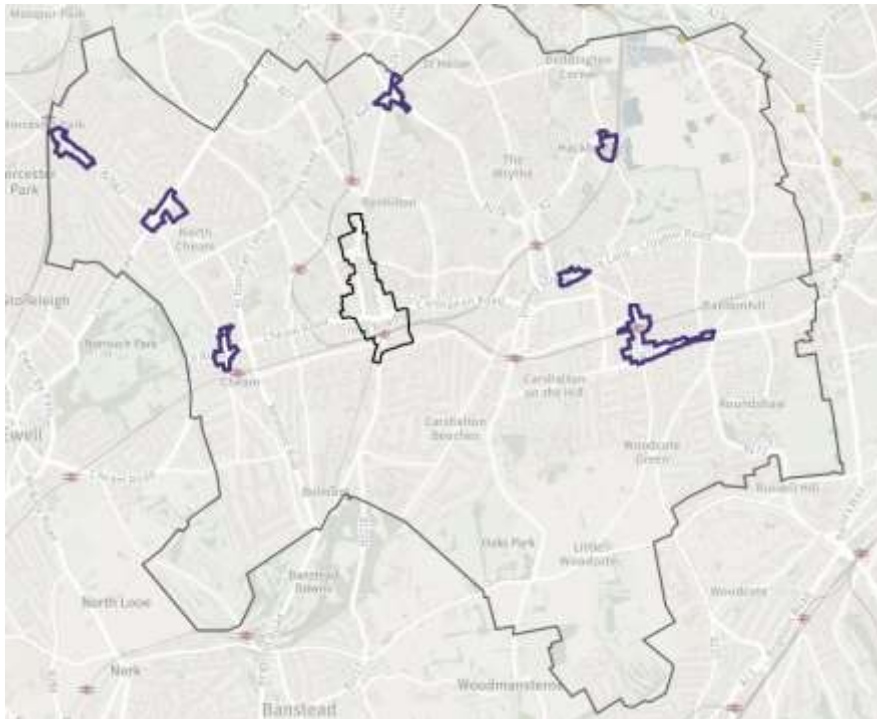


VOLUME C: TOWN CENTRE HEALTH CHECKS

1.0 INTRODUCTION

- 1.1. This appendix provides the findings of qualitative and quantitative assessments of Sutton Town Centre and the Borough's seven Districts Centres, including Carshalton; Cheam Village; Hackbridge; Cheam North; Rosehill; Wallington; and Worcester (see figure below). The Health Check also includes the findings of Household Telephone Interview Survey (HTIS) and feedback from stakeholder engagement.

Figure 1.1: Sutton Borough Boundary with Sutton Town Centre and District Centres



Source: London Borough of Sutton Polices Map

- 1.2. The health check assessments provide an overview of the relative 'health' of the centres by establishing their current vitality and viability based on the key performance indicators (KPIs) set out in the Planning Practice Guidance (PPG). The PPG recommends that health checks are assessed based on the following KPIs:
1. Diversity of uses
 2. Proportion of vacant street level property
 3. Commercial rents yields on non-domestic property
 4. Customers' experience and behaviour
 5. Retailer representation and intentions to change representation
 6. Pedestrian flows
 7. Accessibility
 8. Perception of safety and occurrence of crime
 9. State of town centre environmental quality
 10. Balance between independent and multiple stores
 11. Barriers to new businesses opening and existing businesses expanding
 12. Extent to which there is an evening and night time economy offer

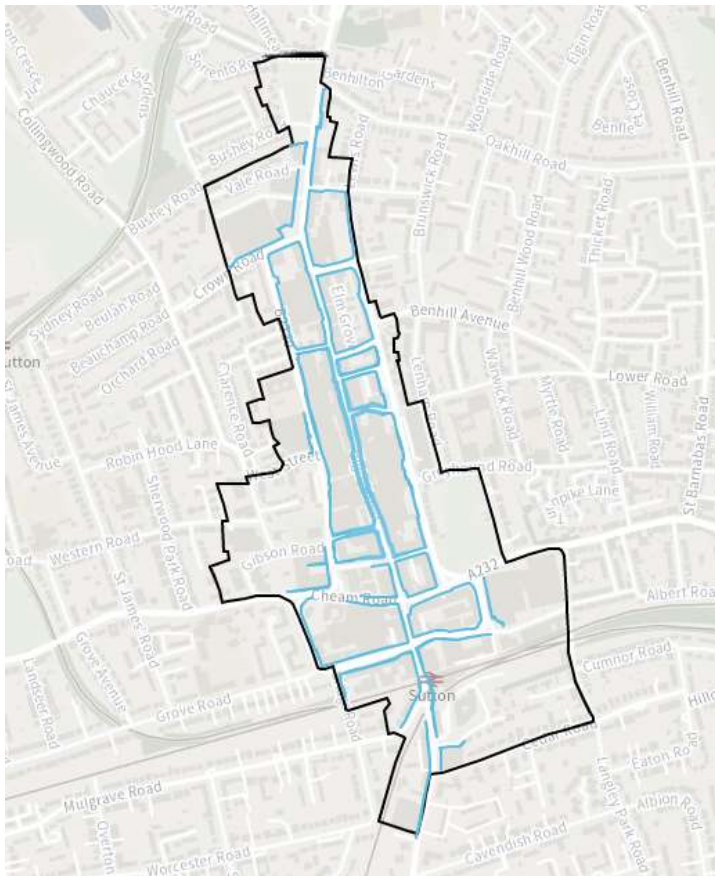
- 1.3. The health check assessments were informed by the Council's survey of town centre units for each centre, which were undertaken in April 2022.
- 1.4. Other sources used to inform the assessments include:
 13. Experian Goad - UK outlets and floorspace averages
 14. PROMIS (PMA) – general town centre profile data
 15. Co-Star - Zone A rents and yields
 16. Datscha - footfall analytics
- 1.5. Local retailer requirements and Zone A rents have been provided for town centres where available and for Sutton Town Centre were informed by feedback from local commercial agents.
- 1.6. The health check assessments were supplemented by a site visit to each centre on the 21st October 2022, which identified new vacancies and informed observations on the quality of environment.
- 1.7. The KPIs help to identify the critical Strengths and Weaknesses of each centre; the Opportunities (SWOTS) for future sustainable development and any current and potential Threats to their overall vitality and viability, summarised in the main report.
- 1.8. One to one telephone meetings were carried out with key stakeholders for each of the town centres to help better understand the local issues and opportunities. A number of stakeholders were approached and contact was successful with the following stakeholders:
 17. Sutton Business Improvement District
 18. Avison Young (Wallington Square)
 19. Fraser Group (Sutton Place) and local agents
 20. Local commercial agents
- 1.9. The findings of the health check assessments are set out in the following proformas.

2.0 SUTTON TOWN CENTRE HEALTH CHECK

Overview:

Sutton Town Centre is characterised by a strong linear north-south axis high street which extends for almost a mile. Commercial town centre uses are focused on High Street and streets that lead off it. Retail activity is broadly concentrated along the central section of High Street which is pedestrianised and where key retail brands are located. At the very northern end there are three large foodstores (Lidl, Sainsbury's and Lidl), with a further two located at the southern end of the town centre. The southern end of the town centre also contains many of the town's service and leisure uses, the train station, and bigger format retailers such as B&Q on Carshalton Way.

Figure 2.1: Sutton Town Centre Boundary and Shopping Frontages



Source: London Borough of Sutton Local Plan Polices Map

The town has one indoor shopping centre, the St Nicholas Shopping Centre, which comprises 38,930 sqm of floorspace and was acquired by the Council in 2021. The shopping centre is a key asset for the town centre and draws The Council are currently considering redevelopment options for the centre, which will form part of a wider regeneration initiative to transform Sutton High Street into a vibrant town centre.

The redevelopment of St Nicholas Shopping Centre will follow recent investment in the town centre including the redevelopment of Sutton Place Shopping Centre/Times Square, where ongoing investment in the centre has attracted new retail and leisure brands to Sutton (e.g. TK Maxx, Pure Gym, and Flannels).

The town centre has a range of densities throughout but is mostly 3-4 stories, towards the south part of the town, near the railway there have been a number of modern high rise developments (up to 17 storeys), and large scale footprint developments taken place, such as B&Q and Morrisons. The figure above shows the Sutton Town Centre boundary and the Primary and Secondary Shopping Frontages as defined in the Local Plan Policy Map.

Diversity of Uses and Vacancies:

The Council provided town centre audit data disaggregated the town centre into the following commercial areas; the Primary Shopping Frontages; Secondary Shopping Frontages (Northern, Central and Southern); St Nicholas Centre and; Times Square. The tables below first summarise the number of retail units by commercial town centre category as defined by Experian Goad within each area, including vacancies, followed by the quantum of floorspace.

The first table below shows that Sutton has a total of 378 commercial town centre units. Of this, the greatest number of units are located on the Southern Secondary Frontages (129). Primary and Northern Secondary contain a similar amount of overall retail provision and Central Secondary has the lowest, which will account for this frontage covering a smaller area.

In terms of town centre category, Sutton Town Centre has 123 retail units (comprising convenience and comparison) accounting for 35% of all commercial outlets. Of this total, 89 are occupied by comparison retailers and 34 by convenience retailers. Leisure Services¹ follow as the category with the second highest representation with 117 outlets. There are 59 Retail Services² outlets and 41 Financial & Business Services outlets. Vacancies are discussed separately.

Table 2.1: No. of Units in Sutton Town Centre

	Primary Frontage	Northern Secondary	Central Secondary	Southern Secondary	St Nicholas Centre	Times Square	Total
Convenience	11	13	0	10	0	0	34
Comparison	35	9	0	11	24	10	89
Retail Service	9	15	2	25	8	0	59
Leisure Service	17	29	6	52	9	4	117
Financial & Business Service	8	9	0	22	2	0	41
Vacant	9	17	2	9	0	1	38
Total	89	92	10	129	43	15	378

Source: LB Sutton Council Survey Data, 2022

The table below identifies the proportional representation of commercial town centre uses as a total of all commercial units and how they compare to UK averages identified by Experian Goad. The overall proportional distribution of outlets is similar to the UK average for convenience and retail services. The proportional representation of comparison retail is just below the national average, which is surprising given that Sutton is sub regional town centre. Leisure service is notably higher than the national average.

Table 2.2: Representation of Commercial Town Centre Units in Sutton Town Centre Versus UK Averages

No. of Outlets	Total	Sutton Avg	UK Avg
Convenience	34	9%	9%
Comparison	89	24%	27%
Retail Service	59	16%	16%
Leisure Service	117	31%	25%
Financial & Business Service	41	11%	9%
Vacant	38	10%	14%
Total	378	100%	100%

Source: LB Sutton Council Survey Data, 2022; Experian Goad

¹ Leisure service includes: food and drink outlets, games of chance venues (e.g. casinos, bingo halls, gambling arcades, and betting shops), sports and leisure facilities, night clubs, cinemas, theatres, and concert halls, and hotel/guesthouse accommodation.

² Retail service includes: health and beauty services (beauty salons, tattoo parlour, etc.), post offices, dry cleaners and laundrettes, travel agents, photo processing outlets and studios, and other personal services.

The table below shows that Sutton has an overall commercial town centre floorspace of 121,063 sqm. Although having almost 40 less units than Southern Secondary Frontages, the Northern Secondary town centre location has the highest quantum of floorspace with 36,976sqm. Convenience has the highest proportion of floorspace with 37,028 sqm due to the presence of Sainsbury's, Asda Superstore and Lidl, and a number of other smaller supermarkets (M&S Foodhall, Farmfoods, etc). Leisure Services represent around 25% of the total floorspace and Comparison retail has an overall total of 27,390 sqm of floorspace.

Table 2.3: Retail Floorspace Categories in Sutton Town Centre Shopping Frontages

Floorspace	Primary Frontage	Northern Secondary	Central Secondary	Southern Secondary	St Nicholas Centre	Times Square	Total
Convenience	3,971	22,017	0	11,041	0	0	37,028
Comparison	12,218	1,504	0	1,073	3,590	9,006	27,390
Retail Service	1,258	1,337	192	2,835	306	0	5,928
Leisure Service	3,906	4295	6,271	10,811	2,745	2,001	30,029
Financial & Business Service	1,676	4,536	0	3,201	105	0	9,518
Vacant	3,257	3,291	2,352	2,168	0	101	11,170
Total	26,286	36,979	8,815	31,129	6,746	11,108	121,063

Source: LB Sutton Survey Council Data, 2022

The table below outlines the quantum of floorspace for each retail and service category compared to the UK average. Overall, the amounts are very similar to the UK average, although the town centre's representation of comparison retail is below the UK average. In contrast, the proportional representation of convenience retail floorspace is significantly higher than the UK average due to the town centre's strong foodstore offer.

Table 2.4: Retail Floorspace in Sutton Town Centre Compared to the UK Average

Floorspace	Total	Sutton Avg	UK Avg
Convenience	37,028	31%	16%
Comparison	27,390	23%	30%
Retail Service	5,928	5%	7%
Leisure Service	30,029	25%	26%
Financial & Business Service	9,518	8%	7%
Vacant	11,170	9%	14%
Total	121,063	100%	100%

Source: LB Sutton Council Survey Data, 2022; Experian Goad

Vacancies

The Council's survey data identified 38 vacant units across the town centre which equates to a vacancy rate (percentage of all commercial units) of 10%. This rate is lower than Experian Goad's UK average vacancy rate of 14%.

