Food Shopping

8.5 In the whole study area, 58.7% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is significantly lower than the NLP average derived from similar surveys across the country (74.6%). A significantly higher proportion walk to their main food shopping destination (20.4%) which is higher than the NLP average of 11.7%, and again a higher proportion of households travel by bus (11.5%) compared to the NLP averages derived from other surveys of 8.6%. The number of all respondents (1.2%) using a bike to travel to their last main shopping location is also higher than the NLP average of 0.5%. These differences when compared with NLP's national average generally reflect higher levels of public transport usage within major cities and metropolitan authorities when compared with rural districts with market towns.

Top-Up Food Shopping

8.6 Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Overall 82% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips.

8.7 The overall results show that, while the main food stores remain dominant, top-up shopping trips are dispersed over a larger number of stores, with the most popular two stores overall – Sainsbury, Balham High Road and Morrisons, St Marks Road, Mitcham – accounting for just 3.7% and 2.5% of trips respectively. "Local shops" in the Study Area account for 23.9% of all responses.

Non-Food Shopping

8.8 Respondents were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, Wimbledon was the most popular destination with 20.1% of all respondents shopping there, followed by Sutton (11.8%), Kingston (11.5%) and various Central London locations, including Westfield (8.5%).

8.9 Wimbledon is only the most popular destination for non-food shopping in the East Wimbledon/Colliers Wood (52.3%), West Wimbledon (41.7%). Raynes Park/East Kingston (34.9%) and Wandsworth (26.4%) zones once the results are broken down, and is the second most popular destination in the Tooting zone (16.5%). Croydon is the most popular destination in the Streatham (41.1%) and Mitcham (24.4%) zones. Sutton is the most popular destination in the North Sutton zone (56.4%), Tooting is the most popular destination in the Tooting zone (20.9%), and Balham is the most popular destination in the Balham/Clapham zone (17.4%). Other large centres outside the Borough are popular destinations, including Kingston which is the second preference in the Wimbledon West, East Wimbledon/Colliers Wood, Raynes Park/East Kingston and North Sutton zones. Overall 3.7% of respondents buy their non-food shopping on the internet or have it delivered. The Wimbledon West zone has the highest proportion of respondents who buy most of their non-food shopping on the internet/have it delivered (9.7%).

Mode of Travel for Non-Food Shopping

8.10 The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 42.3% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was by bus/coach (22.5%) followed by walking (12.6%).

Non-Food Shopping Destinations

8.11 The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping.

8.12 **Clothing/footwear**: the most popular destination was Wimbledon (16.4%), followed by Kingston (12.2%), Central London locations including Westfield (10.4%) and Sutton (10.3%). Wimbledon was the most popular destination in the Wimbledon West (34.7%) and East Wimbledon/ Colliers Wood (43.1%) zones. Kingston was the most popular destination in the Raynes Park/East Kingston zone (40.6%), and combined Central London locations including Westfield were the most popular in the Tooting (20.7%), Balham/ Clapham (24.0%) and Wandsworth (18.7%) zones. Sutton was the most popular destination in the North Sutton (49.6%) and Mitcham (20.0%) zones, and Croydon was the most popular destination in the Streatham zone (40.0%). 7.9% of respondents last bought clothes and footwear on the internet/mail order.

8.13 **Electrical goods**: 14.4% of respondents last purchased domestic electrical appliances such as fridges or kitchen items on the internet, and this was the most popular response in the East Wimbledon/Colliers Wood (16.5%), North Sutton (17.1%), Tooting (17.3%) and Balham/Clapham (24.0%) zones. Wimbledon was the most popular destination in the Wimbledon West zone (29.2%), although the internet also scored highly in this zone (20.8%). Croydon was the most popular destination in the Mitcham (19.3%) and Streatham (25.3%) zones, and Kingston was the most popular destination in the Raynes Park/East Kingston (27.4%) and Wandsworth (19.8%) zones.

8.14 The internet was also the most popular response as the location respondents last bought other kinds of electrical goods, such as TVs, Hi-Fis and computers, with 15.2% of all respondents, and was the most popular choice for the Wimbledon West (19.4%), East Wimbledon/Colliers Wood (19.3%), Tooting (18.0%) and Balham/Clapham (18.2%) zones. For the other zones, the most popular destinations were Kingston (Raynes Park/East Kingston zone, 32.1%), Sutton (North Sutton zone, 23.9%), Colliers Wood (Mitcham zone, 17.0%), Croydon (Streatham zone, 18.9%) and Wandsworth (Wandsworth zone, 15.1%).

Wimbledon was the second most popular destination after the internet in the Wimbledon West zone (18.1%) and third most popular (after Kingston) in the East Wimbledon/Colliers Wood zone (15.6%).

8.15 **Furniture/Furnishings/Floor coverings**: Croydon was the most popular destination (16.1% of all respondents), and was the most popular destination in the East Wimbledon/Colliers Wood (16.5%), North Sutton (20.6%), Tooting (14.4%), Mitcham (28.1%), Streatham (23.2%), Balham/ Clapham (14.9%) and Wandsworth (11.2%) zones. Kingston was the most popular destination in the Wimbledon West (19.4%) and Raynes Park/East Kingston (29.2%) zones. 5.0% of respondents last bought furniture, soft furnishings or floor coverings on the internet/mail order.

8.16 **DIY/Hardware/Garden items:** the most popular destination in the study area respondents last shopped at was Wandsworth (16.4%) and this was the most popular destination in the Tooting (28.8%), Balham/Clapham (48.8%) and Wandsworth (49.0%) zones. Wimbledon was the most popular destination for 10.7% of respondents, and the most popular in the Wimbledon West (29.2%) and East Wimbledon/Colliers Wood (32.1%) zones, although it is likely that this includes some responses that should be attributed to the out of centre retail warehouses in the Borough. For the other zones, the most popular destinations were New Malden (Raynes Park/East Kingston zone, 48.1%), Sutton (North Sutton zone, 41.0%), Croydon (Mitcham zone, 17.8%) and Streatham (Streatham zone, 40.0%). Only 1.0% of respondents last bought DIY/hardware and garden items on the internet/mail order.

8.17 **Pharmaceutical/Health/Beauty items:** Wimbledon was the most popular destination (17.8%), followed by Balham (8.8%) and Wandsworth (8.7%). Wimbledon was the most popular destination in the Wimbledon West (65.3%), East Wimbledon/ Colliers Wood (56.9%) and Raynes Park/East Kingston (32.1%) zones. For the other zones, the most popular destinations correspond with their nearest centre. 1.0% of respondents last bought pharmaceutical, health and beauty items on the internet/mail order.

8.18 **CDs, toys and gifts**: 27.3% of all respondents last bought these items on the internet. Wimbledon was the most popular destination in the Wimbledon West (38.9%), East Wimbledon/Colliers Wood (39.5%) and Raynes Park/East Kingston (34.9%) zones while Sutton was the most popular in the North Sutton zone (35.0%) and Wandsworth was the most popular in the Wandsworth zone (28.3%).

8.19 Table 1 shows the shopping destination with the highest proportion of respondents for each comparison goods category in each zone. This indicates broadly where people prefer to shop for each type of goods and allows comparison between each zone.

Table 8.1 Destinations with Highest Proportion of Responses

Zone	Wimbledon West	East Wimbledon / Colliers Wood	Raynes Park/East Kingston	Mitcham	North Sutton	Tooting	Streatham	Balham/ Clapham	Wandsworth
Clothing/ Footwear	Wimbledon	Wimbledon	Kingston	Sutton	Sutton	Central London	Croydon	Central London	Central London
Domestic Appliances	Wimbledon	Internet	Kingston	Croydon	Internet	Internet	Croydon	Internet	Kingston
Electrical Goods	Internet	Internet	Kingston	Colliers Wood	Sutton	Internet	Croydon	Internet	Wandsworth
Furniture/ Carpets	Kingston	Croydon	Kingston	Croydon	Croydon	Croydon	Croydon	Croydon	Croydon
DIY/ Hardware	Wimbledon	Wimbledon	New Malden	Croydon	Sutton	Wandsworth	Streatham	Wandsworth	Wandsworth
Chemist/ Beauty	Wimbledon	Wimbledon	Wimbledon	MItcham	Sutton	Tooting	Streatham	Balham	Wandsworth
Books/CDs Toys/Gifts	Wimbledon	Wimbledon	Wimbledon	Internet	Sutton	Internet	Internet	Internet	Wandsworth

Source: NEMS Household Survey, October/November 2010

Town/District Centre Performance

8.20 Residents were asked if there was anything that would make them visit the town and district centres in the Borough more often.

Wimbledon

8.21 Over 56% of respondents stated that "nothing in particular" or that they did not know what would make them visit Wimbledon town centre more often. Issues relating to the number, type, range and quality of shops were raised by 25.0% of all respondents, the highest number of which stated the "better choice of shops in general" (12.5%). Car parking issues were raised by 17.2% of respondents, with 10.9% stating "more car parking" and 5.8% stating free/cheaper parking. Other responses to this question included more traffic free areas/pedestrianisation (6.0%), improved bus services/transport services/ links (3.2%), fewer roadworks/improve access/traffic congestion (3.1%) better maintenance/cleanliness (1.4%).

Morden

8.22 Overall, 82.1% of respondents stated that "nothing in particular" or that they did not know what would make them visit Morden district centre more often. Issues relating to the number, type, range and quality of shops were raised by 16.4% of all respondents, the highest number of which stated the "better choice of shops in general" (11.1%). Other responses to this question included more/cheaper car parking (2.8%), better maintenance/cleanliness (1.6%) and improved bus services (1.0%).

Mitcham

8.23 Over 87% of respondents stated that either "nothing in particular" or that they did not know what would make them visit Mitcham district centre more often. Issues relating to the number, type, range and quality of shops were raised by 9.8% of all respondents, and more car parking was raised by 2.1% of all respondents.

Colliers Wood

8.24 Nearly 87% of respondents stated that either "nothing in particular" or that they did not know what would make them visit Colliers Wood more often. Issues relating to the number, type, range and quality of shops were raised by 7.8% of all respondents.

Leisure Activities

Cinema

8.25 Respondents were asked if they went to the cinema and if so which cinema they last visited. 73.6% of respondents indicated they visit the cinema, which was the third most popular leisure activity after going to restaurants and to the theatre. This is higher than NLP's average derived from similar surveys across the Country (51.0%), which is likely to be due to the accessibility of cinemas in centres/close to public transport. Of those respondents that visited the cinema, the most popular destination was Wimbledon (41.4%) followed by Wandsworth (16.0%).

Theatre

8.26 Nearly 76% of respondents indicated they visited theatres, and this is the second most popular leisure activity. This figure is higher than NLP's average for other surveys of 42.5%, primarily due to the proximity of London's West End and the presence of a theatre in Wimbledon town centre. When asked where they last visited the theatre, Central London was the most popular location accounting for 55.1 % of those respondents that did visit theatres in the catchment area. The second most popular destination was Wimbledon (31.3%).