The total amount of vacant floorspace in the town centre is 11,170 sqm equating to a vacancy rate of 9%, which is 5 percentage points lower than the UK average.

The Council's survey data indicates that the Primary Frontage and Northern Secondary Frontages have the most vacant floorspace. However, the survey data show that there are no vacancies in the St Nicholas Centre. However, based on the Experian Goad survey data from July 2022 20 vacancies are recorded in the shopping centre. While these vacancies relate to small floorplates the vacancy rates based on the Council's survey data will be higher than what is quoted above.

Customer Perceptions:

The customer perception of the town centre was obtained from household telephone interview surveys (HTIS) conducted in September and October 2022 in the defined catchment of London Borough of Sutton Council and included questions to assess shopping habits. The full results of the HTIS are contained in Volume E. The interview also asked questions to gauge the respondent's perception of the town with regards to what they like about the town centre, what they think could improve the town centre and what would encourage them to visit more in the evening. The responses are detailed below:

What do you like about Sutton Town Centre?

A substantial proportion of respondents reported that they like “nothing / very little” about Sutton Town Centre, which suggests many respondents are not satisfied with the town centre as a shopping destination. However, respondents were still more likely to highlight a positive attribute about the town centre with the most common answer being that the centre is located close to their homes. Other aspects that respondents like most about Sutton Town Centre is that the town has a good range of non-food shops; a good range of retail multiples; and good pubs, cafes and restaurants.

Figure 2.2: What respondents like about Sutton Town Centre



Source: Q24, HTIS (Volume E)

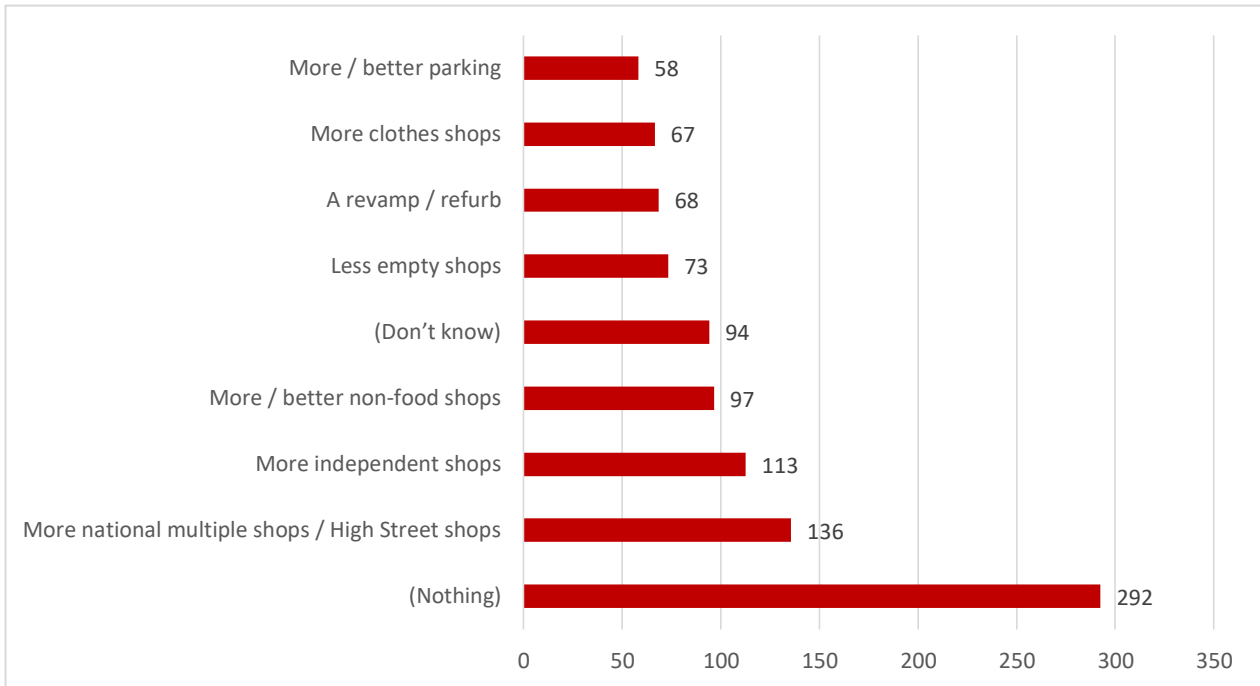
What could be improved about Sutton Town Centre that would make you visit more often?

The survey respondents were given the opportunity to provide their thoughts on what they think would improve Sutton. The vast majority replied “nothing”, which suggests that overall, that respondents are satisfied with the town centre. Alternatively, it could be interpreted that respondents are apathetic to the idea that improvements could encourage more visits.

Where respondents suggested improvements, they were more likely to highlight the need for more multiples and high street shops, which is contrasting to the first question as this was given as a reason people liked Sutton Town Centre. The findings of the questions point to a divergence in opinion between respondents with those who are satisfied with the current offer of high street shops, and those who would like to see an improvement.

The remaining responses were more evenly spread and included with potential improvements to the town centre being more independent shops, better non-food shops and the more detached response of “don't know”.

Figure 2.3: What improvements would encourage more visits to Sutton Town Centre



Source: Q25, HTIS (Volume E)

What would encourage you to visit Sutton Town Centre more often in the evening time?

There was a wide range of responses in relation to what could encourage more visits into the town centre in the evening time. However, based on the top four responses given over 70% stated nothing and 12% responded with “don’t know”. This again could be interpreted in two ways mentioned previously – that respondents are satisfied with current evening time offer or do not think that improvements would encourage more visits. However, the 3rd and 4th most common response related directly to the need for a safer night time environment, and more or better police presence and CCTV, respectively. This indicates that respondents perceive the town centre as unsafe during the evening and night time.

Retail and Leisure Representation:

Sutton has a number of large national multiples throughout the town centre and therefore has a strong retailer representation, particularly in the convenience and comparison sectors. Although the town has lost some major fashion multiples such as Debenhams (which is now a gym), there remains a good mix of retail anchors; some of which are highlighted below:

Table 2.5: Retail Multiple Representation

Convenience	Comparison	Retail & Financial Service	Leisure	
Asda	B&Q	Poundland	Barclays	Caffe Nero
Lidl	Clarks	Primark	Nationwide	Costa
Morrisons	Flannels	Shoe Zone	Lloyds Bank	Domino's Pizza
M&S Simply Food	H&M	Sports Direct	NatWest	Empire Cinema
Sainsbury's	J D Sports	Superdrug	TUI	Ibis
Tesco Express	New Look	T K Maxx		KFC Nando's
	Next	WHSmith		McDonalds
	Pandora	Wilko		Premier Inn
	Peacocks			Pizza Express
				Starbucks
				Zizzi

What is notable is that the town is lacking in branded restaurants which is surprising given that the centre

has a multiplex cinema. The only branded casual dining restaurant recorded is Pizza Express and Zizzi. For a town of Sutton's size, a better range of casual dining restaurant offer should be available including quality restaurant brands. This would help to promote the town's evening time economy.

Retailer operators who are seeking to trade in Sutton have been identified through The Requirement List. Over the 12 months to November 2022 we have identified requirements from six retailers and food and beverage operators seeking a combined minimum floor area of 5,300 sqm gross. The list of operators identified is provided in the table below.

Table 2.6: Retailer Requirements for Sutton Town Centre

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Jul-22	Chiktopia	Restaurant	74	139
Jul-22	Grounded Kitchen	Restaurant	74	167
Mar-22	Savers	Non-food retailer	186	279
Mar-22	Matalan	Non-food retailer	1,301	2,323
Mar-22	Lidl	Discount foodstore	1,672	2,462
Apr-22	Grape Tree	Health food retailer	116	0
	Total		3,423	5,370

Source: The Requirement List, Nov 2022

When considering requirements, it should be noted that operators may not necessarily be seeking a town centre location. For example, Lidl has identified a requirement for Sutton Town Centre but are already trading within the town centre. This may mean that they are seeking a second store, which is likely to be in an accessible location outside of the town centre. Matalan typically seeks retail park locations but the retailer does consider sites in town centre locations.

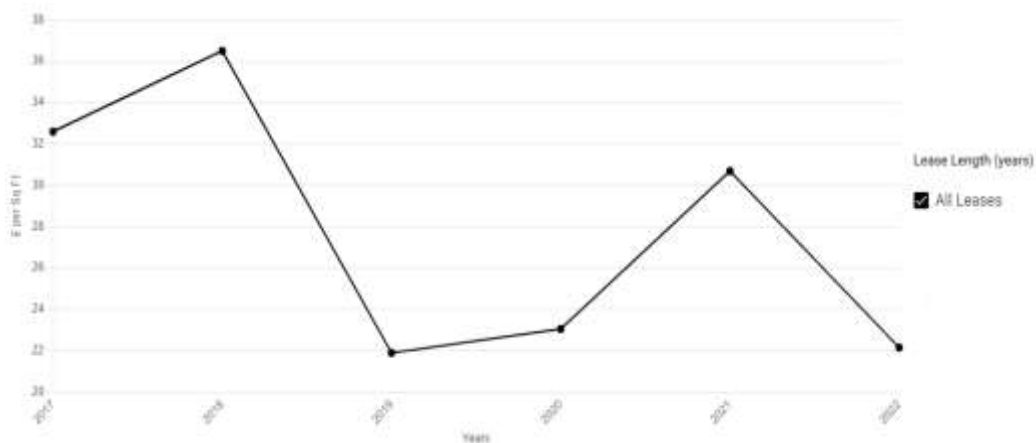
The other retailers and F&B operators identified in the table above are seeking town centre sites.

Commercial Rents and Yields:

According to leases within Sutton Town Centre between 2020 and 2022, the average rent per annum for retail properties between 1,000 and 1,500 sqft is approximately £34,000. In 2020, Zone A rents were approximately £70 per sqft, ranging from £85 to £50. Currently, considering recent agreed deals on Sutton High Street, Zone A rental values are now likely to be between £65 and £70.

Since 2017 the achieved rent has decreased significantly and although there has been a clear recovery since the pandemic, achieved rent has not fully recovered. The figure below illustrates these trends, note that this only accounts for Q1-3 in 2022.

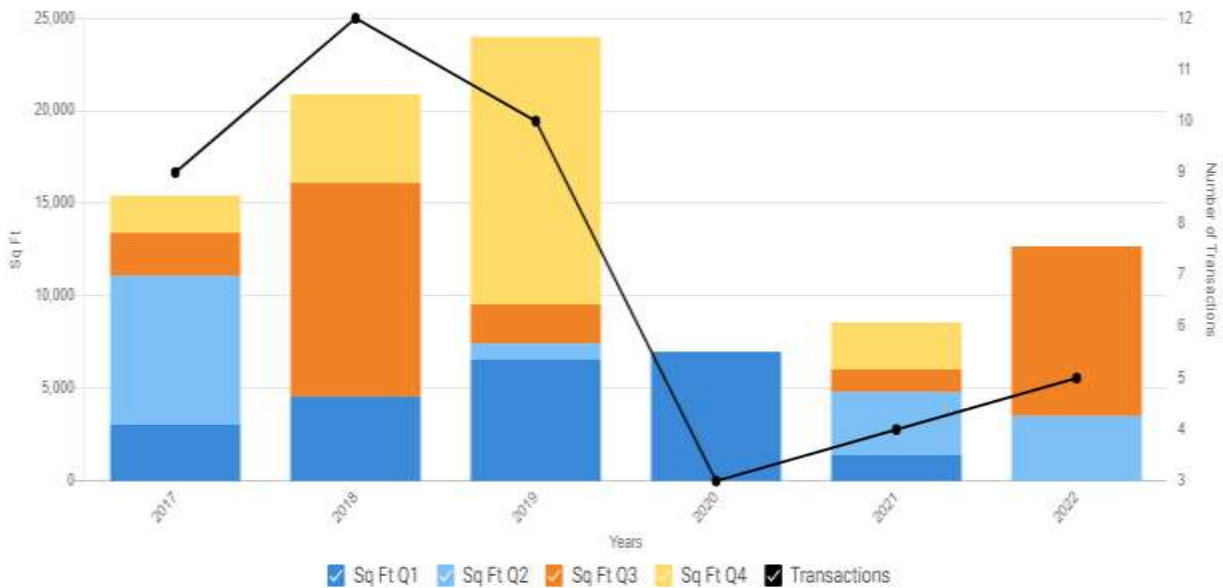
Figure 2.4: Average Achieved Rent (£ per Sq Ft)



Source: Radius

Additionally, the figure overleaf shows the take-up of lettings and occupational sales from 2017-2022. In 2020, there were no retail lettings recording on Radius after Q1 and the market, although recovering, is recovering slowly with no letting transactions recorded in Q1 of 2022.

Figure 2.5: Lettings and Occupational Sales from 2017-2022



Source: Radius

Car Parks:

The Sutton Town Centre Health Check (2022) identified how the town is well served by both public and private car parks (private meaning customer only). We consider that no significant changes have occurred since this study and the details of these figures are outlined in the table overleaf.