Pubs/Bars

8.27 The household survey asked respondents if and where they or their family last visited a pub/bar and 62.4% of respondents indicated that they visit pubs/bars, which is higher than the NLP average from other surveys (47.5%). Overall, Wimbledon was the most popular last destination for respondents who visit pubs and bars (23.9%), although generally the last destination for respondents who visit pubs and bars accords with the closest main centre within each zone. 12.5% of respondents had last visited pubs and bars in Central London.

Restaurants

8.28 Overall, 87.7% of respondents indicated they visit restaurants, which was the most popular leisure activity, and this is higher than the NLP average for other surveys (67.9%). Of all respondents who visited restaurants, Wimbledon attracted the highest proportion of respondents (24.4%) followed by Central London locations (12.9%).

Nightclubs

8.29 Only 11.9% of respondents indicated that they had visited nightclubs, and the sample for nightclub visitors within each zone is relatively small. However, this participation rate is slightly above the figure derived by NLP's average from other similar surveys of 9.9%. The main location for respondents who visit nightclubs in the study area as a whole is Central London (31.9%), followed by Wimbledon and Sutton (9.2% each).

Bingo

8.30 Bingo facilities were visited by just 5.7% of respondents, which is the least popular leisure activity. This figure is similar to NLP's average participation rate of 5.1% as derived from other similar surveys. The sample for bingo visitors within each zone is again relatively small. Tooting was the most popular last place respondents went to play bingo (22.8%) followed by Streatham (12.3%).

Health and Fitness Clubs

8.31 34.6% of respondents indicated their household visit health clubs/gyms, which is higher than the NLP average participation rate from other surveys (25.6%). The main health club/gym destinations for respondents were facilities in Wimbledon (22.8%) and Wandsworth (9.5%).

Tenpin Bowling

8.32 Overall 25.4% of respondents indicated their household visit tenpin bowling facilities, which is higher than the NLP average for other surveys (18.1%). The main destinations for tenpin bowling are Raynes Park (22.0%) followed by Croydon (12.6%).

Appendix 9 In-street Survey Results

9.0 Street Survey of Visitors to Main Centres

9.1 A street survey of 306 visitors was undertaken within the four main shopping centres, with 149 interviews in Wimbledon town centre, 54 interviews in Morden, 50 interviews in Mitcham and 53 interviews in Colliers Wood.

9.2 The survey was undertaken to provide information on the role each town centre plays, and the reasons why visitors come to each centre. Visitors were also asked a range of questions relating to their use of the centre and their views on how the centres could be improved. These results have provided valuable information, which has been used in the town centre health checks undertaken in this study. The respondents were asked:

- the purpose of their visit;
- what else they will be doing that day;
- whether they intend to do any shopping;
- what they intended to buy;
- how much they would spend in the centre;
- do they intend to visit any leisure/entertainment facilities or eat/drink in the centre;
- how they travelled to the centre;
- which other shopping destination they visited regularly;
- how long they intended to stay in the centre;
- how often they shop in the centre;
- how they rated different aspects of the centre;
- what improvements they would like to see;
- if they visit the centre in the evenings; and
- the main factors they liked about leisure/pubs and bars/restaurants in the centre.

Main Purpose of Visit to the Centres

9.3 The in-street survey results are not directly comparable with the household survey. The in-street surveys were undertaken during the daytime and interviews were conducted in the main shopping areas and therefore the result may overstate the importance of shopping and understate other reasons for visiting the town centres.

9.4 Notwithstanding the above, the main purpose for visiting Wimbledon town centre (43.6%) and Mitcham district centre (56.0%) was to undertake food shopping (20.0%). Non-food shopping only was the main purpose for visits to Colliers Wood (37.7%). For Morden, the main purpose for visiting was for work/business purposes (24.1%), followed by food shopping (22.2%). Mitcham had the highest proportion of the main purpose of the visit to use services, e.g. bank, post office, hairdresser (20.0%). Wimbledon had the highest proportion of respondents using the centre for social/leisure purposes (12.8%), however as indicated above the proportion of leisure related visitors has probably been understated in the survey results.

Table 1: Main Purpose of Visit to Centre

Reason for Visit	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
Shopping for food only	43.6	22.2	56.0	7.5
Shopping for non-food goods only	8.1	1.9	4.0	37.7
Shopping for both food and non-food	5.4	18.5	4.0	11.3
Window shopping	6.0	0.0	0.0	1.9
To visit the market	0.0	0.0	0.0	0.0
To visit a restaurant/ café/public house	1.3	0.0	4.0	0.0
To have a walk/stroll around	0.0	1.9	0.0	1.9
To use services eg. bank, PO, hairdresser	8.7	11.1	20.0	0.0
Work/business purposes	7.4	24.1	4.0	11.3
Healthcare eg. doctor, dentist, optician	2.7	3.7	4.0	1.9
Social/leisure eg. meeting friends, gym	12.8	5.6	0.0	7.5
Tourism, eg. holiday, day trip	0.7	0.0	0.0	0.0
Christmas shopping	0.0	0.0	0.0	11.3
Education	0.0	0.0	4.0	1.9
Live in area	0.0	1.9	0.0	3.8
To use public transport	1.3	9.3	0.0	1.9
Nothing/nothing else	1.3	0.0	0.0	0.0
Don't know	0.7	0.0	0.0	0.0

Source: Question 1, NEMS Survey, November2010

N.B – May not sum to 100% as more than one response may be given

Other Purpose of Visit

9.5 Respondents were asked what else they would be doing in the centre, aside from the main purpose of their visit. In each centre, the most common response was either that they would be doing nothing other than the main purpose for their visit or that they did not know. The next most popular responses in Wimbledon were to use services (7.4%) and to visit a restaurant/ café/public house (6.7%). In Morden, the next most popular response was shopping for food only (14.8%). In Mitcham, other popular responses were to use services (16.0%) and window shopping (8.0%). In Colliers Wood, shopping for non-food goods only was the next most popular response (5.7%).

Intended Visitor Purchases

9.6 Of those respondents who intended to purchase goods during their visit, 68.5% intended to buy food and grocery items. This figure was highest in Mitcham (85.0%) and lowest in Colliers Wood with 30.4% of respondents. The intended purchases of respondents are shown in Table 2.

Table 2: Intended Purchases

Intended Purchases	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
Food and groceries	72.9	83.8	85.0	30.4
Newspapers/ magazines	10.2	16.2	2.5	2.2
Confectionery/tobacco	5.1	5.4	0.0	2.2
Clothing/footwear	15.3	2.7	2.5	43.5
Furniture/carpets/soft furnishings	1.7	0.0	0.0	2.2
Domestic electrical goods	0.0	5.4	2.5	17.4
Other electrical goods (TV, hi-fi etc)	3.4	2.7	0.0	6.5
DIY/hardware/gardening	0.0	5.4	0.0	2.2
Other household goods	0.9	2.7	2.5	6.5
Gifts/jewellery/china and glass	1.7	0.0	0.0	6.5
Books/CDs/videos/toys/ hobbies	1.7	2.7	5.0	13.0
Health/beauty/chemist items	2.5	10.8	7.5	13.0
Other	0.9	2.7	0.0	2.2
Don't know	10.2	2.7	2.5	0.0

Source: Question 2, NEMS Survey, November2010

N.B – May not sum to 100% as more than one response may be given

9.7 In Wimbledon, Morden and Mitcham, most people intended to buy food and groceries. In Colliers Wood, clothing and footwear (43.5%) was the main intended purchase, followed by food and groceries (30.4%). A significant proportion of respondents in Colliers Wood intended to buy domestic electrical goods (17.4%), books/CDs/videos/toys/hobbies and health/beauty/chemist items (13.0% each). Clothing and footwear was the second most popular response in Wimbledon (15.3%). In Morden a significant proportion of respondents stated newspapers and magazines (16.2%) as their second intended purchase.

Expenditure During Visit

9.8 Visitors were asked to estimate how much they would spend during their visit to the centres. The results are shown in Table 3 and 4. The average spend on food shopping is highest in Mitcham district centre (£53.4), followed by Wimbledon (£50.0). Morden (£14.1) and Colliers Wood (£8.2) have a significantly lower average spend for food shopping.

Table 3: Food and Grocery Expenditure within the Centres

Food and Grocery Expenditure	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
Nothing	16.9	18.9	0.0	50.0
Less than £5.00	2.5	5.4	2.5	2.2
£5.01-£10.00	2.5	21.6	15.0	6.5
£10.01-£20.00	13.6	21.6	12.5	8.7
£20.01-£30.00	5.1	8.1	5.0	4.3
£30.01-£40.00	5.9	0.0	0.0	2.2
£40.01-£50.00	6.8	5.4	7.5	0.0
£50.01-£75.00	5.9	0.0	10.0	4.3
£75.01-£100.00	17.8	2.7	15.0	0.0
£100.01-£150.00	4.2	0.0	12.5	0.0
More than £150	4.2	0.0	0.0	0.0
Don't know/refused	14.4	16.2	20.0	21.7
Average per visitor (£)	**50.0**	**14.1**	**53.4**	**8.2**

Source: Question 3 NEMS Survey, November 2010

9.9 The average non-food spend in Colliers Wood (£72.2) was significantly higher than Wimbledon (£15.3), Mitcham (£14.5) and Morden (£7.9) as shown in Table 4.

9.10 All the centres had a low average spend per visitor for eating and drinking out, as set out in Table 5. However, it should be noted that only respondents who stated that they would be shopping during their visit were asked these questions, and as such the spending on eating/ drinking out will be underestimated, and accounts for the high proportion of respondents who answered that they would not be spending anything. In addition, as indicated earlier this daytime survey has under-estimated the importance of eating and drinking out in the centres.