Table 2.7: Sutton Town Centre Car Parks

Car Park Name	Postcode	Ownership	Maximum Parking Capacity	Operating Hours*
St Nicholas Centre	SM1 1AY	Private (St Nicholas Centre)	732	Mon – Sat 06:00 – 24:00
Times Square	SM1 4BG	LB Sutton	822	Mon – Sat 07:00 – 20:30
Gibson Road multi-storey	SM1 2RF	LB Sutton	927	Mon – Sat 06:00 – 23:30
Sutton Railway Station	SM2 5AD	Private (Southern Rail)	197	24 hours
ASDA	SM1 1LD	Private (ASDA)	546	Mon – Sat 07:00 – 23:00
B&Q	SM1 4RQ	Private (B&Q)	467	Mon – Fri: 07:00 – 21:00 Sat: 07:00 – 20:00
Morrisons	SM1 1DD	Private (Morrisons)	412	Mon – Sat 06:00 – 23:00
Sainsbury's	SM1 1LD	Private (Sainsbury's)	356	Mon – Sat 07:00 – 22:00
Lidl	SM1 1PG	Private (Lidl)	71	Mon – Sat 07:00 – 22:00
Total			4,530	

Source: Sutton Town Centre Health Check 2022

Pedestrian Flows:

The below table illustrates the heat map of pedestrian footfall throughout Sutton Town Centre. This is taken from data harvested from mobile devices via 80+ sources including mobile apps, Wi-Fi hotspots and telecom providers.

Figure 2.6: Footfall Heat Map in Sutton Town Centre



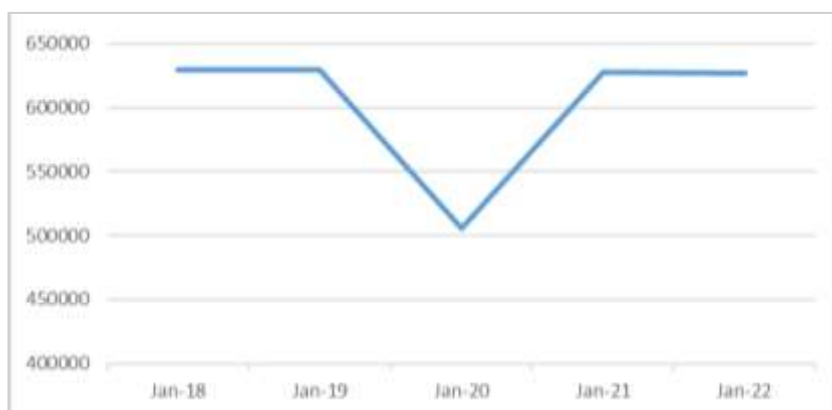
Source: Datscha

The heat map clearly identifies that the highest concentration of footfall is along the entire high street and around the A232. There is a particularly high level of footfall towards the very south of the town centre, indicated in orange, which is where the entrance to Morrisons is located.

The two parallel streets on either side of the high street also have high concentrations of footfall, Saint Nicholas Way and Throwley Way, and throughout the smaller perpendicular streets adjoining them. Footfall drops moving away from the town centres.

The figure below illustrates the footfall data in relation to the busiest section of the high street for the month of September between 2018 and 2022. It shows how footfall in this area has almost recovered to pre-pandemic levels, after experiencing a dip in 2020. The Year-on-Year (YoY) trend for this section in September 2022 is down by **-0.18%**.

Figure 2.7: Sutton September Footfall (2018-2022)



Source: Datscha

Accessibility:

The Sutton Town Centre Health Check (2022) covers the connections Sutton benefits from. At time of this report, nothing has significantly changed.

The town is well-connected, located only 16 kilometres south of central London and offering rail services to London Victoria, London Blackfriars and London Bridge, as well as the surrounding areas such as Croydon. Bus routes also provide comprehensive links to all parts of the Borough.

Tramlink network extensions in this area have been actively pursued, although progress has been put on hold. This extension would connect the town centre to Morden and beyond and increasing overall accessibility.

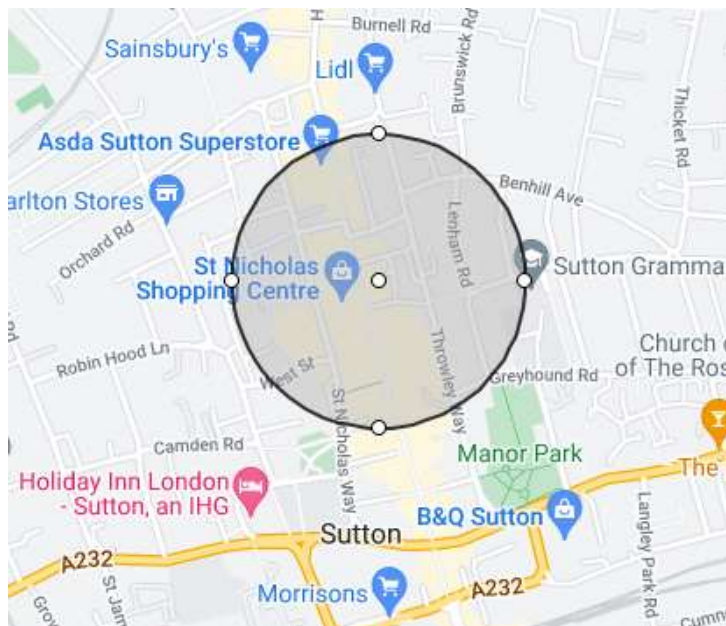
The road network in Sutton Town centre provides links to central London and many roads also form part of the London Cycle Network. The main high street is largely pedestrianised and there are crossings, dropped kerbs and tactile paving provided at key crossing points to aid pedestrians.

The majority of the High Street is pedestrianised which benefits the town centre as it contributes to a feeling of safety when walking, adds to the level of accessible and has less air and noise pollution, often associated with roads that have heavy traffic. Pedestrians also do need to walk across busy roads when walking through the town centre. There is a busy road to the south of the town, the A232, but this has good pedestrian crossings. The paving is with and open and there are dropped kerbs and tactile paving where it is required.

Crime and Safety:

A postcode within the Sutton high street was chosen as a benchmark for crime within the town centre and compared to the overall Sutton average. The radius of the area is 250m (shown below) and this is compared with the Sutton Borough average of the same radius. The data, obtained from CrimeRate, is aggregated from open police force data, social media signals and file FIO requests with local police departments.

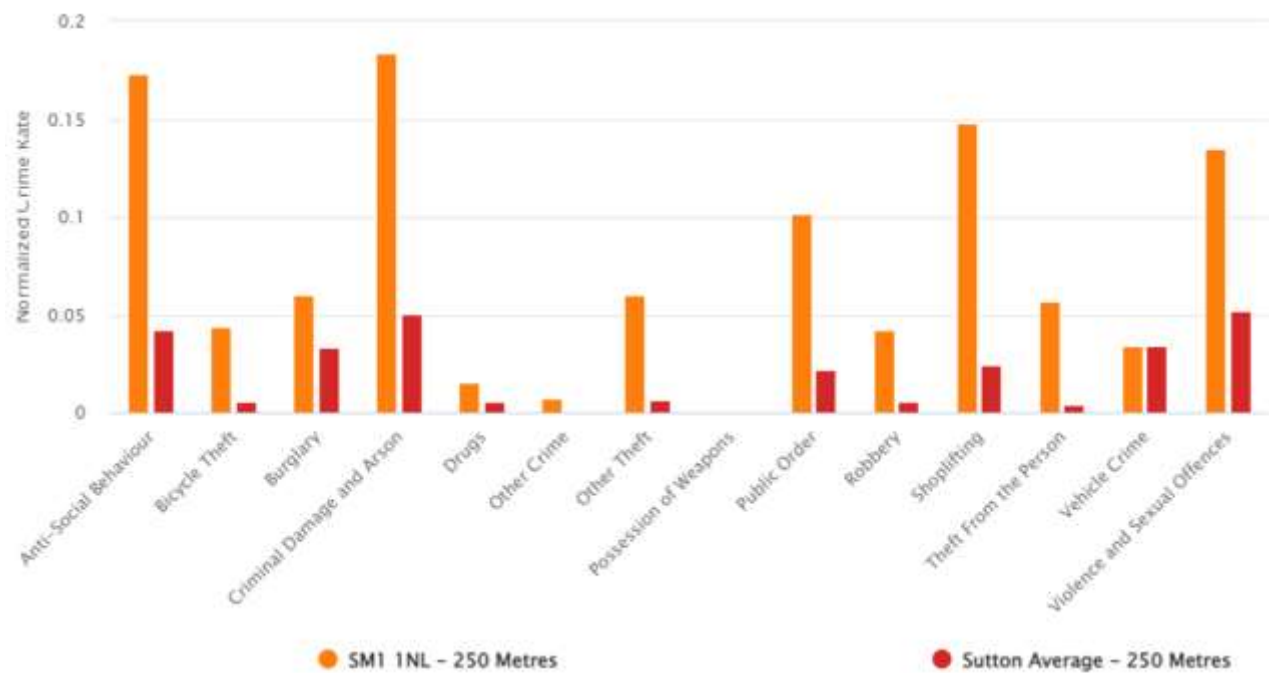
Figure 2.8: 250m Radius from Sutton Town Centre



Source: mapdevelopers

The figure overleaf shows that the most common crimes reported are Criminal Damage and Arson; Violence and Sexual Offences; Shoplifting. Almost all types of crime are much higher within the town centre with the exception of Vehicle Crime which is marginally higher in relation to the Sutton Average (250m).

Figure 2.9: Crimes reported around SM1 1NL



Source: crimerate.co.uk

Town Centre Environmental Quality:

There is a Conservation Area within the town centre which covers many buildings along the High Street. The north part of the town has independent shops on the east side and recently built apartments blocks with gym on the ground floor, set back from the road, where there is a wide paving, planting and seating and the built environment is in good condition.

The Costa coffee and Argos has a small public realm space at the front which didn't appear very functional and was not being used by the public at the time of site visit.

The back of the Lidl faces out onto the high street and there has been an attempt at making this appear to be somewhat of an active frontages with tinted windows and advertising.

A pub, The Winning Post, (est 1907) is located towards the northern part of the Conservation Area and adds a lot of character to this part of the town. Although, overall this part of the Sutton town centre lacks environmental quality, lined with vacant units along the east side and the blank / mirrored façade of the Asda superstore on the west side. The high street is surfaced with brick and it was apparent that there was some pooling of water after rainfall at the time of the site visit.

The town centre has a lot of Georgian and Tudor influenced architecture and many buildings have a lot of character and historic value. The St Nicholas Shopping has a slightly outdated façade and most notably a vacant Debenhams within although the shopping centre was reasonably busy. The Council recently unveiled plans to redevelop this shopping centre and include proposals of high-quality retail, leisure and restaurant space, modern library and community hub and new affordable homes. This should improve the vibrancy in the town centre and increase the mix of independent and chain retailers, and arts and culture offer.

There are a few notable vacancies in key areas along the high street, but there is seating, trees and planting throughout providing a relatively attractive urban environment. The Wilko has a green wall on two main facades and creating a unique feature for High Street that appears to be well maintained appears to be well maintained.

Beyond the A232, and after the pedestrianised high street, the quality of environment further diminishes.

Barriers to Business:

External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of our control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses combat and address them, as these can also result in opportunities. The major global challenges include:

- Cost of Living
- Brexit
- Global Climate Emergency
- Digital Connectivity
- Inflation
- Online Shopping

The main challenges businesses currently face include impacts on supply chains, rising cost of supplies, rising operational costs (e.g. energy prices), labour shortages, and the squeeze on household income from the cost of living crisis which combined are impacting on business viability and growth potential.

Feedback from stakeholders echoed some of the issues that are facing town centre businesses nationally, notably high business rates and rising costs. There was a general consensus among stakeholders that businesses are not generating sufficient sales, which is adding to the town centre's struggles. Some businesses have reduced their opening hours from 7 days a week to 4 days a week. Stakeholders also highlighted that businesses are struggling to secure new staff and as a result shops are being operated by single staff members working on shifts.

Certain stakeholders suggested that the presence of vacancies in the town centre indicates that the centre could be performing better. Retailers, such as Sports Direct, were identified as benefitting the town centre by attracting footfall and expenditure. Stakeholders saw opportunities with the development of Times House.

It was reported that Successful Sutton BID has obtained funding from the Greater London Authority (GLA) for a sustainability themed market to be located near the Asda superstore. This will be launched on the 25th March and has funding for 6 months, with the intention to last beyond the funding end date.

Several stakeholders could not identify any particular threat to businesses that are unique to Sutton, but did consider that there is too much retail accommodation and that fragmented ownership of properties could be a barrier to improvements. Others could identify specific weaknesses such the public realm, where investment is needed. Conversely, some stakeholders do not see benefits to increased expenditure from public realm improvement.

Generally, stakeholders would like to see investment directed to improving infrastructure and improving the appearance of the town centre which is described by some stakeholders as 'dated'. There is also a concern that vacant units are deterring investment in the town centre.

Other issues relating specifically to Sutton include the infrastructure issues particularly in relation to the road gyratory system which stakeholders view as cutting off the town centre. Stakeholders would also like to see more activities for children, managing delivery vehicle access on High Street (where there is conflict with pedestrian areas), and supporting more GP practices to generate footfall.

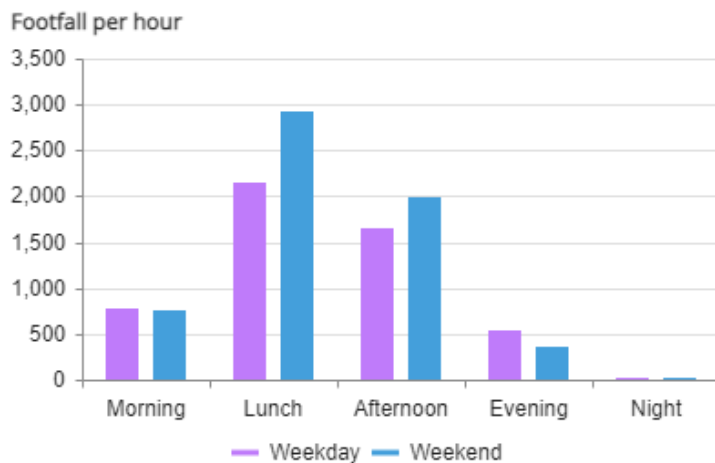
Evening and Night time Economy:

An evening and night time economy often refers to the transition from daytime uses into evening and late night uses, predominantly between 6pm and 6am.

Considering the data obtained from Datscha for the month of September 2022 the figure overleaf shows that town centre activity thrives during the lunch and afternoon times of the day (Lunch defined as between 11am-2pm and Afternoon 2pm-5pm). It also shows that the evening economy (5pm-9pm) is not as busy as the morning and that night time economy is nominal in comparison to morning, lunch,

afternoon and evening.

Figure 2.10: Sutton Weekly Footfall Average



Source: Datscha

Evening activities are relatively limited in Sutton despite its Metropolitan Centre status. Obvious evening time businesses include the Empire Cinema and a small number of pubs and bars, while the town's foodstores are late opening. As highlighted earlier, the town centre does not benefit from a good range of food and beverage outlets, apart from fast food outlets. This highlights an obvious potential area of investment for the town centre.

Conclusions:

Sutton Town Centre is an attractive town centre and a popular shopping destination for Borough residents. The presence of three major foodstores highlights the important role that convenience retail has for the town centre and will be a key driver of footfall to other town centre businesses. The town is also well connected to the surrounding towns and central London. Although rents have decreased in recent years, the town appears to be performing well with lower than average vacancy rate. A number of vacancies in prominent locations and a number of buildings with poor architecture detract from the town's environmental quality.

Sutton is experiencing a lot of development particularly towards the north and south ends of the town centre boundary and due to the town having Metropolitan status; it is a focus of retail, high density employment and residential development. It is clear that the town has strong retail representation as well as independent representation. An Article 4 Direction was put in place that safeguards the town centre from Permitted Development Rights, which has been a concern for many town centres where viable office, retail and other commercial uses have been eroded.

Like many other towns across the UK, Sutton will have been affected by the pandemic. However, it is encouraging that investment is taking place and the Council's acquisition of the St Nicholas Shopping Centre has the potential to transform the town centre. New housing development also brings benefits through increased catchment expenditure which may encourage investment in new town centre operators. Tramlink proposals and other transport improvement will also help increase access to expenditure across the catchment.

There is also opportunity to improve the town's evening time economy by building on the success of the Empire Cinema and promote investment in better quality food and beverage offer.

Overall, it is considered that Sutton is a vital and viable town centre, but investment is critical in order for the town to improve its profile and limit the impact of competition from competing centres that have benefited from significant investment in recent years (e.g. Kingston-upon-Thames and Wimbledon).

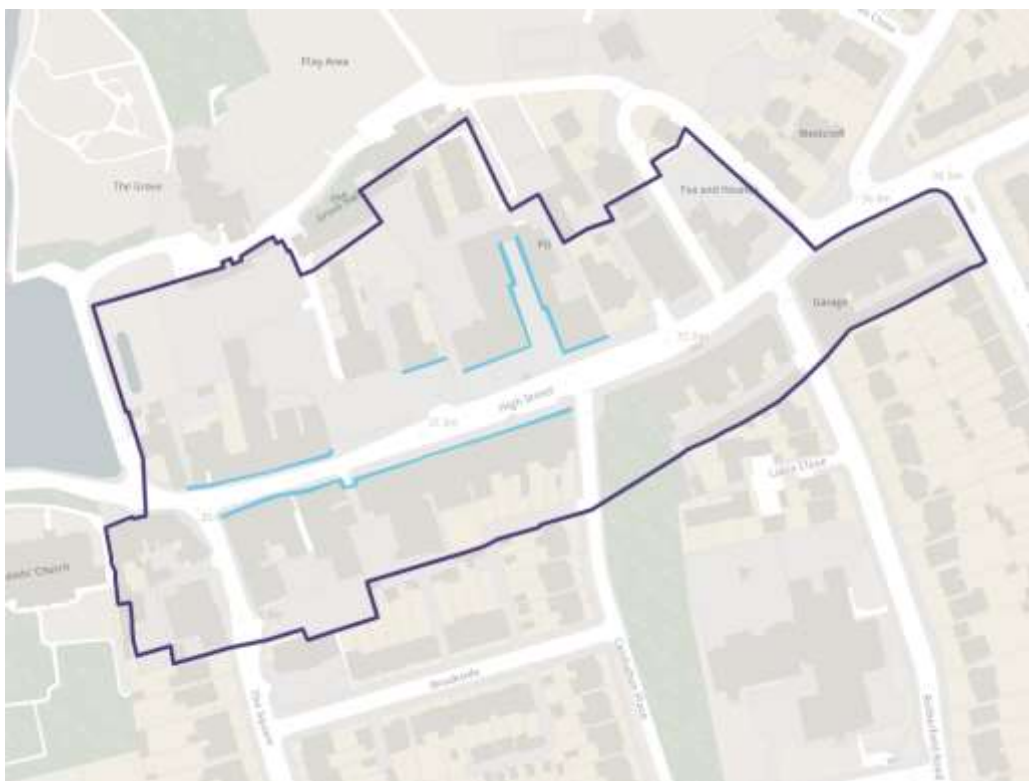
3.0 CARSHALTON DISTRICT CENTRE HEALTH CHECK

Overview:

Carshalton District Centre is located just north west of Wallington and is one the smallest district centres in London Borough of Sutton. The centre comprises the linear High Street, approximately 270 metres long going east-west from the fork at Westcroft Road to Carshalton Ponds. The centre boundary is illustrated below in the figure below and identifies where the Primary Shopping Frontages are located, the majority of the commercial outlets focused on west side of the High Street and along Beacon Grove in the town core.

The centre is located within a Conservation Area. The centre largely comprises small independent retailers but has several national multiples and foodstores which occupy smaller space fitting with the size of the town, Sainsbury's Local for example. There is a prominent vacant public house on the east side of the centre, which has been vacant for a number of years.

Figure 3.1: District Centre Boundary



Source: London Borough of Sutton Polices Map

Diversity of Uses:

Carshalton has a total of 67 commercial outlets with the highest number of units represented by Leisure Services with 19. Convenience retail has the lowest number of outlets and the lowest amount of floorspace (966 sqm). In comparison to the rest of the UK, convenience retail is below average likely due to the centre being served by smaller format foodstores (Sainsbury's Local and Co-Op). Comparison retail is below the UK average which is expected for a town of Carshalton's size and designation as a district centre.

The centre is well served by leisure service outlets, specifically cafes and restaurants. Although there are several national multiples, such as Costa and Domino's, food and beverage (F&B) offer is supported by a strong independent offer. This representation is relative to the UK average. Due to the size and nature of the centre is evident that the vast majority of outlets comprise small commercial floorplates with the average outlet size being approximately 120 sqm.

The town has seven vacant units which account for 10% of all commercial outlets. While the vacancy rate for outlets is below the UK average (14%) the floorspace vacancy rate is on par with the UK average.

Table 3.1: Units and Floor space in Carshalton District Centre

	No. of Outlets	% of Outlets	UK Average	No. of Floorspace	% of Floorspace	UK Average
Convenience	4	6%	9%	966	12%	16%
Comparison	12	18%	27%	1950	24%	30%
Retail Service	14	21%	16%	1078	13%	7%
Leisure Service	19	28%	25%	1704	21%	26%
Financial & Business Service	11	16%	9%	1360	17%	7%
Vacant	7	10%	14%	1136	14%	14%
Total	67	100%	100%	8194	100%	100%

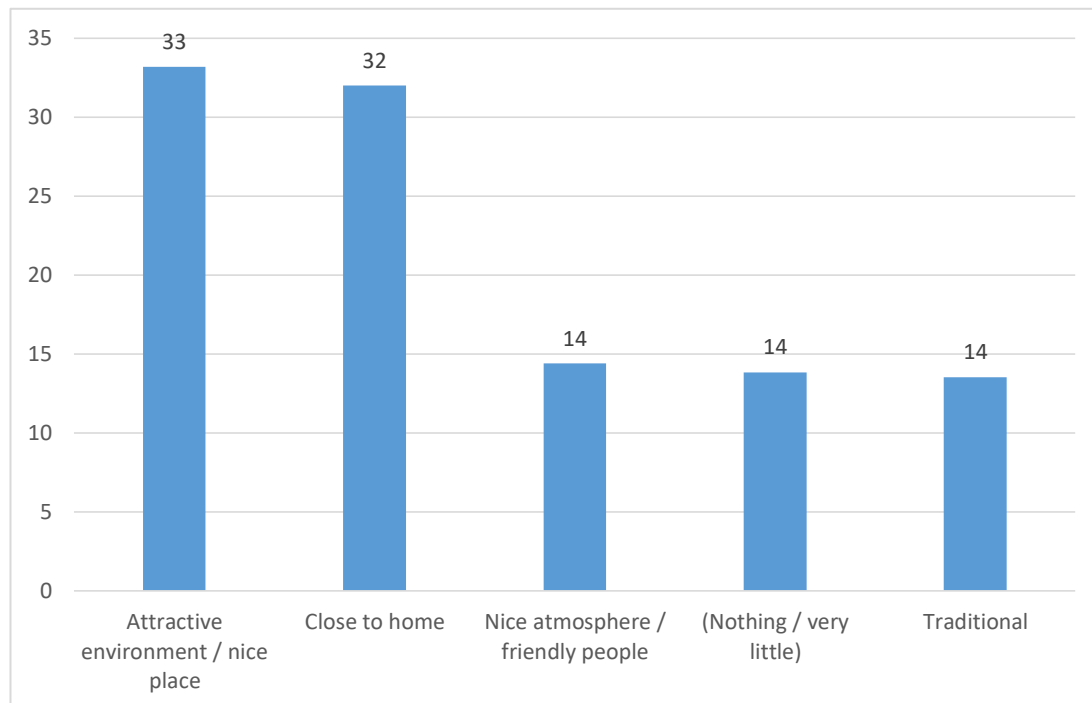
Source: LB Sutton Council Survey Data, 2022; Experian Goad

Customer Perceptions:

What do you like about Carshalton?

The majority of respondents like that Carshalton is an attractive place to live, which also relates to the other responses such as, Carshalton having a nice atmosphere and of a traditional style. Participants also liked that the town centre was close to their home.

Figure 3.2: What do you like about Carshalton District Centre

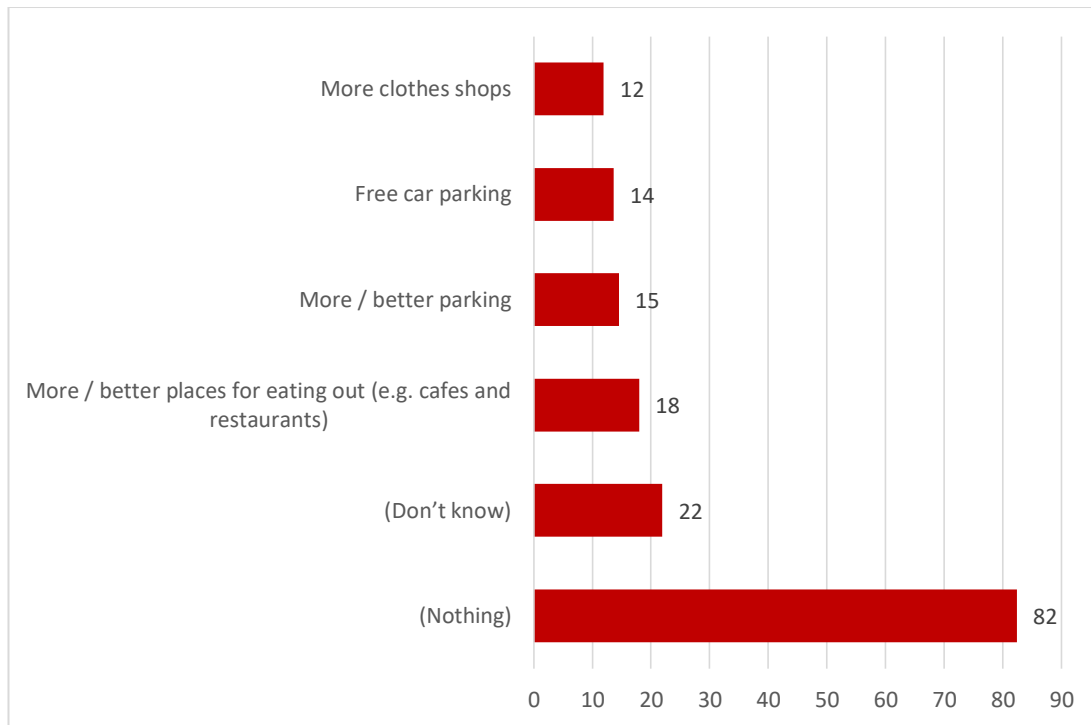


Source: Q29 NEMS, HTIS

What improvements would make you visit Carshalton more often?