Table 4: Non-Food Expenditure within the Centres

Non Food Expenditure	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
Nothing	35.6	18.9	5.0	4.3
Less than £5.00	11.0	5.4	5.0	0.0
£5.01-£10.00	7.6	10.8	7.5	4.3
£10.01-£20.00	5.1	5.4	7.5	8.7
£20.01-£30.00	4.2	2.7	7.5	8.7
£30.01-£40.00	2.5	0.0	5.0	6.5
£40.01-£50.00	2.5	2.7	0.0	4.3
£50.01-£75.00	0.8	0.0	0.0	17.4
£75.01-£100.00	0.0	0.0	0.0	8.7
£100.01-£150.00	1.7	0.0	0.0	10.9
More than £150	1.7	0.0	0.0	8.7
Don't know/refused	27.1	54.1	62.5	17.4
Average per visitor (£)	**15.3**	**7.9**	**14.5**	**72.2**

Source: Question 3 NEMS Survey, November 2010

Table 5: Expenditure on eating/drinking out within the Centres

Eating/Drinking Out Expenditure	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
Nothing	53.4	13.5	10.0	50.0
Less than £5.00	11.0	5.4	7.5	2.2
£5.01-£10.00	3.4	10.8	7.5	0.0
£10.01-£20.00	0.8	0.0	2.5	0.0
£20.01-£30.00	0.0	0.0	5.0	0.0
£30.01-£40.00	0.8	0.0	0.0	2.2
£40.01-£50.00	0.8	0.0	0.0	0.0
£50.01-£75.00	0.0	0.0	0.0	0.0
£75.01-£100.00	0.0	0.0	0.0	0.0
£100.01-£150.00	0.0	0.0	0.0	0.0
More than £150	0.0	0.0	0.0	0.0
Don't know/refused	27.1	70.3	67.5	45.7
Average per visitor (£)	**1.9**	**3.2**	**7.3**	**1.5**

Source: Question 3 NEMS Survey, November 2010

9.11 In all centres only a small proportion of respondents were intending to eat or drink, use leisure or entertainment facilities during their visit. In Wimbledon only 20.8% of visitors were intending to undertake such activities. The highest proportion was in Morden with 29.6% responding to partaking in such activities, while this figure was lower in Mitcham (18.0%) and Colliers Wood (15.1%). Of those who did intend to visit any leisure/entertainment facilities the most popular activity in all centres was to visit a restaurant/café.

Mode of Travel

9.12 The majority of visitors travelled to Wimbledon, Mitcham and Colliers Wood by car, while in Morden the most popular mode of travel was bus/coach. A high proportion of visitors travelled to all four centres by foot, which suggests the centres have a relatively localised catchment. A significant proportion of visitors to the all centres travelled by public transport – train/tube and bus/coach, which is to be expected in an urban location.

9.13 The in-street surveys suggest a higher proportion of visitors walk to the town centres, and a lower proportion travel by car than the household survey results, which may be explained by the higher frequency of trips made to the town centres on foot, i.e. frequent day to day trips to the town centre are more likely to be made on foot, whilst more infrequent shopping trips (eg. bulk food shopping) are made predominantly by car.

Table 6: Mode of Travel

Mode of Travel	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
Car driver	43.6	20.4	40.0	32.1
Car passenger	9.4	0.0	14.0	0.0
Bus/coach	10.1	35.2	8.0	24.5
Train/tube	9.4	11.1	0.0	11.3
Taxi	0.0	0.0	0.0	0.0
Walked	23.5	29.6	36.0	28.3
Bicycle	1.3	1.9	2.0	3.8
Mobility scooter	0.0	1.9	0.0	0.0
Tram	2.7	0.0	0.0	0.0
Other	0.0	0.0	0.0	0.0

Source: Question 6 NEMS Survey, November 2010

Other Shopping Destinations

9.14 Respondents were asked which other shopping centres they regularly use (i.e. at least every three months), as shown in Table 7. The results indicate that other shopping centres outside Merton are important alternative shopping destinations. Kingston is an important shopping destination with a total of 26.8% of respondents from all centres stating they regularly shop there, while 25.8% of all respondents regularly shop in Croydon. These results are broadly consistent with the household survey results shown in Section 5.0, which also demonstrate that few customers do all their shopping in Merton.

Table 7: Other Regular Shopping Destinations

Shopping Centre/ Town	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
No other centre	10.1	13.0	6.0	7.5
Wimbledon	n/a	44.4	42.0	47.2
Morden	0.0	n/a	0.0	5.7
Mitcham	26.2	11.1	n/a	3.8
Colliers Wood	5.4	9.3	6.0	n/a
Raynes Park	0.7	3.7	0.0	1.9
Wimbledon Village	4.0	7.4	4.0	11.3
Shannon Corner Retail Park	0.0	1.9	0.0	1.9
Out-of-centre retail parks in LB Merton	0.7	0.0	0.0	0.0
Balham	4.0	1.9	10.0	5.7
Carshalton	1.3	1.9	0.0	3.8
Central London	6.7	1.9	0.0	0.0
Clapham	5.4	1.9	10.0	5.7
Covent Garden	6.0	1.9	4.0	1.9
Croydon	21.5	18.5	54.0	18.9
Kingston	35.6	20.4	2.0	32.1
Oxford Street	7.4	5.6	6.0	9.4
Streatham	1.3	1.9	2.0	1.9
Sutton	9.4	38.9	22.0	26.4
Tooting	2.0	9.3	8.0	9.4
Wandsworth	10.7	0.0	12.0	11.3
Westfield Shopping Centre	2.0	0.0	0.0	0.0
Other	5.4	9.3	2.0	13.2
Don't know	10.7	3.7	4.0	0.0

Source: Question 7, NEMS Survey, November2010 N.B – May not sum to 100% as more than one response may be given

9.15 A high proportion of respondents in Morden (44.4%), Mitcham (42.0%) and Colliers Wood (47.2%) also stated that they regularly shop in Wimbledon, confirming the attraction of Wimbledon as the highest order centre in the Borough.

Duration of Visit

9.16 Table 8 shows the time visitors intended to spend in each centre. The highest proportion of people in Wimbledon spent 1 - 1.5 hours in the centre. In Mitcham and Colliers Wood, the highest proportion spent just 16 - 30 minutes in the centre, while in Morden the joint highest proportion spent 0 – 15 minutes and 16 – 30 minutes in the centre. Respondents spent the longest time on average in Wimbledon (86 minutes) and the least amount of time in Morden (50 minutes). The average length of stay appears to be closely linked with the range and choice of shops and services available within each town centre, ie. the more facilities the longer customers tend to stay.

Table 8: Duration of Visit

Time	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
0 - 15 min	2.70%	25.90%	10.00%	18.90%
16 - 30 min	8.70%	25.90%	32.00%	20.80%
31 min –1 hour	14.80%	24.10%	22.00%	9.40%
1 - 1½ hours	36.20%	3.70%	24.00%	18.90%
1½ - 2 hours	24.20%	7.40%	0.00%	7.50%
2 - 3 hours	8.70%	5.60%	8.00%	15.10%
Over 3 hours	4.00%	3.70%	2.00%	5.70%
Don’t know	0.70%	3.70%	2.00%	3.80%

Source: Question 8 NEMS Survey, November 2010

Frequency of Shopping

9.17 Respondents were asked how often they shop in the centres, as shown in Table 9. In Wimbledon (40.3%) and Mitcham (38.0%), the greatest frequency of visit is once a week, and in Morden (38.9%) and Colliers Wood (32.1%) a higher proportion visit 2-3 times a week. Morden had the greatest proportion of respondents visiting the centre every day (22.2%) compared to the other centres.

Table 9: Frequency of Visit

Frequency of Visit	% Respondents in Each Centre

	Wimbledon	Morden	Mitcham	Colliers Wood
Every day	8.1	22.2	12.0	13.2
2-3 times a week	26.8	38.9	34.0	32.1
Once a week	40.3	16.7	38.0	7.5
Once a fortnight	12.1	1.9	10.0	5.7
Once a month	3.4	3.7	0.0	24.5
Less than once a month	6.0	9.3	4.0	17.0
Never	2.0	7.4	2.0	0.0
Don't know	1.3	0.0	0.0	0.0

Source: Question 9 NEMS Survey, November 2010

Rating of Centres

9.18 Visitors were asked to rate each centre on a range of different factors, and the average score for each centre is shown in Table 10. Scores of under -0.5 suggest an overall rating of "poor" to "very poor" (shown in red). Scores of 0.5 to 2 suggest an overall rating of "good" or "very good". Scores of between -0.5 to 0.5 suggest a neutral rating with equal proportions rating the centre as "good" or "poor". The centres were rated as follows:

- Wimbledon - ten factors rated as "good", no factors rated as "poor";
- Morden - three factors rated as "good", six factors rated as "poor";
- Mitcham - five factors rated as "good", no factors rated as "poor";
- Colliers Wood - 11 factors rated as "good", three factors rated as "poor".

9.19 Only three factors overall were rated as "poor" in Colliers Wood – evening entertainment/leisure facilities, town centre events and public toilets. Bus services was the one factor that was rated as "good" in all four centres, while a number of factors – bus facilities (shelters), personal safety, general shopping environment and size/quality of supermarkets – were rated good in three centres. Overall Morden has the lowest average score (-0.34), while Wimbledon and Colliers Wood have the highest scores.

Table 10: How Visitors Rate Aspects of Centres

Factor	Wimbledon	Morden	Mitcham	Colliers Wood
Car parking availability	0.48	-0.24	0.46	1.03
Car parking charges	0.01	-0.08	0.44	1.00
Traffic congestion	-0.28	-0.15	-0.33	-0.37
Bus services	0.52	1.10	0.89	0.90
Bus facilities (shelters)	0.44	0.70	0.89	0.66
Personal safety	0.71	0.62	0.22	1.25
Range of shops and services available	0.64	-0.44	0.37	1.08
Quality of shops and services available	0.61	-0.20	0.31	0.98
Daytime entertainment/ leisure facilities	0.55	-0.97	0.07	-0.20
Evening entertainment/ leisure facilities	0.56	-0.68	-0.31	-0.56
Town Centre events	0.55	-0.86	-0.02	-1.10
Liveliness/street life/ character	0.48	-0.41	-0.20	0.41
Quality/number of places to eat/drink	0.64	-0.43	0.53	0.33
General shopping environment	0.65	-0.22	0.53	1.14
Planting/landscaping	0.40	-0.58	0.34	0.41
Layout of centre	0.48	-0.35	0.43	0.80
Size/quality of supermarkets	0.63	0.34	0.72	1.22
Public toilets	0.04	-1.87	-0.41	-1.00
The market	0.31	-1.86	0.08	0.54
Average Score	**0.44**	**-0.34**	**0.26**	**0.45**

Source: Question 10, NEMS Survey, November 2010

Based on a scoring system of -2 for very poor, -1 poor, 0 neutral, 1 good and 2 for very good

Green *= Good to Very Good (0.5 to 2)*

Black *= Neutral (-0.5 to 0.5)*

Red *= Poor to Very Poor (-0.5 to -2)*

9.20 Respondents were also asked what improvement they would like to see in the centres. Overall the main responses were as follows:

Table 11: Suggested Improvements

Improvement	% of Visitors	Main Centres Where Mentioned
Nothing in particular	39.9	Wimbledon (55.0%), Mitcham (30.0%), Morden (24.1%), Colliers Wood (22.6%)
Increase in range of national/ multiple chain stores	13.1	Morden (20.4%), Wimbledon (12.8%), Mitcham (12.0%)
Increase in range of local/ speciality shops	14.4	Morden (27.8%), Mitcham (12.0%), Wimbledon (11.4%), Colliers Wood (11.3%)
Improve quality of shops/ services	13.1	Morden (29.6%), Mitcham (18.0%)
Improve appearance of centre	7.2	Mitcham (10.0%), Colliers Wood (9.4%), Morden (9.3%)
Improve the market	2.9	Wimbledon (3.4%), Mitcham (4.0%)
Make centre safer (CCTV, policing, lighting etc.)	5.9	Mitcham (14.0%), Colliers Wood (9.4%), Morden (9.3%)
Remove traffic congestion	6.2	Mitcham (10.0%). Morden (7.4%)
Better entertainment/leisure facilities	5.2	Morden (13.0%), Colliers Wood (9.4%), Mitcham (6.0%)
Improve quality/range of cafés and restaurants	3.3	Morden (13.0%)

Source: Question 11 NEMS Survey, November 2010

Evening Activity

9.21 Visitors were asked whether they ever visited the centres in the evenings, as shown in Table 12. Overall only 35.6% of respondents also visited the centres in the evening. Wimbledon town centre had the highest proportion of respondents who stated that they visit the centre in the evening (45.6%). The lowest proportion was in Morden, with only 25.9% visiting the centre in the evening.

Table 12: Visit to the Centres in the Evening

Evening Visit	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
Yes	45.6	25.9	26.0	26.4
No	53.7	74.1	74.0	71.7
Don't know	0.7	0.0	0.0	1.9

Source: Question 12 NEMS Survey, November 2010

Table 13: Reasons for Visiting the Centres in the Evening

Evening Visit	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
Sports facilities	10.3	0.0	0.0	28.6
Pubs/bars	50.0	35.7	30.8	21.4
Restaurants	67.6	28.6	38.5	35.7
Services (eg. cash tills)	0.0	0.0	0.0	0.0
Takeaway food	11.8	7.1	15.4	0.0
Walk about/look around	0.0	7.1	0.0	21.4
Theatre	16.2	0.0	0.0	0.0
Nightclubs	1.5	0.0	0.0	0.0
Church	0.0	0.0	7.7	7.1
Cinema	22.1	0.0	0.0	7.1
Comedy clubs	1.5	0.0	0.0	0.0
Meetings	0.0	0.0	7.7	0.0
Shopping	1.5	7.1	7.7	14.3
Visit friends/family	0.0	7.1	7.7	0.0
Work	0.0	7.1	0.0	0.0
Other	0.0	0.0	0.0	0.0
Don't know/varies	1.5	0.0	0.0	7.1

Source: Question 13 NEMS Survey, November 2010

N.B – May not sum to 100% as more than one response may be given

9.22 The main reasons most respondents visited the four centres in the evening was to go to pubs/bars (42.2%) and restaurants (55.1%). Over 67% of respondents visited Wimbledon during the evening, with most visiting restaurants. A significant proportion also visited Wimbledon in the evening to go to the cinema (22.1%) and to the theatre (16.2%). In Colliers Wood, a significant proportion of those visiting the centre in the evening do so to use sports facilities.

9.23 Visitors were asked what they liked and disliked about the leisure, pub and bars and restaurant facilities in the centre, as shown in Tables 14 and 15.

Table 14: Likes about Leisure/Pubs and Bars/Restaurant Facilities

Likes	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
Nothing in particular	48.3	20.4	32.0	15.1
Close to home/easy to get to	24.2	13.0	22.0	9.4
Good theatre	6.0	0.0	0.0	1.9
Good choice of restaurants	14.1	1.9	18.0	7.5
Good quality of restaurants	4.7	5.6	8.0	3.8
Good quality of pubs/bars	2.0	5.6	2.0	0.0
Good choice of pubs/bars	0.7	0.0	2.0	0.0
Good health and fitness facilities	0.7	0.0	2.0	3.8
Cleanliness	0.0	0.0	0.0	1.9
Close to work	0.0	0.0	0.0	1.9
Facilities close together/compact	0.7	0.0	0.0	0.0
Friendly environment	0.0	1.9	0.0	0.0
Good cinema	1.3	0.0	0.0	0.0
Good leisure playground	0.0	0.0	0.0	1.9
Not too busy	0.7	0.0	0.0	1.9
Reasonable prices	0.0	0.0	0.0	1.9
Spacious	0.7	0.0	0.0	0.0
Varied choice	2.0	0.0	0.0	0.0
Other	0.0	0.0	0.0	0.0
Don’t know	5.4	0.0	6.0	1.9
Don’t visit these places in study area	2.0	53.7	26.0	54.7

Source: Question 14 NEMS Survey, November 2010

N.B – May not sum to 100% as more than one response may be given

9.24 A relatively high proportion of respondents overall (35.0%) considered that there was nothing in particular that they liked about the leisure facilities in all of the centres. After “nothing in particular”, being close to home had the highest proportion of responses in all four centres. In Wimbledon and Mitcham, a significant proportion stated that there was a good choice of restaurants (14.1% and 18.0% respectively).

Table 15: Dislikes about Leisure/Pubs and Bars/Restaurant Facilities

Dislikes	% Respondents in Each Centre			
	Wimbledon	Morden	Mitcham	Colliers Wood
Nothing in particular	74.7	72.0	78.4	45.8
Poor choice of facilities	8.2	12.0	2.7	29.2
Too expensive	3.4	4.0	2.7	16.7
Unsafe/poor security/ dangerous	0.7	8.0	2.7	0.0
Lack of car parking	0.0	0.0	2.7	4.2
Car parking charges	0.7	0.0	2.7	0.0
Lack of public transport	0.0	0.0	0.0	0.0
Dislike chain pubs	2.1	0.0	0.0	0.0
No vegetarian restaurant	0.0	4.0	0.0	0.0
Poor quality atmosphere	3.4	4.0	0.0	0.0
Traffic	0.0	0.0	0.0	4.2
Other	2.1	0.0	0.0	0.0
Don't know	9.6	4.0	8.1	8.3

Source: Question 15 NEMS Survey, November 2010

N.B – May not sum to 100% as more than one response may be given

9.25 The majority of respondents suggested that they dislike nothing in particular about the leisure/restaurants/pubs and bars in all the centres. In Colliers Wood 29.2% of respondents stated that the poor choice of facilities was a reason for why they dislike visiting the leisure facilities, and this also was the second most popular dislike in Morden (12.0%) and Wimbledon (8.2%).

Appendix 10 Business Survey Results

10.0 # Business Occupier Perceptions

10.1 A random survey of business occupiers was undertaken in October/November 2010. In total 200 businesses were interviewed in London Borough of Merton, and the number of interviews were broadly proportional to the size of each centre. These were broken down as follows:

- Wimbledon Town Centre: 50 interviews;
- Morden District Centre: 30 interviews;
- Mitcham District Centre: 30 interviews;
- Colliers Wood: 30 interviews;
- Wimbledon Village Local Centre: 25 interviews;
- Raynes Park Local Centre: 15 interviews;
- North Mitcham Local Centre: 10 interviews;
- Motspur Park Local Centre: 5 interviews;
- Arthur Road Local Centre: 5 interviews.

10.2 The occupiers were asked to give their views on a number of issues, including:

- current and future trading performance;
- future plans to improve or rationalise their premises;
- which aspects of the town centre benefited businesses;
- what issues constrain the operation and performance of their business and how these could be addressed;
- how important affordable rents and premises/business rates are to their business;
- how the town centres were rated against a number of aspects; and
- opinions on shopping terms and service mix.

Length of Trading in Current Location

10.3 Table 1 shows the length of trading of the businesses surveyed in the Borough. The majority of businesses have been trading in Merton for over ten years (nearly 50%), with the average length of time 17.2 years, indicating that there are a significant proportion of well established businesses in the Borough. This is not untypical of long established shopping centres across the country.

Table 1: Length of Trading in Centre

Length	No. of Respondents	% of Respondents
Less than 1 year	7	3.5
1 – 5 years	48	24.0
6 – 10 years	39	19.5
More than 10 years	54	27.0
More than 25 years	39	19.5
More than 50 years	6	3.0
Don't know/no answer	7	3.5
Total	**200**	**100.0**

Source: NEMS Business Occupier Survey November 2010

Legal Status of Businesses

10.4 The legal status of the businesses surveyed is summarised in Table 2. In general the highest proportion of occupiers in Merton were private limited companies (37.5%). 24.5% of businesses are sole proprietorships and 15.5% are public limited companies.

Table 2: Legal Status

Legal Status	No. of Respondents	% of Respondents
A sole proprietorship	49	24.5
A partnership	27	13.5
A private limited company	75	37.5
A public limited company	31	15.5
A co-operative/social enterprise	3	1.5
A charity	6	3.0
Don't know/no answer	9	4.5
Total	**200**	**100.0**

Source: NEMS Business Occupier Survey November 2010

Future Property Requirements

10.5 Businesses were asked what current plans, if any, they had to change their business premises. The majority of occupiers in all the centres appeared to be content with their existing premises, with between 76.7% and 100.0% across the centres having no plans to change. These results suggest that most occupiers are committed to remain in the centres. A number of businesses in Morden (16.7%), Mitcham (13.3%) and Wimbledon town centre (12.0%) were looking to re-fit, extend or improve their existing properties to meet their requirements, which suggests commitment to invest and stay in the local area. Some businesses suggested they are looking to relocate to new premises in the local area i.e. three in Wimbledon town centre, two in Mitcham and one in Colliers Wood, which is again a positive indication of a commitment to stay in the local area. Very few businesses are looking to close or relocate from the local area, which is positive i.e. only one business in Wimbledon town centre, Morden, Colliers Wood and Wimbledon Village and two in Mitcham.

Trading Performance

10.6 Businesses were asked to describe their current trading performance and performance over the last 12 months, as shown in Table 4. A scoring system of 1 point for 'improved' trading, 0 points for 'stay the same' and -1 point for a 'decline' in trading is used to calculate an average. The strongest trading centre appears to be Arthur Road local centre with an average of 0.20, however this is based on a small sample size. Raynes Park and Wimbledon Village both achieved a positive score of 0.13 and 0.09 respectively. The average score for businesses in all other centres scored below zero, the lowest score being in North Mitcham (-0.56).