Most survey participants stated that nothing would make them visit the town centre more often. The other attributes which respondents brought up included better and free parking; and more clothes shops.

Figure 3.3: Key suggested improvements for Carshalton



Source: Q30 NEMS, HTIS

Q3 What would encourage you to visit the centre more often in the evening time?

Similar responses to Q2 were given for the final question on perception relating to what would encourage them to visit the town centre more in the evening time, mostly nothing / don't know (Q31 HTIS).

Retail and Leisure Representation:

It is expected for a town of this size to have a strong independent retailer and leisure representation and there are only a few national multiples (mentioned above), including Sainsbury's Local, Co-Op, Costa and Dominos. There are two national charity shops Oxfam and Cancer Research.

The centre also has a Ladbrokes betting shop, a Post Office, and Medipharma, which is a regional NHS Community Pharmacy. The Requirement List identified two key retail operators, over the 12 months to November 2022, who are seeking a location in Carshalton:

Table 3.2: Retailer Requirements for Carshalton District Centre

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Mar-22	Savers	Non-food retailer	186	279
Mar-22	Lidl	Discount foodstore	1,672	2,462
	Total		1,858	2,741

Source: The Requirement List, Nov 2022

Retail operators, such as Lidl, could occupy a smaller store in relation to floorspace, given the size of Carshalton centre, and they would more likely consider an edge of town location here. The minimum floorspace Savers are seeking is still above the average commercial outlet in Carshalton but appears to be much more in line with the existing retailers within the centre.

Pedestrian Flows:

Although the High Street clearly has more concentrated levels of footfall, other parts of the centre also have moderate levels of footfall, likely as a result of the more compact nature of the centre and the permeable built form in terms of pedestrian connectivity i.e. parts of the town can be accessed in

multiple ways, and roads through the town lead to residential areas, the pond, and The Grove.

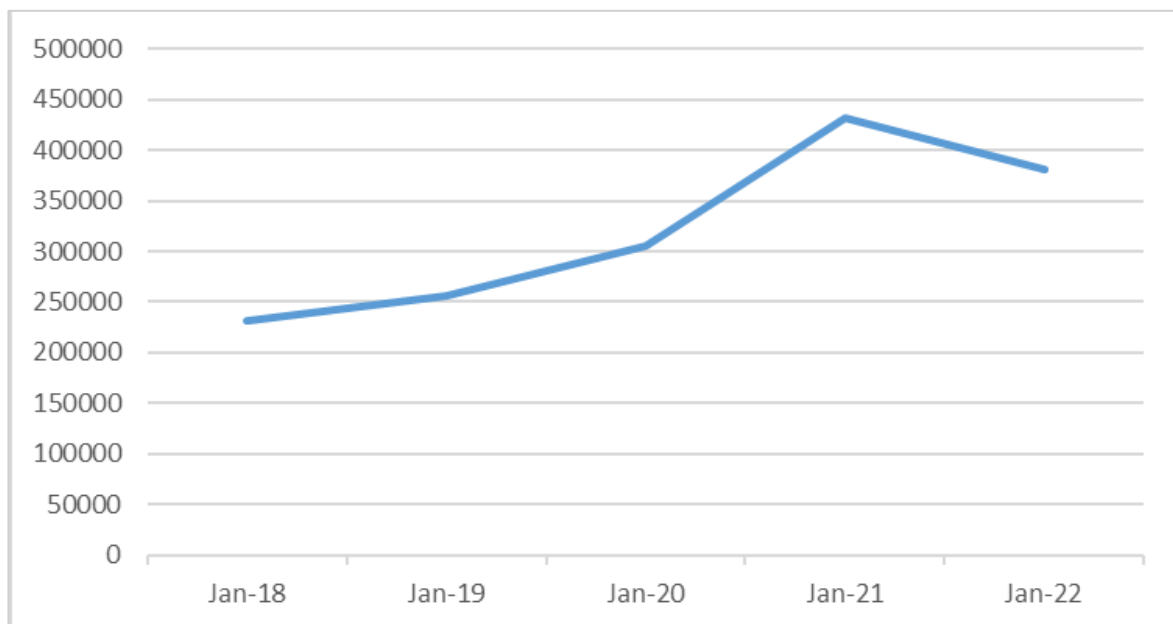
Figure 3.4: Footfall Heat Map



Source: Datscha

The figure below illustrates the busiest area of the High Street in relation to the concentration of footfall for the month of September between 2018 and 2021 to show trends over the last 5 years. The graph shows that before the COVID-19 pandemic footfall within the centre wasn't as high as it currently is. This could be due to local residents shopping elsewhere as Carshalton is within close proximity to many other centres, and the pandemic increased the amount of residents shopping locally. The YoY trend (September 2022) is **-11.73%** which is large dip from 2021 and could imply that people are beginning to revert back to pre-pandemic trends.

Figure 3.5: Carshalton September Footfall (2018-2022)



Source: Datscha

Accessibility:

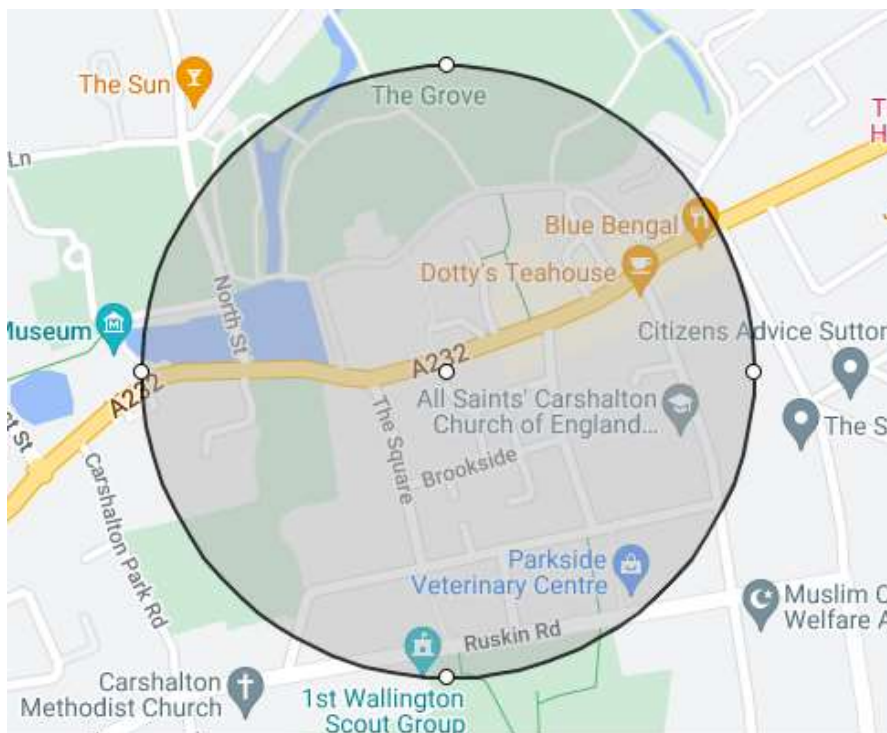
Carshalton railway station is not located within the town centre and is therefore slightly disconnected from the town centre, located approximately 0.3 miles away. This station provides good connections to London and other surrounding centres. Bus services are also provided on the north and south side of the High Street and bus stops are located throughout the town centre.

The town centre is very small and compact which means it is walkable although the pedestrian and road network is particularly narrow towards the western end of the town centre and widens east. There are pedestrian crossings but these are not located in the middle of the town centre but rather towards the east and west. The crossings have dropped kerbs and tactile paving, and these are also located at several crossing off the main High Street, at Carshalton Place for example, and the kerbs throughout are not raised too high. There does not appear to be much provision for cycling in terms of infrastructure, although bike racks are available across the town centre.

Crime and Safety:

A postcode within the Carshalton high street was chosen as a benchmark for crime within the town centre and compared to the overall Sutton average. The radius of the area is 250m (shown below) and this is compared with the Sutton Borough average of the same radius. The data, obtained from CrimeRate, is aggregated from open police force data, social media signals and file FIO requests with local police departments.

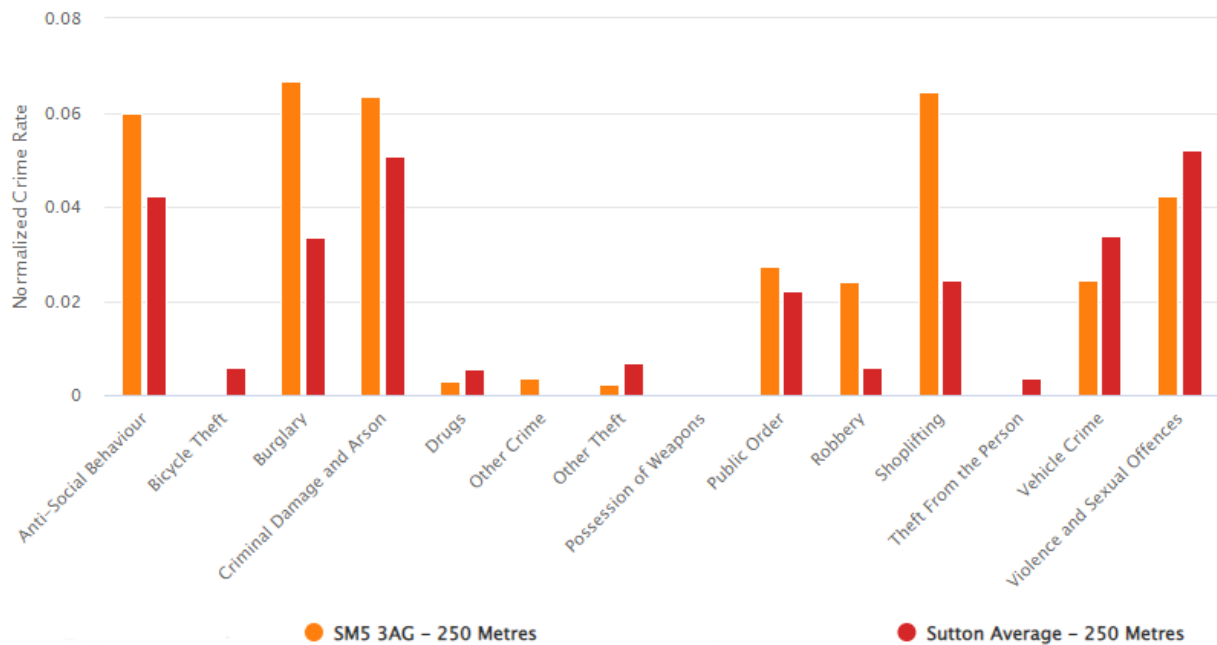
Figure 3.6: 250m Benchmark Radius



Source: mapdevelopers

The figure overleaf shows that the most common crimes reported are Burglary; Criminal Damage and Arson; Shoplifting and Anti-Social Behaviour. With the exception of Public Order and Robbery, the remaining types of crime reported are lower than the Sutton Average, and there were no reported crimes relating to Bicycle Theft, Possession of Weapons or Theft from the Person.

Figure 3.7: Crimes Reported Around SM5 3AG Compared to Sutton Average



Source: CrimeRate

Town Centre Environmental Quality:

The centre boundary lies within a wider Conservation Area and the town benefits from attractive buildings with some historic buildings dating back to the Middle Ages and the early 19th Century. The Carshalton All Saints Church, a Grade II* listed building, overlooks the Pond which leads to The Grove providing the centre with a great mix of heritage, green and blue infrastructure.

In general, the town centre has an overall good appearance with a lot of character and visual interest. However, the derelict pub and the Beacon Grove area detract from the environmental quality of the town centre and the town centre would greatly benefit from redevelopment.

Barriers to Business:

The same external influences highlighted in the assessment for Sutton Town Centre will apply to Carshalton (e.g. Cost of Living, Brexit, Global Climate Emergency, Digital Connectivity, Inflation, Online Shopping).

These influences have led to rising operational costs for town centre businesses and a shortage of labour. There are also latent challenges for businesses such as high businesses rates and upward only rental systems which are barrier to businesses viability and growth, particularly as town centre businesses are still trading at depressed levels (since pre-COVID times).

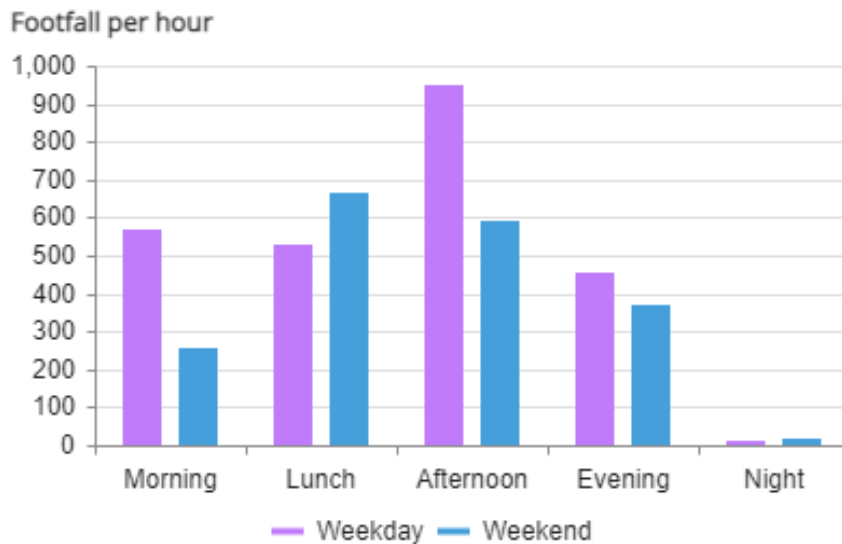
For Carshalton, these economic barriers are likely to limit the growth and expansion of businesses in the centre.