Table 4: Last 12 Month Trading Period

Centre	Performance (% Respondents in Each Centre)				Average Score (1 to -1)
	Improved (1)	Stayed same (0)	Declined (-1)	Don't Know / Refused	
Wimbledon	32.0	10.0	46.0	12.0	**-0.16**
Morden	13.3	40.0	46.7	0.0	**-0.33**
Mitcham	23.3	43.3	33.3	0.0	**-0.10**
Colliers Wood	23.3	23.3	50.0	3.3	**-0.28**
Wimbledon Village	36.0	28.0	28.0	8.0	**0.09**
Raynes Park	46.7	20.0	33.3	0.0	**0.13**
North Mitcham	0.0	40.0	50.0	10.0	**-0.56**
Motspur Park	20.0	20.0	60.0	0.0	**-0.40**
Arthur Road	40.0	40.0	20.0	0.0	**0.20**

Source: NEMS Business Occupier Survey November 2010

(Average score based on 1 for good, 0 for stay the same and -1 for declined)

10.7 Most occupiers in Wimbledon, Morden, Colliers Wood, North Mitcham and Motspur Park felt that trading had declined over the last 12 months, which is to be expected due to the recession. In Mitcham, the highest proportion considered performance had stayed the same, while in Arthur Road, an equal number considered business had improved and stayed the same. Raynes Park was the only centre where trading performance had improved. Opinions on expected future trading performance are summarised in Table 5. In general respondents believed that trading would improve in all centres except in Morden where more businesses expected trading to stay the same and Motspur Park where more businesses expected trading to stay the same or decline. Businesses were most optimistic in Arthur Road.

Table .5: Expected 12 Month Future Trading Period

Centre	Performance (% Respondents in Each Centre)				Average Score (1 to -1)
	Improve (1)	Stay same (0)	Decline (-1)	Don't Know / Refused	
Wimbledon	58.0	18.0	14.0	10.0	**0.49**
Morden	23.3	46.7	20.0	10.0	**0.04**
Mitcham	50.0	20.0	20.0	10.0	**0.33**
Colliers Wood	46.7	26.7	16.7	10.0	**0.33**
Wimbledon Village	56.0	20.0	20.0	4.0	**0.38**
Raynes Park	53.3	40.0	6.7	0.0	**0.47**
North Mitcham	40.0	40.0	10.0	10.0	**0.33**
Motspur Park	20.0	40.0	40.0	0.0	**-0.20**
Arthur Road	100.0	0.0	0.0	0.0	**1.00**

Source: NEMS Business Occupier Survey November 2010
(Average score based on 1 for good, 0 for stay the same and -1 for declined)

10.8 Businesses were also asked whether in general, they considered over the last year the centres had improved, stayed the same or declined. Raynes Park had the highest positive score, with 53.3% of respondents considering the centre had improved, while Motspur Park achieved the lowest overall score.

Table 6: Performance of Centres over last 12 months

Centre	Performance (% Respondents in Each Centre)				Average Score (1 to -1)
	Improve (1)	Stay same (0)	Decline (-1)	Don't Know / Refused	
Wimbledon TC	26.0	42.0	24.0	8.0	**0.02**
Morden	23.3	40.0	33.3	3.3	**-0.10**
Mitcham	26.7	26.7	36.7	10.0	**-0.11**
Colliers Wood	20.0	33.3	30.0	16.7	**-0.12**
Wimbledon Village	20.0	32.0	40.0	8.0	**-0.22**
Raynes Park	53.3	33.3	13.3	0.0	**0.40**
North Mitcham	20.0	60.0	10.0	10.0	**0.11**
Motspur Park	0.0	20.0	60.0	20.0	**-0.75**
Arthur Road	40.0	20.0	20.0	20.0	**0.25**

Source: NEMS Business Occupier Survey November 2010
(Average score based on 1 for good, 0 for stay the same and -1 for declined)

Factors Constraining Businesses

10.9 Businesses were asked the most important issues believed to constrain their operation and performance. In general the most popular responses were the availability of business and customer car parking (24.0%) and the level of trade/lack of visitors/customers (14.5%) and 8.0% of respondents stated that rents/overheads constrained their business.

Table 7: Factors constraining businesses

Factor	No. of Respondents	% of Respondents
Availability of business / customer car parking	48	24.0
Level of trade / lack of visitors / customers	29	14.5
Rents / overheads	16	8.0
Poor accessibility	11	5.5
Poor quality of the local environment	6	3.0
Quality or size of premises	5	2.5
Poor location of premises	4	2.0
Security issues (crime / vandalism)	4	2.0
Problems associated with anti social behaviour	3	1.5
Competition from other businesses in the shopping parade	3	1.5
Lack of good transport links	2	1.0
Competition from other businesses in the wider area	2	1.0
Lack of business finance	1	0.5
Advice on how to improve the operation of the business	1	0.5
Other	4	2.0
Don't know	61	30.5

Source: NEMS Business Occupier Survey November 2010

10.10 Businesses were asked how the most important constraining issues could be addressed. The most popular response overall was more parking (28.7%), followed by lower rates (13.6%) and more relaxed restrictions on parking (11.5%).

Table 8: Means to address constraints on businesses

Means to address constraints	No. of Respondents	% of Respondents
More parking	40	28.7
Lower rates	19	13.6
More relaxed restrictions on parking	16	11.5
Cheaper parking	11	7.9
More security measures (eg. CCTV, patrols)	8	5.7
Quicker roadworks	7	5.0
More advertising / better promotion of the area	7	5.0
Redevelopment of the whole area	6	4.3
Relocate	5	3.6
Introduce a greater variety of retailers to the area	5	3.6
Better channels of communication between the local authority and business	4	2.8
Better traffic management / layout	3	2.1
Less local authority legislation	3	2.1
More access for deliveries	2	1.4
Introduce more quality retailers	2	1.4
Fill vacant units	2	1.4
Refit the premises	2	1.4
More support for business	1	0.7
Clean-up local area	1	0.7
Revise business plan	1	0.7
Don't know	17	12.2

Source: NEMS Business Occupier Survey November 2010

Importance of Affordable Rents and Premises/ Business Rates

10.11 Businesses were asked to rank in terms of importance the factors that contributed to the choice of location when the business started up. A scoring system of 2 points for ‘very important’, 1 point for ‘quite important’ and 0 points for ‘not important’ is used to calculate an average.

Table 9: Factors contributing to choice of location

Factor	Performance (% respondents overall)				Average Score (0 to 2)
	Very important (2)	Quite important (1)	Not important (0)	Don't Know / Refused	
Affordable rents and premises	35.0	22.5	9.5	33.0	**1.38**
Affordable business rates	35.5	22.0	8.0	34.5	**1.42**
Quality of premises	34.0	25.0	8.5	32.5	**1.38**
Good business location	53.0	12.5	3.5	31.0	**1.72**

Source: NEMS Business Occupier Survey November 2010

10.12 Overall, good business location was the most important factor contributing to the choice of location. Business location generally relates to the prominence of the shop unit within the centre i.e. with good frontage and pedestrian footfall.

Aspects of Centres Benefiting Businesses

10.13 Occupiers were asked if a number of aspects within the centres benefited their business. Table 10a shows the percentage of responses for the town and district centres that believed the aspect did benefit the business and Table 10b shows the same for the local centres.

10.14 In general, over 50% of businesses felt that the majority of the aspects listed benefited their business. 'Affordable premises to buy for expansion' was the aspect considered to least benefit businesses.

10.15 83.3% or more of businesses in the town and district centres felt that the ease at which customers could get into the centre was a significant benefit. Over 86% of businesses in Wimbledon, Morden and Mitcham also felt the ease at which employees could get into a centre was a benefit. A high proportion of businesses in all centres felt the local demand for products/services and good bus services were significant benefits.

Table 10a: Aspects of Town and District Centres that Benefit Businesses

Aspect	% of responses suggesting benefit			
	Wimbledon	Morden	Mitcham	Colliers Wood
Room to expand	24.0	30.0	56.7	16.7
Good road network	68.0	76.7	80.0	56.7
Availability of car parking	56.0	63.3	86.7	53.3
Employees living in area	62.0	66.7	76.7	43.3
Good bus services	86.0	80.0	93.3	63.3
Easy for employees to get to	94.0	86.7	86.7	70.0
Easy for customers to get to	96.0	93.3	100.0	83.3
Local demand for product/ service	88.0	83.3	90.0	76.7
Affordable premises to buy for expansion	30.0	43.3	36.7	20.0
Presence of other businesses	82.0	63.3	76.7	70.0
Affordable rents	50.0	66.7	60.0	50.0
The variety of shops	84.0	60.0	80.0	56.7
Brand (ie. Wimbledon tennis)	54.0	40.0	26.7	30.0

Table 10b: Aspects of Local Centres that Benefit Businesses

Aspect	% of responses suggesting benefit				
	Wimbledon Village	Raynes Park	North Mitcham	Motspur Park	Arthur Road
Room to expand	12.0	6.7	50.0	60.0	40.0
Good road network	52.0	93.3	60.0	100.0	100.0
Availability of car parking	28.0	46.7	70.0	80.0	100.0
Employees living in area	60.0	80.0	60.0	80.0	60.0
Good bus services	76.0	86.7	90.0	60.0	80.0
Easy for employees to get to	72.0	86.7	80.0	80.0	100.0
Easy for customers to get to	76.0	93.3	100.0	100.0	100.0
Local demand for product/ service	84.0	93.3	80.0	100.0	100.0
Affordable premises to buy for expansion	12.0	33.3	80.0	20.0	60.0
Presence of other businesses	88.0	73.3	70.0	80.0	60.0
Affordable rents	32.0	53.3	80.0	100.0	80.0
The variety of shops	72.0	73.3	70.0	80.0	80.0
Brand (ie. Wimbledon tennis)	52.0	26.7	40.0	40.0	80.0

Source: NEMS Business Occupier Survey November 2010

Green figures *– most important aspects i.e. with over 80% of responses suggesting that business benefited from that particular aspect.*

Black *= reasonably important aspects i.e. with between 50% to 80% of responses suggesting that business benefited from that particular aspect.*

Red figures *– the least important aspects i.e. with under 50% of responses suggesting that business benefited from that particular aspect*

Rating of Centres

10.16 Occupiers were asked how they rated the centres against a number of aspects. Table 11a shows the results for the town and district centres and Table 11b shows the same for the local centres. A scoring system of 2 points for 'very good', 1 point for 'quite good', 0 points for 'neither good nor poor', -1 point for 'quite poor' and -2 points for 'very poor' is used to calculate an average.

Table 11a: Rating of Town and District Centres

Aspect	Score			
	Wimbledon	Morden	MItcham	Colliers Wood
Rents/rates	-0.33	-0.26	-0.38	0.20
Availability of business/ customer parking	-0.53	-0.61	-0.34	-0.79
Traffic circulation	-0.70	0.27	-0.63	-0.90
Safety during the daytime	0.75	0.43	-0.10	0.76
Safety during the evenings and at night	0.32	-0.19	-0.88	0.28
Crime and security	0.38	0.19	-0.62	-0.04
Range of shops and services available	0.64	-0.50	-0.38	0.69
Quality of shops and services available	0.76	-0.47	-0.14	0.89
Leisure and entertainment facilities	0.74	-0.97	-0.75	0.00
Street furniture and landscaping	0.15	0.00	-0.19	0.19
Liveliness/street life/character	0.58	-0.31	-0.32	0.56
Level of street cleansing and litter	0.34	0.47	-0.04	0.61
Town centre management and maintenance	0.49	0.32	0.50	0.48
Condition/appearance of older buildings	0.60	-0.14	-0.27	-0.23
General shopping environment	0.66	-0.24	-0.29	0.63
Interest shown by the local authorities	-0.05	-0.27	-0.39	0.08
Marketing/promotion	0.38	-0.24	-0.59	-0.42
Interest shown by landlord/ owners	-0.03	-0.38	-0.33	0.40
The way businesses work together	-0.28	-0.04	-0.27	0.48
The quality of parks and open spaces	0.24	0.85	0.58	0.00
Town Centre events	0.41	-0.74	-0.25	-0.53
Total Average	0.26	-0.13	-0.29	0.16

Source: NEMS Business Occupier Survey November 2010

Green figures *good to very good (0.5 - 2),* ***Black figures*** *neutral (-0.5 – 0.5),* ***Red figures*** *poor to very poor (-0.5 - -2)*

10.17 In general, the majority of aspects within the town and district centres (Table 11a) were considered to be between 'quite poor' or 'quite good'. No aspects scored 1 or above (quite good) or below -1 (quite poor). In Morden and Mitcham, only one aspect – the quality of parks and open spaces – scored above 0.5 (good). The overall average score for the town and district centres was closest to 'neither good nor poor', with Wimbledon having the highest average score of 0.26, and Mitcham the lowest score of -0.29.

Table 11b: Rating of Local Centres

Aspect	Score				
	Wimbledon Village	Raynes Park	North Mitcham	Motspur Park	Arthur Road
Rents/rates	-0.90	0.23	0.38	0.20	0.67
Availability of business/ customer parking	-1.36	-0.93	-0.90	-1.20	0.00
Traffic circulation	-0.16	0.40	-0.10	0.80	0.20
Safety during the daytime	1.00	0.60	-0.30	0.40	1.40
Safety during the evenings and at night	0.77	0.29	-1.78	0.00	1.25
Crime and security	0.33	0.07	-1.25	-0.60	1.40
Range of shops and services available	0.42	0.33	0.00	0.00	0.80
Quality of shops and services available	0.92	0.53	-0.10	0.00	1.00
Leisure and entertainment facilities	0.10	-0.43	-0.30	-0.60	0.00
Street furniture and landscaping	0.91	0.36	-0.20	0.20	-0.25
Liveliness/street life/character	0.96	0.50	-0.22	-0.20	0.40
Level of street cleansing and litter	0.75	1.00	0.00	0.20	1.40
Town centre management and maintenance	0.59	0.57	0.33	0.00	1.00
Condition/appearance of older buildings	0.88	0.73	0.00	0.40	1.20
General shopping environment	0.58	0.15	0.11	-0.40	0.80
Interest shown by the local authorities	-0.61	0.00	-0.67	-0.40	0.40
Marketing/promotion	0.30	-0.69	-0.38	-0.20	0.00
Interest shown by landlord/ owners	-0.08	0.64	0.17	0.00	0.80
The way businesses work together	0.36	0.79	0.44	-0.40	1.20
The quality of parks and open spaces	1.19	0.93	0.75	0.75	1.40
Town Centre events	0.45	-0.73	-0.57	-0.20	1.33
Total Average	0.35	0.25	-0.22	-0.06	0.78

Source: NEMS Business Occupier Survey November 2010

Green figures *good to very good (0.5 - 2),* ***Black figures*** *neutral (-0.5 – 0.5),* ***Red figures*** *poor to very poor (-0.5 - -2)*

10.18 Overall, the local centres scored better than the town and district centres (Table 11b). Ten aspects scored 1 or above (quite good), while three aspects scored below -1 (quite poor). In North Mitcham only one aspect – the quality of parks and open spaces – scored above 0.5 (good), and in Motspur Park only two aspects – the quality of parks and open spaces and traffic circulation – scored above 0.5 (good).

10.19 The overall average score for the local centres was closest to 'neither good nor poor', with Arthur Road having the highest average score of 0.78 (good), and North Mitcham the lowest score of -0.22.

Measures to Help Businesses

10.20 Occupiers were to rate a set of measures in terms of how they would be perceived to help their businesses (Table 12a and 12b). A scoring system of 5 points for 'a lot' of help to 1 point for 'a little' help is used to calculate an average.

10.21 The average of all the measures in all of the centres scored between 3 and 4 ('neither a lot nor a little' and 'quite a lot'), with the exception of Arthur Road which scored 4.25, and 11 out of the 13 measures were considered to provide quite a lot of help to businesses.

10.22 In the town and district centres and the local centres, the measure rated most likely to help businesses was improved customer car parking. The measure rated least likely to help businesses was assistance in the recruitment and retention of staff.

10.23 In Wimbledon, in addition to improved customer parking, businesses thought security measures such as CCTV and policing and better marketing and promotion of the centre in general were considered to be of help for businesses, however no factors scored above 4. Pedestrianisation, streetscape improvements and assistance in the recruitment and retention of staff were thought to be of least assistance to businesses.

10.24 After improved customer parking, measures that were believed to be of assistance to businesses in Morden include better marketing and promotion of the centre in general and events and special promotions, however no factors scored above 4.

10.25 For Colliers Wood, improved customer car parking and better marketing and promotion of the centre in general were rated most likely to help businesses, followed by events and special promotions and security measures such as CCTV and policing.

10.26 In Mitcham, seven out of the 13 measures were rated 4 or above (quite a lot of help). These included; streetscape improvements, street cleaning and environmental services, pedestrianisation and business support/advice. In general, the businesses in Mitcham thought that most of the measures would help their businesses.

Table 12a: Measures to Help Businesses – Town and District Centres

Measure	Score			
	Wimbledon	Morden	Mitcham	Colliers Wood
Streetscape improvements	2.94	2.23	3.53	2.52
Street cleaning and environmental services	3.55	2.86	4.23	3.17
Shop front improvements	3.47	2.90	4.10	3.28
Security measures such as CCTV and policing	3.79	3.23	4.62	3.59
Pedestrianisation	2.96	2.97	3.14	2.55
Better arrangements for receiving deliveries	3.43	3.14	3.30	3.08
Improved customer parking	3.98	3.83	4.47	4.00
Events and special promotions	3.57	3.46	3.97	3.64
Better marketing and promotion of the centre in general	3.85	3.67	4.23	3.73
An effective town centre forum where businesses can be heard	3.71	3.33	4.10	3.23
Business support/advice	3.10	3.14	3.67	3.42
Assistance in the recruitment & retention of staff	2.61	2.53	2.76	2.25
Redevelopment of sites	3.22	3.11	4.17	3.50
Total Average	3.40	3.11	3.87	3.23

Source: NEMS Business Occupier Survey November 2010

Green figures *above 4 (quite a lot of help)*

Black figures *between 3 and 4 (neutral)*

Red figures *below 3 (neither a lot nor a little help)*

Table 12b: Measures to Help Businesses – Local Centres

Aspect	Score				
	Wimbledon Village	Raynes Park	North Mitcham	Motspur Park	Arthur Road
Streetscape improvements	2.83	3.20	3.13	3.40	3.20
Street cleaning and environmental services	3.33	4.27	3.63	2.80	4.00
Shop front improvements	3.17	3.33	3.75	2.80	4.80
Security measures such as CCTV and policing	3.36	3.87	4.25	4.80	4.40
Pedestrianisation	3.29	3.07	3.50	3.00	4.00
Better arrangements for receiving deliveries	3.50	3.43	3.63	3.20	4.60
Improved customer parking	4.96	4.20	5.00	4.60	4.80
Events and special promotions	3.54	3.00	3.88	4.00	4.20
Better marketing and promotion of the centre in general	3.48	3.33	4.00	4.00	4.20
An effective town centre forum where businesses can be heard	3.23	3.33	4.29	3.80	4.20
Business support/advice	2.86	2.67	3.38	3.80	4.20
Assistance in the recruitment & retention of staff	1.86	2.36	2.50	3.50	3.80
Redevelopment of sites	3.25	3.00	3.86	3.20	4.80
Total Average	3.28	3.31	3.75	3.61	4.25

Source: NEMS Business Occupier Survey November 2010

Green figures *above 4 (quite a lot of help)*

Black figures *between 3 and 4 (neutral)*

Red figures *below 3 (neither a lot nor a little help)*

Opinions of the Centres

10.27 Table 13 summarises occupiers' opinions on the town centre in shopping terms. The highest proportion of people in Morden and Mitcham felt that the centres were too down market (70.0% and 76.7% respectively). The majority of occupiers in Wimbledon town centre and Colliers Wood thought that the centre was fine as it is (66.0% and 50.0% respectively).

10.28 In the local centres, the highest proportion of people in Raynes Park, North Mitcham and Motspur Park felt that the centres were too down market (53.3%, 50.0% and 60.0%). The majority of occupiers in Wimbledon Village and Arthur Road thought that the centre was fine as it is (60% each), and Wimbledon Village received the highest proportion of responses that the centre was too up market (28.0%).

Table 13: Opinions on Centres in Shopping Terms

Centre	% Respondents			
	Too up market	Fine as it is	Too down market	Don't know
Wimbledon Town Centre	16.0	66.0	14.0	4.0
Morden	3.3	23.3	70.0	3.3
Mitcham	0.0	23.3	76.7	0.0
Colliers Wood	3.3	50.0	30.0	16.7
Wimbledon Village	28.0	60.0	4.0	8.0
Raynes Park	6.7	40.0	53.3	0.0
North Mitcham	10.0	20.0	50.0	20.0
Motspur Park	0.0	40.0	60.0	0.0
Arthur Road	20.0	60.0	20.0	0.0

Source: NEMS Business Occupier Survey November 2010

10.29 Occupiers' opinions on the town centres shopping and service mix can be seen in Table 14. The majority of occupiers in Morden, Mitcham and North Mitcham considered that there are not enough larger chain stores in the centres (56.7%, 56.7% and 50.0%). In Wimbledon town centre, Colliers Wood, Motspur Park and Arthur Road the highest proportion felt that the centre has about the right mix of small and large shops (48.0%, 46.7%, 60.0% and 60.0%). In Wimbledon Village and Raynes Park, the highest proportion felt that there were not enough small independent shops (64.0% and 40.0%).