Evening and Night time Economy:

The figure overleaf shows that in comparison to other times of the day, Carshalton does not have a strong night time economy when considering footfall levels, however it appears to have a relatively strong evening economy, with weekend levels being higher in the evening than in the morning.

During the week the levels of footfall are similar in the morning, lunch and evening times, but peak in the afternoon where footfall is the highest.

Figure 3.8: Carshalton Weekly Footfall Average



Source: Datscha

Convenience retail and leisure services support the evening economy most with the Sainsbury's Local and Co-Op remaining open until 11pm and hot food takeaways such as Dominos and Pizza Go-Go open until midnight. These operators are focused along the High Street, while the retailers near, and along Beacon Grove, close much earlier resulting in limited evening economy and less footfall in that part of town.

Conclusions:

Carshalton District Centre is considered to be a vital and viable centre that has many attractive features such as its heritage buildings and nearby green spaces. Whilst the town's retail offer is relatively small in scale it has smaller formatted national multiples such as a Sainsbury's Local and a strong independent retail offer. Footfall data indicates that the centre is generating good levels of footfall from morning to evening times and this is largely concentrated along the High Street. The town is well located and has good connections to surrounding residential areas, albeit slightly disconnected from Carshalton Station which is located north of the centre.

Development potential in Carshalton is constrained by the centre's Conservation Area designation and by its road network. There are also some vacant buildings which diminish the town centre quality, in particular the vacant Fox and Hounds public house, while the Beacon Grove area lacks environment quality. However, these could be potential areas for future development, refurbishment and enhancements which could improve the town centres as a whole.

4.0 CHEAM DISTRICT CENTRE HEALTH CHECK

Overview:

Cheam District Centre is formerly a village town on a crossroads located on the western edge of the Sutton Borough boundary. This centre has retained a lot of its historic and cultural value, located in a Conservation Area and adjacent to Nonsuch Park. A railway runs directly south of centre and Cheam station is just outside the town centre boundary which benefits the town, making it more accessible.

The town's commercial activity is concentrated along The Broadway and High Street where a mixture of anchor retailers and independents are located. Key foodstores include a Sainsbury's Local and a Little Waitrose and there is a prominent office block, under alteration, along the south west quadrant which shortens the Primary Shopping Frontage.

Figure 4.1: District Centre Boundary



Source: London Borough of Sutton Local Plan Polices Map

Diversity of Uses:

Cheam has a total of 140 retail outlets with a relatively even spread of diverse retail categories. Retail Services have the highest number of outlets (36) and there is a noticeably strong presence of hair and beauty salons, laundrettes and other health services within the centre.

Leisure Service has a substantial quantum of floorspace, with 5,309 sqm and makes up almost a third of the entire retail space which is 6 percentage points higher than the national average. This is due to the number of cafes, bakeries, restaurants and takeaways through the centre.

Comparison and Financial & Business Services have a similar representation (25 and 26 outlets respectively) and have a combined total of around 3,500 sqm. Although, the latter has over double the representation in the number of units compared to the UK average and the former a third less than the average. However, in relation to floorspace, Financial Services is more even, and comparison retail is substantially lower, with less than half the floorspace compared to the UK average.

Although convenience retail only has 8 outlets, it totals almost 2,000 sqm of floorspace but is still slightly below the UK average. The main convenience retail offer is from the two key foodstores, Sainsbury's Local and Little Waitrose.

Less than 10% of commercial outlets are vacant but this represents over 3,000 sqm of floorspace, which is 18% of the total floorspace in Cheam. This means that the buildings which are vacant are larger units and include the 2 vacant banks and results in the overall vacant floorspace in Cheam being slightly higher than the national average.

Table 4.1: Units and Floor space in Cheam District Centre

	No. of Outlets	No. of Outlets (%)	UK Average	No. of Floorspace	No. of Floorspace (%)	UK Average
Convenience	8	6%	9%	1957	12%	16%
Comparison	25	18%	27%	2065	12%	30%
Retail Service	36	26%	16%	2843	17%	7%
Leisure Service	34	24%	25%	5309	32%	26%
Financial & Business Service	26	19%	9%	1635	10%	7%
Vacant	11	8%	14%	3025	18%	14%
Total	140	100%	100%	16834	100%	100%

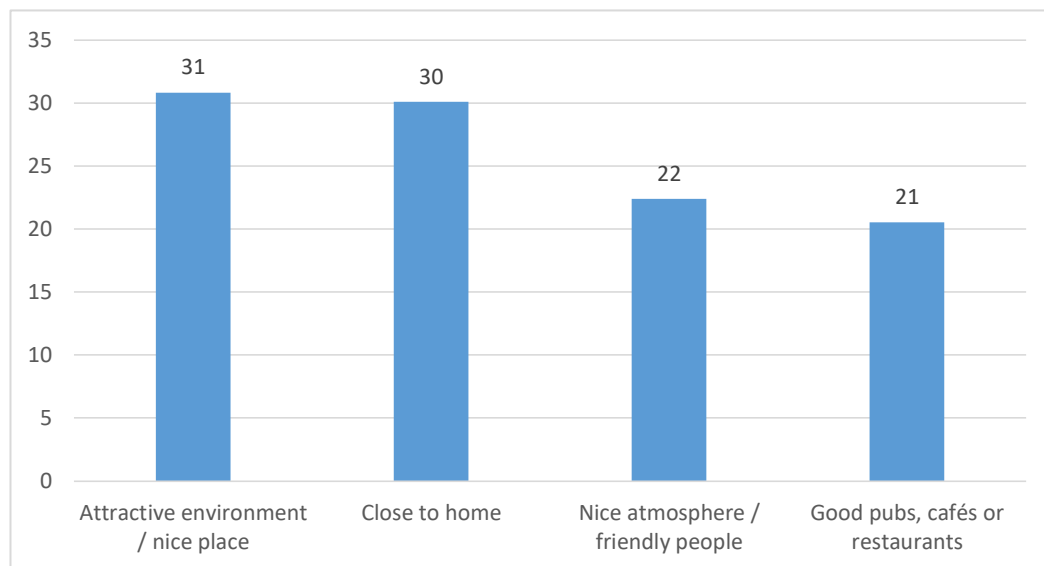
Source: LB Sutton Council Survey Data, 2022; Experian Goad

Customer Perceptions:

What do you like about Cheam?

Survey participants like that Cheam has an attractive environment and a nice atmosphere which has good pubs and cafes and is close to home. Other responses included the good range of independent shops, traditional nature of the centre and the food stores, all of which scored the same amount.

Figure 4.2: Key responses to what respondents like most about Cheam



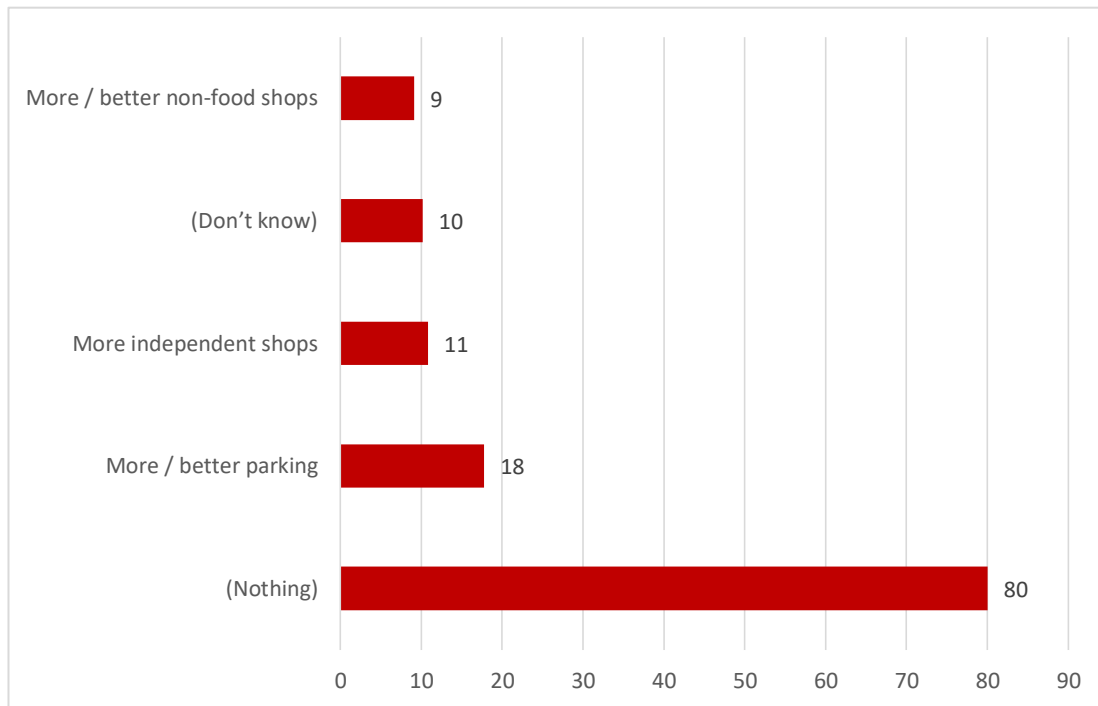
Source: Q29 HTIS (Volume E)

What improvements would make you visit Cheam more often?

Considering the top five answers, 80% of respondents answered that nothing would make them visit

the centre more often, which could suggest that they are satisfied with Cheam and this also applied to the follow up question, about what would encourage survey participants to visit the centre more in the evening, the majority answering 'nothing'. It could also imply that participants did not have any suggestions that could make them visit the centre more.

Figure 4.3: Key responses to suggested improvements for Cheam



Source: Q30, HTIS (Volume E)

Retail and Leisure Representation:

Cheam has a strong independent retailer representation and has only a few national multiples including a Sainsbury's Local, Costa Coffee, Caffè Nero, Pizza Express and a Little Waitrose. There is a village market which operates every Friday at the Parochial Halls and offers a variety of goods, including homemade, second hand and new goods.

A review of retail and leisure requirements for Cheam brought up the same result as Carshalton, with Savers and Lidl both seeking sites in the centre. The requirements are set out in the table below:

Table 4.2: Retailer Requirements for Cheam District Centre

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Mar-22	Savers	Non-food retailer	186	279
Mar-22	Lidl	Discount foodstore	1,672	2,462
	Total		1,858	2,741

Source: The Requirement List, Nov 2022

Pedestrian Flows:

The Broadway appears to have the highest level of footfall, although the four roads comprising the crossroads unsurprisingly have a similar footfall count. Footfall drops along the roads and linkages to Nonsuch Park, although footfall is much higher along Tudor Close further north, which is likely where most people access the Park from.

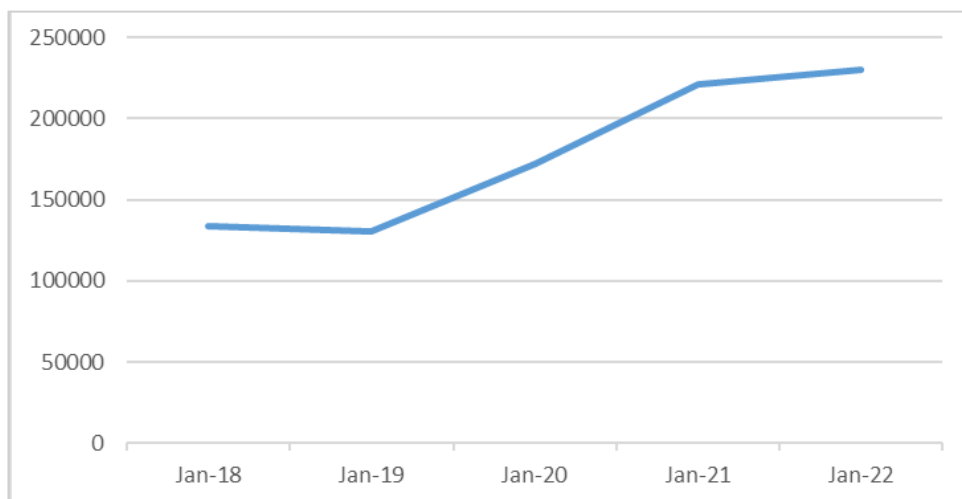
Figure 4.4: Footfall Heat Map



Source: Datscha

The figure below shows the footfall data taken from the busiest section of high street for the month of September between 2018 and 2021 to show trends over the last 5 years. It shows that footfall has gradually increased since 2019 and the YoY trend (September 2022) is +4% from the year prior, which is very positive as people appearing to be continuing to shop local.

Figure 4.5: Cheam September Footfall (2018-2022)



Source: Datscha

Accessibility:

The town is set around a crossroads and is very compact and walkable with plenty of areas to cross, with dropped kerbs and tactile paving. The traffic did not appear to be moving too fast, assisted by the centre supporting a 20mph zone, although there is noticeably heavy traffic which flows through the centre. The footpaths are wide and many pedestrian pathways have a grass verge or on-street car parking which provides a buffer and a safer pedestrian environment.