Table 14: Opinions on Current Shopping and Service Mix

Centre	% Respondents			
	Not enough large chain stores	About the right mix	Not enough small independent shops	Don't know
Wimbledon Town Centre	18.0	48.0	32.0	2.0
Morden	56.7	20.0	16.7	6.7
Mitcham	56.7	33.3	6.7	3.3
Colliers Wood	6.7	46.7	30.0	16.7
Wimbledon Village	8.0	24.0	64.0	4.0
Raynes Park	20.0	26.7	40.0	13.3
North Mitcham	50.0	30.0	0.0	20.0
Motspur Park	0.0	60.0	40.0	0.0
Arthur Road	0.0	60.0	40.0	0.0

Source: NEMS Business Occupier Survey November 2010

Appendix 11 Planning Policy Context

11.0 Planning Policy Context

National Retail Planning Policy

11.1 PPS4: Planning for Sustainable Growth was published on 29 December 2009 and sets out the Government's policies for economic development, replacing PPG4, PPG5, PPS6 and parts of PPS7 and PPG13. PPS4 places retail and town centre development in its wider context, as "economic development" which provides employment opportunities, generates wealth or produces an economic output or product. As such, this contributes to the Government's overarching objective of "sustainable economic growth".

11.2 PPS4 applies to the following main town centre uses (paragraph 7):

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

11.3 Paragraph 10 identifies that in order to achieve sustainable economic growth, one of the key objectives is to promote the vitality and viability of town and other centres as important places for communities. PPS4 also identifies the need to promote competition between retailers and enhanced consumer choice through innovation and efficient shopping, leisure, tourism and local services.

Using Evidence

11.4 PPS4 emphasises a "plan-led" approach and the need for a robust evidence base. At the local level, policy EC1.3 states that the evidence base should:

a be informed by regional assessments;

b assess the detailed need for land or floorspace for economic development, including for all main town centre uses over the plan period;

c identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day need;

d assess the existing and future supply of land available for economic development, ensuring that existing site allocations for economic development are reassessed against the policies in this PPS, particularly if they are for single or restricted uses. Where possible, any reviews of land available for economic development should be undertaken at the same time as, or combined with, strategic housing land availability assessments; and e assess the capacity of existing centres to accommodate new town centre development taking account of the role of centres in the hierarchy and identify centres in decline where change needs to be managed.

11.5 Specifically in relation to retail and leisure development, policy EC1.4 requires local planning authorities to take account of both the qualitative and quantitative need for additional floorspace for different types of retail and leisure developments.

11.6 When assessing quantitative need, relevant market information and economic data should be taken into consideration, including a realistic assessment of existing and forecast population levels, forecast expenditure for specific classes of goods to be sold, within the broad categories of convenience and comparison goods and for main leisure sectors, and forecast improvements in retail sales density.

11.7 In terms of qualitative need, assessments should consider whether there is provision and distribution of shopping, leisure and local services, which allow genuine choice to meet the needs of the whole community and in deprived areas which lack access to a range of services and facilities, additional weight should be given to meeting these qualitative deficiencies. Assessments should also take into account the degree to which shops may be overtrading and whether there is a need to increase competition and retail mix.

Plan Making

11.8 Policy EC2.1 identifies the issues that local planning authorities are required to address within their development plan, including:

- setting out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth, identifying priority areas with high levels of deprivation that should be prioritised for regeneration investment;
- seeking to make the most efficient and effective use of land, prioritising previously developed land which is suitable for re-use and reflects the different location requirements of businesses;
- identifying a range of sites, to facilitate a broad range of economic development, including mixed use. Existing site allocations should not be carried forward from one version of the development plan to the next without evidence of the need and reasonable prospect of their take up during the plan period. If there is no reasonable prospect of a site being used for the allocated economic use, the allocation should not be retained, and wider economic uses or alternative uses should be considered;
- encouraging new uses for vacant or derelict buildings, including historic buildings; and

- considering how sites for different business types can be delivered, including by the use of compulsory purchase to assemble sites and other planning tools including area action plans, simplified planning zones and local development orders.

11.9 Policy EC3 requires local planning authorities to set a strategy for the management and growth of centres over the plan period. As part of this strategy, LPAs should set flexible policies for their centres, which are able to respond to changing economic circumstances and encourage, where appropriate, high-density development accessible by public transport, walking and cycling.

11.10 LPAs are also required to define a network and hierarchy of centres, to meet the need of their catchments, based on:

- making choices about which centres will accommodate any identified need for growth in town centre uses, considering their expansion if necessary, taking into account the need to avoid an over concentration of growth in centres, and any identified deficiencies in the network of centres should be addressed by promoting centres to function at a higher level in the hierarchy, or designating new centres where necessary, giving priority to deprived areas;
- ensuring any extensions to centres are carefully integrated with the existing centre;
- where existing centres are in decline, considering the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promoting the diversification of uses and improving the environment;
- where reversing decline in existing centres is not possible, considering reclassifying the centre at a lower level within the hierarchy of centres;
- ensuring that the need for any new, expanded or redeveloped out-of-centre regional or sub-regional shopping centre or any significant change in the role and function of centres is considered through the regional spatial strategy.

11.11 In addition, at the local level there is a requirement to:

a define the extent of the centre and the primary shopping area, having considered distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations;

b consider setting floorspace thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment under and specify the geographic areas these thresholds will apply to;

c define any locally important impacts on centres which should be tested;

d encourage residential or office development above ground floor retail, leisure or other facilities within centres, ensuring that housing in out-of-centre mixed-use developments is not, in itself, used as a reason to justify additional floorspace for main town centre uses in such locations;

e identify sites or buildings within existing centres suitable for development, conversion or change of use; and

f use tools such as local development orders, area action plans, compulsory purchase orders and town centre strategies to address the transport, land assembly, crime prevention, planning and design issues associated with the growth and management of their centres.

11.12 Policy EC4.1 requires LPAs to proactively plan to promote competitive town centre environments and provide consumer choice, by:

a supporting a diverse range of uses which appeal to a wide range of age and social groups, ensuring that these are distributed throughout the centre;

b planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of a centre;

c supporting shops, services and other important small scale economic uses (including post offices, petrol stations, village halls and public houses) in local centres and villages;

d identifying sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified;

e retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement; and

f taking measures to conserve and, where appropriate, enhance the established character and diversity of their town centres.

11.13 There is also a requirement for LPAs to manage the evening and night-time economy in centres (policy EC4.2), including policies to encourage a range of complementary evening and night-time uses, and setting out the number and scale of leisure developments they wish to encourage, taking into account the potential impact on the character and function of a centre.

11.14 Policy EC5.1 requires LPAs to identify an appropriate range of sites to accommodate the identified need for main town centre uses, ensuring that sites are capable of accommodating a range of business models in terms of scale, format, car parking provision and scope for disaggregation. The policy states that an apparent lack of sites of the right size and in the right location should not be a reason for LPAs to avoid planning to meet the identified need for development. In undertaking the site selection process, LPAs should:

a base their approach on the identified need for development;

b identify the appropriate scale of development, ensuring that the scale of the sites identified and the level of travel they generate, are in keeping with the role and function of the centre within the hierarchy of centres and the catchment served;

c apply the sequential approach to site selection;

d assess the impact of sites on existing centres; and

e consider the degree to which other considerations such as any physical regeneration benefits of developing on previously-developed sites, employment opportunities, increased investment in an area or social inclusion, may be material to the choice of appropriate locations for development.

11.15 Policy EC5.5 states that LPAs should allocate sufficient sites in development plan documents to meet at least the first five years identified need, where appropriate including policies for phasing and release of sites.

Monitoring

11.16 Policy EC9.1 advises that LPAs should use their annual monitoring reports to keep the following matters under review:

a the network and hierarchy of centres (at regional and local levels);

b the need for further development; and

c the vitality and viability of centres (at a local level).

Development Management Policies

11.17 Policies EC10 to EC19 provide LPAs with guidance for assessing planning applications for economic development. Proposals for retail and town centre uses should be located in an existing centre and accord with an up to date development plan, otherwise they must satisfy the ‘sequential approach’ and the ‘significant adverse impact’ tests before their positive and negative impacts and other material considerations are assessed. The policy also allows for local authorities to define any locally important impacts on centres which should be tested.

Planning Policy Guidance Note 13: Transport (March 2001)

11.18 The key objectives, set out at paragraph 4 of PPG13 are to integrate planning and transport, seek to promote sustainable transport, accessibility and reduce the need to travel.

11.19 The Guidance advises that planning policies should seek to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments. When this development cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out-of-centre developments.

The London Plan

11.20 The London Plan: Spatial Development Strategy has replaced strategic planning guidance for London (formerly RPG3). The London Plan was published in February 2004, and alterations were consolidated in 2008. One of the strategic priorities for South West London (Policy 5E.1) is to: "*further exploit the strength of the Metropolitan town centres and encourage sensitive restructuring of some town centres to reflect changes in the office market and the need for a range of economic activities and housing*".

11.21 Policy 3D.1 relates to town centres stating that the Mayor and London Boroughs should: "enhance access to goods and services and strengthen the wider role of town centres. Policies 3D.2 and 3D.3 are consistent with advice set out in PPS4, regarding maintaining town centres and focusing development within centres. Policies 3D.4 and 3D.5 seek to promote and protect arts/culture and sports facilities.

11.22 The London Plan sets out a network of centres across London, i.e. international centres (2), metropolitan centres (11), major centres (35) and district centres (146). Wimbledon is defined as a *Major Centre* and Morden and Mitcham are defined *District Centres*. The London Plan indicates that the broad classification of centres should be refined in the light of local circumstances through development plans.

11.23 The draft Replacement London Plan was published for consultation between December 2009 and January 2010. It went through an Examination in Public during December 2010. This document is due to be adopted in September 2011.

11.24 Draft Policy 2.15 states that town centres should "*support and enhance the competitiveness, quality and diversity of town centre retail, leisure and other consumer services*".

11.25 Consolidated draft Replacement London Plan (2010) Policy 2.67: Town Centres paragraph 2.67 states that:

"Boroughs should identify and promote the complementary offers of the other smaller centres in the network including neighbourhood centres and local shopping parades. These play a key role in meeting 'walk to', everyday needs and are often the kernel of local 'lifetime' neighbourhoods".

11.26 Consolidated draft Replacement London Plan (2010) Policy 4.8: Supporting a successful and diverse retail sector states that in LDF's boroughs should:

"Provide a policy framework for maintaining, managing and enhancing local and neighbourhood shopping and facilities which provide local goods and services, and developpolicies to prevent the loss of retail and related facilities".

Consumer Expenditure and Comparison Goods Retail Floorspace Need in London (March 2009)

11.27 Supporting the London Plan, the Mayor has published the Consumer Expenditure and Comparison Goods Retail Floorspace Need in London (CECGRFL) which sets out the future requirement for comparison retail floorspace. It was prepared by Experian and published in March 2009.

11.28 In terms of comparison goods, the CECGRFL uses two different scenarios to estimate need: Scenario 1 is based on existing floorspace remaining the same; and Scenario 2 incorporates allowances for retail commitments and proposals in the planning pipeline. Scenario 2 is considered to more accurately reflect future floorspace requirements. Experian incorporates high, mid-range and low floorspace estimates based on differing productivity growth rates of 1.5%, 2.2% and 2.8% respectively.