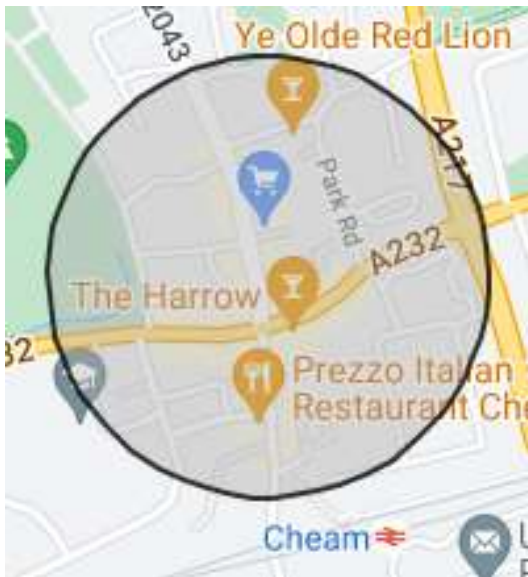
Although the roads are rather busy the pedestrian experience does not feel unsafe. There are several bus stops located throughout the centre and Cheam train station is located just to the south of the town and is well located and pedestrians can cross under the tracks to access to the town

safely.

Crime and safety:

A postcode within the Cheam high street was chosen as a benchmark for crime within the centre and compared to the overall Sutton average. The radius of the area is 250m (shown below) and this is compared with the Sutton Borough average of the same radius. The data, obtained from CrimeRate, is aggregated from open police force data, social media signals and file FIO requests with local police departments.

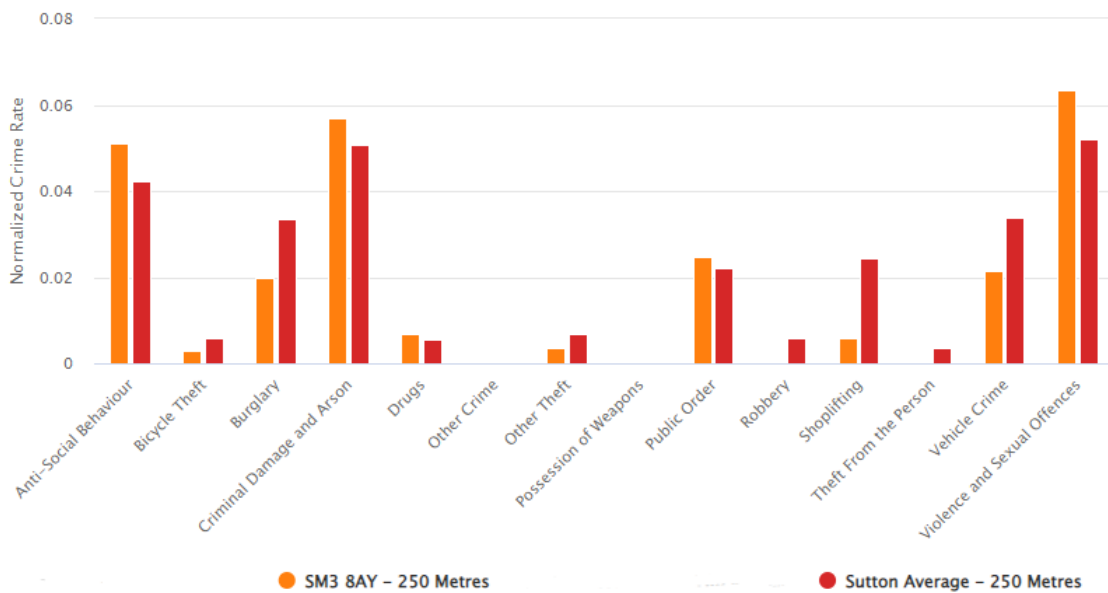
Figure 4.6: 250m Benchmark Radius



Source: mapdevelopers

The figure below shows that the most common crime reported in Cheam Violence and Sexual Offences along with Criminal Damage and Arson and Anti-Social Behaviour, which is reported almost twice as much as the Violence and Sexual offences. The Sutton average has a higher crime rate in relation to Burglary, Shoplifting and Vehicle Crime. In general, the levels of crime are similar in Cheam as the Sutton average.

Figure 4.7: Crimes Reported Around SM3 8AY Compared to Sutton Average



Source: CrimeRate

Town Centre Environmental Quality:

The town is located in a designated Conservation Area and has many listed buildings, particularly towards the northern part of the centre, some dating back to the 16th Century. The centre benefits from the majority of these buildings being in very good condition, and well preserved, consequently the town as a high environmental quality with a lot of visual interest. Some modern buildings are also designed in a mock-Tudor style which maintains the town's character and historic setting.

The centre has some greenery throughout mostly around the crossroad intersection, although the town does not appear overly 'hard' due to the historic buildings, the existing mature trees and close proximity to Nonsuch Park. There are some trees and flowers planted throughout and this could be enhanced, or better maintained, to soften the urban landscape more, especially with the busy intersection which diminishes the town centre quality. The town also benefits from being near Nonsuch Park, a wide open green space with trees and rivers running through, although wayfinding within the centre for Nonsuch Park could be improved.

There are some prominent vacancies which detract from the environmental quality and the town would benefit from these being occupied and allow for more commercial diversification.

Barriers to Business:

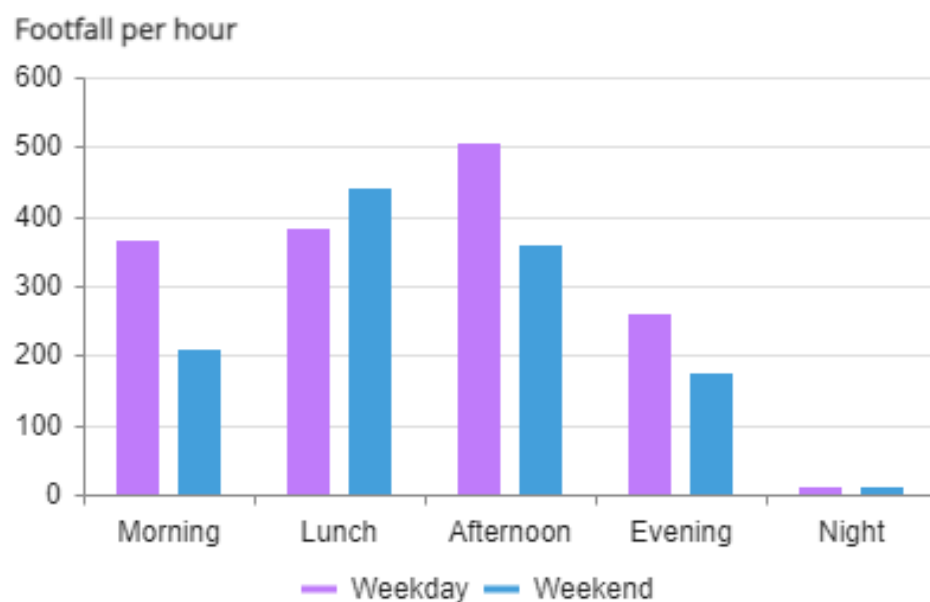
The same external economic pressures and commercial constraints (e.g. high business rates and upwards only rental systems) that were reported for Carshalton District Centre apply to Cheam in respect to barriers to business.

Responses from stakeholders did not identify specific issues to barriers to business.

Evening and Night time Economy:

The figure below again highlights the lack of a night time economy as the level of footfall is substantially lower than at other parts of the day. Across the other hours of the day, Cheam has a reasonably well balanced footfall presence throughout the entire week, the only exception appears to be weekend mornings.

Figure 4.8: Cheam Village Weekly Footfall Average



Source: Datscha

Conclusions:

Cheam District Centre has an attractive centre with a lot of heritage, with some buildings dating back to the 16th Century. The centre is made up of four quadrants around a cross roads and as a result is compact, walkable but experiences high volumes of traffic flowing through it. The busy crossroads impacts on the visual aesthetic of the town and the level of accessibility, is likely to be contributing to noise and air pollution. There are some prominent vacancies and the town has an above average vacancy rate (both in terms of outlet numbers and floorspace). There is some alteration works happening within the town but further development opportunity is likely to be fairly restrictive given the nature of the centre, and consist mainly of refurbishment and enhancements, particularly along the northern quadrant frontages where there are many listed buildings.

The commercial offer is orientated largely around Leisure Services which represents around a third of the overall commercial floorspace. There are some major retailers such as Sainsbury's and Waitrose, although they are occupying smaller spaces using smaller formatted foodstores (Sainsbury's Local and Little Waitrose respectively) in keeping with the towns character, setting and available space.

Overall, despite some pressures the town may be facing, there are signs of investment and good levels of footfall and a lot of independent retail representation and is considered to be a vital and viable town.

5.0 HACKBRIDGE DISTRICT CENTRE

Overview:

Hackbridge is the smallest of the Borough's district centre located in the north east of Sutton Borough and does not have designated Primary or Secondary shopping frontages. The majority of the commercial outlets are located to the north of the centre, along London Road, and there has been recent development around Spinning Wheel Way including the mixed-use New Mill Quarter Development.

Lidl have now located here subsequent to the increase in housing in Hackbridge and the town is expected to accommodate significant growth. Currently, the centre has limited retail and service offer, which presents opportunities for future investment in town centre uses.

Figure 5.1: Hackbridge District Centre Boundary



Source: London Borough of Sutton Local Plan Polices Map

Diversity of Uses:

Hackbridge has a total of 29 commercial outlets which have a combined total of 7,112 sqm of floorspace. The vast majority of retail floorspace is taken up by convenience retail, which represents around 80% of the total retail floorspace and 43% of the overall commercial floorspace in Hackbridge, with a total of 3,044 sqm. This is a result of the two key anchor stores being the new Lidl store and the Sainsbury's Local, and are the only units which have a more substantial footprint in comparison to the other units. This figure is also significantly higher than the UK average, which is approximately 16%.

The remaining retail offer is made up of 4 comparison outlets with a total floorspace of 696 sqm, which only represents 10% of the overall commercial offer, and 20 percentage points lower than the UK average.

There 19 commercial services outlets, the majority of which comprise Retail Service (10) and Leisure Service (7). The combined floorspace of the service sectors represents 40% of the overall commercial floorspace offer and the proportion of floorspace occupied by Retail Service is much higher than UK average (21% and 7% respectively). In contrast, the proportion of floorspace occupied by Leisure Services is much lower than the UK average (8% and 26% respectively). However, this is not that surprising given that the centre is very small and has limited F&B offer which often contribute to leisure service floorspace.

Table 5.1: Units and Floor space in Hackbridge District Centre

	No. of Outlets	No. of Outlets (%)	UK Average	No. of Floorspace	No. of Floorspace (%)	UK Average
Convenience	4	14%	9%	3044	43%	16%
Comparison	4	14%	27%	696	10%	30%
Retail Service	10	34%	16%	1482	21%	7%
Leisure Service	7	24%	25%	584	8%	26%
Financial & Business Service	2	7%	9%	759	11%	7%
Vacant	2	7%	14%	547	8%	14%
Total	29	100%	100%	7112	100%	100%

Source: LB Sutton Council Survey Data, 2022; Experian Goad

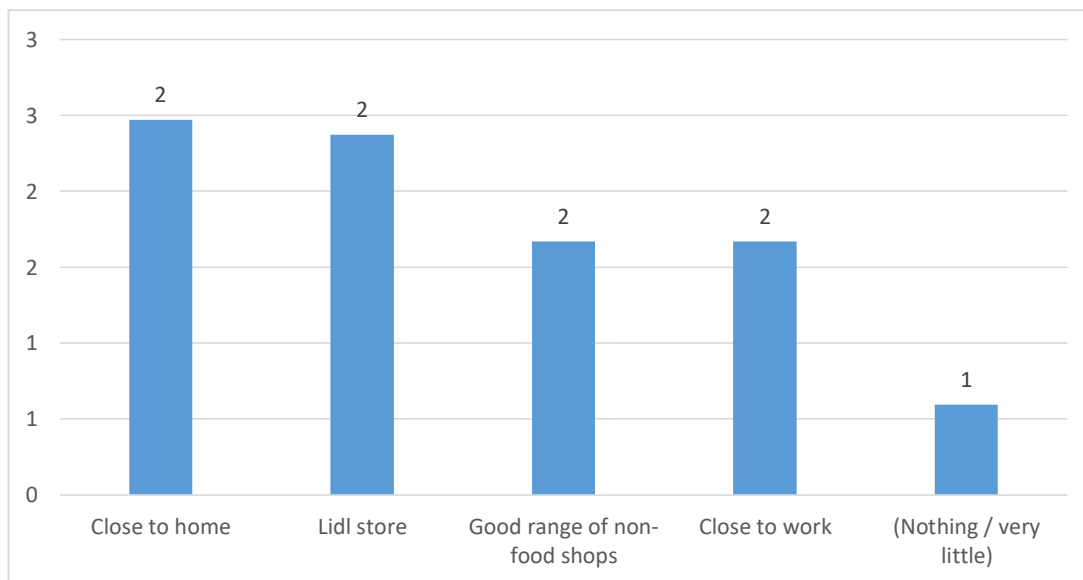
There are only 2 recorded vacancies with a total floorspace of 547 sqm, which represents 8% of the total floorspace and is lower than the national average.

Customer Perceptions:

What do you like about Hackbridge?

The most common responses relating to why survey participants liked Hackbridge were because of how closely related the centre is to their homes and work, the Lidl store and the range of non-food shops. The subsequent questions relating to improvements mostly found respondents answering nothing, again suggesting that they are content with the centre.