11.29 The estimated requirement for additional comparison goods floorspace in Merton, South West and the wider London area, based on Scenario 2, is shown in Table 1 below.

Table.1 Comparison Goods Floorspace Requirements

Year	Productivity Growth	Space required (sq m gross)		
		Merton	South West London	London
2011	1.5 2.2 2.8	5,654 2,564 15	83,944 44,256 11,513	476,732 272,656 104,288
2016	1.5 2.2 2.8	13,628 7,023 1,745	194,670 109,280 41,041	1,075,378 629,645 273,435
2021	1.5 2.2 2.8	27,732 16,158 7,586	375,586 231,931 120,731	2,087,461 1,330,595 744,723
2026	1.5 2.2 2.8	42,542 26,057 13,698	474,753 356,710 195,675	2,872,429 2,076,553 1,220,566
2031	1.5 2.2 2.8	69,096 39,588 22,516	749,720 442,293 219,041	4,429,838 2,940,596 1,816,478

Source: CECGRFL (March 2009), Tables 67-71 pages 113-117

Convenience Goods Floorspace Need in London (June 2005)

11.30 The Convenience Goods Floorspace Need in London (CGFNL) document provides detailed strategic guidance on the need for additional convenience goods floorspace in Greater London over the 2001-2016 period. It was produced by Experian. This study is based on retail date that has not been superseded given the length of time that has transpired since its production. On this basis, the findings of this report should be viewed with caution and hold limited weight.

11.31 Similarly to the CECGRFL, the CGFNL estimates future convenience requirements based on a 'timeline' approach within which an allowance is made for committed and proposed retail developments. Three different productivity growth rates of 0.15%, 0.5% and 1.0% are applied to the results and two different sales densities of £5,500 per sq m and £9,400 per sq m are used to estimate the turnover of the pipeline developments.

11.32 The predicted requirement for additional convenience goods floorspace in Merton, South West London and the wider London area is shown in Table 2. It should be noted that although Merton was included in the 'South West' sub-region in the CECGRFL it is classified as forming part of the 'South' sub-region according to the CGFNL.

Table.2 Convenience goods floorspace requirements at 2016

Productivity Growth	Space required (sq.m)		
	Merton	South London	London
Scenario 1 – assumes £5,500 psm for additional floorspace			
0.15	9,293	66,109	457,829
0.5	6,253	42,222	313,939
1.0	2,194	10,325	121,799
Scenario 2 – assumes £9,400 psm for additional floorspace			
0.15	5,438	38,681	267,879
0.5	3,659	24,704	183,688
1.0	1,284	6,041	71,265

Source: CGFNLP (June 2009), Tables 36 and 37, pages 82 and 83

South London Sub-Regional Development Framework (2006)

11.33 The South London Sub-Regional Development Framework (SLSRDF) was adopted in May 2006 and aims to provide guidance on the implementation of policies in the London Plan in South London. It is divided into two parts: Part One concerns the overall direction of the Sub-Region whilst Part Two looks at implementation. Wimbledon Major Centre is identified as a centre with capacity for new retail floorspace and one within which this should be located. Specific emphasis is placed on mixed use schemes within Wimbledon, with a flourishing mix of retail with a growing evening economy and leisure offer.

London Borough of Merton Unitary Development Plan

11.34 The London Borough of Merton Unitary Development Plan (UDP) was adopted in October 2003. Following the Planning and Compulsory Purchase Act (2004) some policies contained within the Local Plan were not saved beyond September 2007 and only saved policies are referred to below.

11.35 Policy TC.1 'Promoting Development in Town Centres' states that a large development for town centre uses should be located within the designated town centres of Wimbledon, Mitcham or Morden. Only exceptionally where a large development can be shown to meet the provisions of Policy TC.2 will it be permitted outside the designated town centres. Large town centre developments are identified as developments providing in excess of 500 sq m floorspace (paragraph 5.3).

11.36 Policy TC.2 'Town Centre Type Developments outside Designated Town Centres' states that outside the designated town centres of Wimbledon, Mitcham and Morden a large development for retail, leisure, entertainment or other town centre uses, other than offices, will be permitted only if criterion set out in the policy are met. This includes demonstrating that there is a need for the development; that there are no sequentially preferable sites; the proposal is accessible; there is no adverse impact on the defined town centres; and the proposal would not undermine the development plan strategy.

11.37 Policy TC.6 'Promoting Vitality and Viability' sets out that the Council will seek to promote the vitality and viability of designated town centres. Policy WTC.3 relates to the primary shopping area of Wimbledon town centre. This states that a proposal that would lead to the loss of one or more small shop units in the Primary Shopping Area will not be permitted, unless it can be demonstrated that such losses will not undermine the overall character and quality of the area. Policy WTC.4 sets out that within the primary shopping area of Wimbledon Town Centre, planning permission will not be granted for the change of use from retail (Class A1) or for the redevelopment of ground floor shops for other uses.

11.38 In line with Policy M1.2, the Council will support an increase in retail development, market stalls and improvements to the pedestrian environment of the Core Shopping Frontages in Mitcham Town Centre.

11.39 Policy MO.3 states that within the Core Frontages in Morden town centre the development of convenience and comparison shopping floorspace will be encouraged within an improved pedestrian environment enhanced by the introduction of measures to reduce traffic.

11.40 Policy CW1 states that within Colliers Wood Urban Centre, new development, environmental improvements and new facilities will be expected to contribute to regeneration of the area for the local community, including mixed developments on suitable sites.

11.41 Policy S.1 relates to Local Centres. Raynes Park, Wimbledon Village, Arthur Road, North Mitcham and Motspur Park will be maintained and enhanced as local centres. Change of use of the ground and upper flows will be favourably considered for a wide range of uses which meet local need in these centres, but the Council will resist major increases in shopping floorspace.

11.42 Policy S.2 'Core Shopping Frontages' states that within the defined Core Shopping Frontages permission for uses outside A1 (retail) use will only be permitted if certain criteria are met. Policy S.3 relates to Secondary Shopping Frontages and a wider range of town centre uses is supported. Policy S.4 'Neighbourhood Parades' allows uses outside Class A1 (Shops) subject to policy criteria.

11.43 Policy S.6 allows small scale shopping development, including those within petrol stations, outside of town or local centres or neighbourhood parades but only in specific circumstances.

Local Development Framework

11.44 LB Merton is in the process of preparing its Local Development Framework (LDF) in line with the new provision of the Planning and Compulsory Purchase Act 2004. When adopted, the LDF will replace saved policies in the UDP, as the statutory local planning document.

11.45 The Council consulted on the LDF Core Strategy Pre-Submission document (CSPSD) between August and September 2010, following endorsement by Council Members in July 2010 to submit this document to the Secretary of State for approval. The Core Strategy has been amended to incorporate the minor proposed changes as a result of this consultation (November 2010).

11.46 The CSPSD recognises that the Centres across the borough play a vital role in providing shops and services, catering for the needs of residents, workers and visitors. Morden and Mitcham are both recognised to be in need of regeneration, and Wimbledon is identified as the borough's most economic asset and it needs to maintain its status as one of south west London's Major Centres.

11.47 The Core Strategy Spatial Vision for Merton includes:

- improving the overall environment of Mitcham District Centre;
- regenerating Morden District Centre;
- creating a thriving, attractive and coherent district centre at Colliers Wood;
- ensuring Wimbledon Town centre continues to development and maintain its position;
- promoting a diverse and resilient local economic base, supporting Wimbledon as the Borough's Major Centre; and
- Maintaining and improving local centres and neighbourhood parades.

11.48 Merton's hierarchy of centres is established through Policy CS7. This includes:

- Major Centre: Wimbledon;
- District Centres: Mitcham, Morden and Colliers Wood (following re-designation);
- Local Centres: Arthur Road; Motspur Park, North Mitcham, Raynes Park, Wimbledon Village;
- Neighbourhood Parades: Various locations around the borough.

11.49 The Council will support new development in these centres commensurate with their scale and function and where it respects or improves the character and local environment of the area. Wimbledon's role as one of London's Major Centres will be maintained, with Mitcham and Morden the focus for the regeneration of the town centres.

11.50 Policy CS1 intends to seek the designation of Colliers Wood as a District Centre in the London Plan hierarchy. It will encourage a mix of unit sizes and improved range of town centre uses within Colliers Wood, especially financial and business services, restaurants, cafes, community facilities, commensurate with its retail offer as a District Centre.

11.51 Policy CS2 relates to Mitcham Town Centre, and seeks to create a viable town centre through improving the quality of commercial, retail, residential and community uses. In terms of the surrounding areas to the centre, the Council will support North Mitcham Local Centre by only supporting development that complements or improves the local or wider public realm.

11.52 Morden Town Centre is dealt with through Policy CS3. The aim of this policy is to regenerate Morden through intensified development in an around the town centre, creating a distinctive and vibrant centre by making more of what Morden has to offer. To do this, it is recognised that there is a need to improve the quantity and quality of commercial, residential and leisure uses, with a range of uses that is appropriate to a District Centre.

11.53 Policy CS4 relates to Raynes Park. Development which provides for the needs of the local community within the local centre will be supported. Restricting further out of centre developments at Shannon Corner where these could harm the vitality and viability nearby town and local centres will be a priority.

11.54 Policy CS6 'Wimbledon Town Centre' seeks to ensure that Wimbledon continues to development and maintain its position as a diverse Major Centre offering excellent shopping, business and cultural facilities, by maintaining the retail core and the redevelopment of key sites. Policy CS6 seeks to maintain the unique retail and built form character of Wimbledon Village, supporting development that is commensurate to the scale and quality of the local centre.

More Morden: Draft Vision Booklet

11.55 More Morden is a project led by Merton Council to revive Morden town centre. The aim is to make the most of its role as a suburban town centre, a key public transport hub and the civic heart of the borough. The vision is to create a distinctive and vibrant centre. The key objective is to regenerate Morden by improving the mix of commercial, residential and retail uses, by intensifying under-developed sites. The Council is seeking greater retail choice in the centre by increasing footfall to encourage growth. Suggested approaches to the redevelopment of the town centre include:

- a new covered shopping development above the Underground Station;
- smaller scale mews streets or lanes capable of accommodating smaller scale 'boutiques' or niche business workshops;
- new retail development to provide a mix of larger and smaller unit sizes;
- extending the existing shopping frontages to complete a 'retail circuit';
- enhancing the leisure facilities; and
- promoting office uses at upper levels.

11.56 In terms of Morden's leisure and recreational facilities, these are regarded as a unique asset and there are proposals in the pipeline for better leisure facilities in Morden, e.g. improvements to Morden Hall Park, Morden Park pool and bring Morden Park playing fields back into public use.