Figure 5.2: Key responses to what respondents like most about Hackbridge



Source: Q29 HTIS (Volume E)

Retail and Leisure Representation:

Due to the small scale of the centre, there is a limited offer in relation to national multiples. The town has a Sainsbury's Local which also facilitates an Argos Collection Point. There is also a relatively new Lidl foodstore (which opened around February 2021) which opened on Spinning Wheel Way and where the new residential development was built. The vast majority of all other retail outlets are independents.

There were no retailer requirements identified via the Requirements List but it has been noted that Lidl, who are seeking a location in the surrounding District Centres, have recently located here.

Pedestrian Flows:

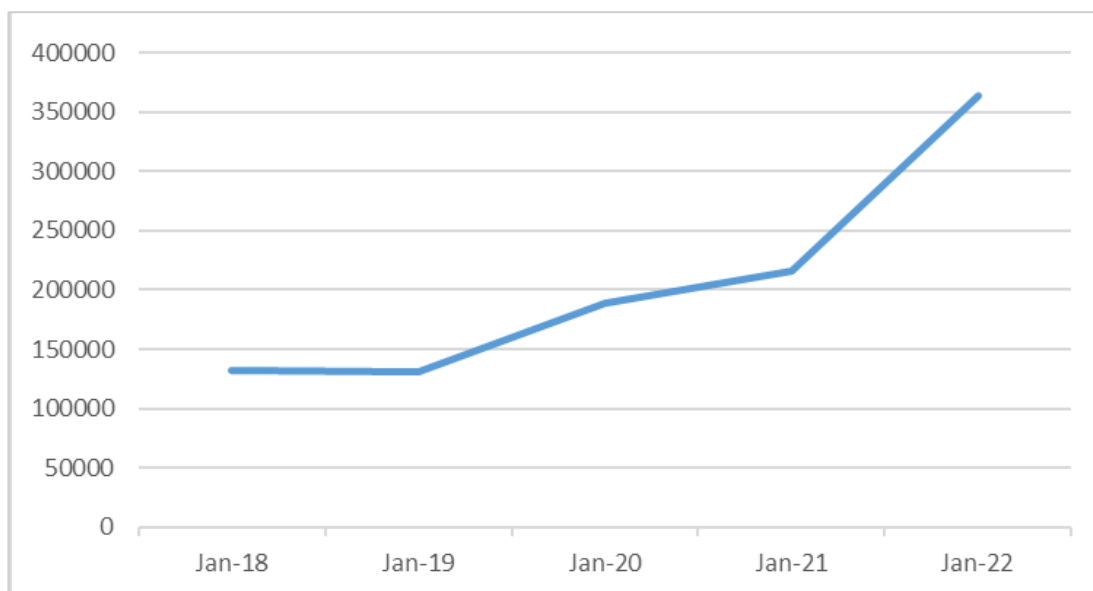
The most concentrated levels of footfall are around the roundabout where the majority of retail units are located, including a Sainsbury's Local.

Figure 5.3: Footfall Heat Map



The figure below shows the footfall data for the highest concentration of the High Street for the month of September between 2018 and 2021 to show trends over the last 5 years. The figure shows that before the COVID-19 pandemic footfall within the centre wasn't as high as it currently is. Like Carshalton, this could be due to local residents shopping elsewhere pre-2019 and the pandemic increased the amount of residents shopping locally. The YoY trend (September 2022) is **+69.22%** which is substantial increase from 2021. This could imply that the centre's footfall is on the rise as a result of the new residential developments.

Figure 5.4: Hackbridge September Footfall (2018-2022)



Source: Datscha

Accessibility:

Hackbridge has very small centre core, with many of the shops and facilities located near or around the roundabout. The centre is very walkable and pedestrian friendly, with wide paving, very low kerb heights, public seating and bicycle racks to secure bikes to. Residential properties and developments are located directly beside what would be considered the town centre core and the centre would likely be used mostly by local residents, however, the Sainsbury's Local, Argos and new Lidl foodstore would likely attract people from nearby locations.

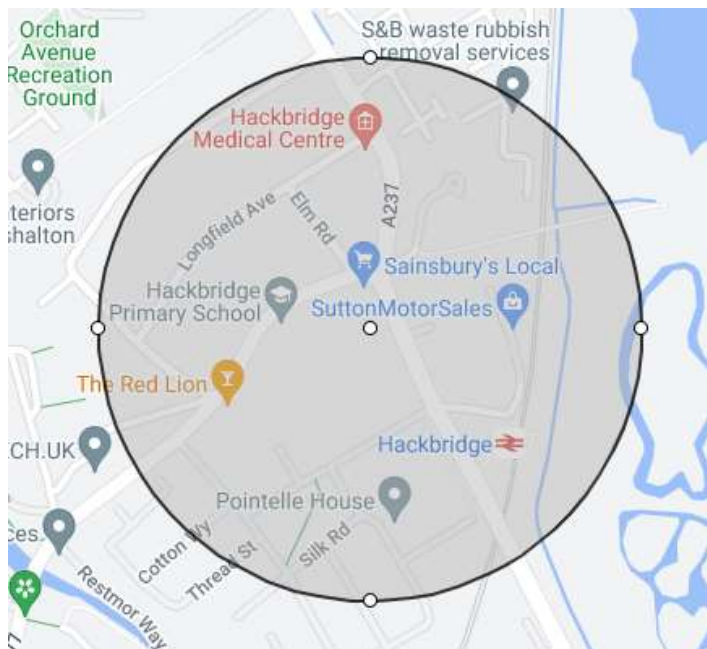
Although small, the A237 road running through the centre is busy and there is a need for the pedestrian crossings which are provided with dropped kerbs and tactile paving.

The Railway Station is located at the southern end of the centre and has connections to London and other, more local, areas and according to the District Centre Health Check (2022) has 65 car parking spaces. The town also has 3 main bus routes; 80; 127 and 151.

Crime and Safety:

A postcode within the Hackbridge high street was chosen as a benchmark for crime within the centre and compared to the overall Sutton average. The radius of the area is 250m (shown below) and this is compared with the Sutton Borough average of the same radius. The data, obtained from CrimeRate, is aggregated from open police force data, social media signals and file FIO requests with local police departments.

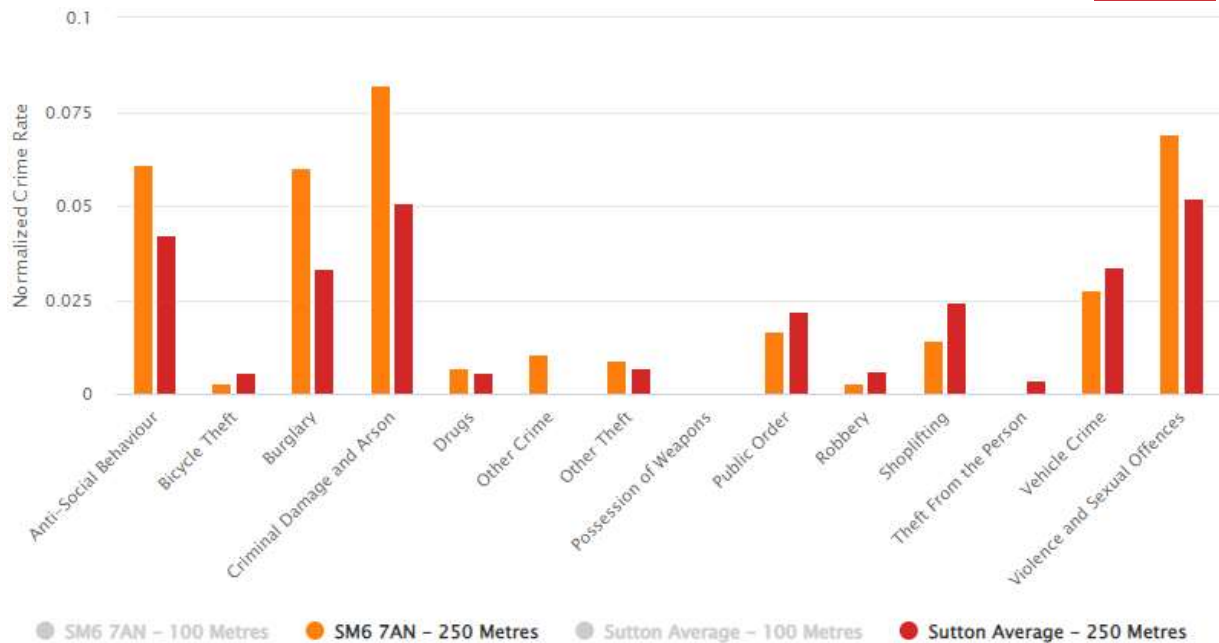
Figure 5.4: 250m Benchmark Radius



Source: mapdevelopers

The figure overleaf shows that the most common crimes reported are Burglary; Criminal Damage and Arson; Violence and Sexual Offences; Burglary and Anti-Social Behaviour. With the exception of Other Theft and Other Crime, the remaining types of crime reported are lower than the Sutton Average.

Figure 5.6: Crimes Reported Around SM6 7AN Compared to Sutton Average



Source: CrimeRate

Town Centre Environmental Quality:

The centre has no identified shopping frontages, in terms of planning policy, and there are very limited active frontages within the centre. New residential developments have been built towards the south west end of the centre and consequently the areas now has new paving with raised plant beds, urban greening along the road, new trees.

As a consequence of the new development, there is a an obvious contrast between the modern 4-5 storey buildings which are oppisite rows of older terrace housing, and result in the west side of the centre having more contemporary, larger units and the east side having smaller, older buildings and housing.

The New Mill Quarter Development provides a feeling of investment with new pavements and new tree planting. This currently makes the centre feel fresh and benefits the towns overall experience due to the attractive and modern public realm.

Barriers to Business:

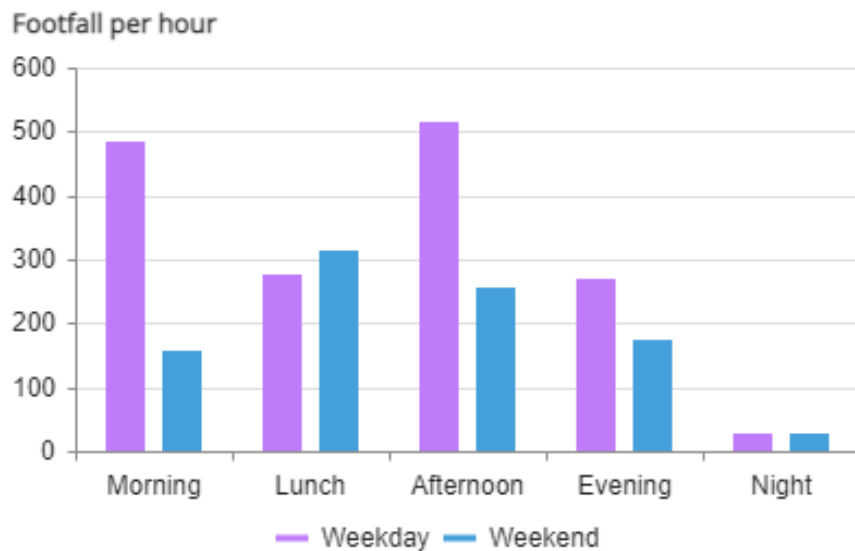
The same external economic pressures and commercial constraints (e.g. high business rates and upwards only rental systems) that were reported for Carshalton District Centre apply to Hackbridge in respect to barriers to business.

Responses from stakeholders did not identify specific issues to barriers to business.

Evening and Night time Economy:

The figure overleaf shows that in comparison to other times of the day, Hackbridge does not have a strrong night time economy. Footfall is at its highest during weekdays at morning and afternoon, which could be the result of the morning commute, and the afternoon timeframe spans from 2pm-5pm which could include people on their lunch breaks and finishing work. The lunch and evening economy in relation to footfall per hour is comparable between weekdays and weekends, but it is clear that footfall throughout the the week is relatively low.

Figure 5.7: Hackbridge Weekly Footfall Average



Source: Datscha

Conclusions:

Hackbridge District Centre is the smallest of the Borough's District Centres and does not have any identified shopping frontages. Although there is a substantial amount of new residential development, the centre itself does not have a lot of retail and service offer, which may not meet demand for future residents. The existing Lidl will be a main driver of footfall and offers the opportunity to support new town centre businesses.

The train station to the south of the centre provides good connections to Central London and other surrounding areas. The centre also benefits from a nearby park and the new housing development has included investment in the public realm including paving and urban greening. Hackbridge's resident population is likely to grow in the future and there will be a need for Primary Shopping Areas to control development and maintain a core.

Overall, Hackbridge is considered to be small but vital and viable centre that has good prospects to strengthen its profile as further housing development takes place.

6.0 NORTH CHEAM DISTRICT CENTRE HEALTH CHECK

Overview:

Cheam District Centre is located between Worcester Park and Cheam Village. The centre comprises of a linear high street, London Road, where the majority of commercial outlets are located and a large Sainsbury's superstore which has additional retail within it and customer car parking provision. The town is surrounded by residential and commercial areas and is also adjacent to Fairlands Park.

There is a crossroad junction the south west end of the centre which is where the secondary shopping frontages are located and there is a prominent development site that has hoarding around it directly east from the crossroads. There has been a planning application submitted in relation to this site for a 4-7 storey mixed use scheme, to include 74 residential units and 272 sqm of commercial floorspace, which is currently under consideration.

Figure 6.1: North Cheam District Centre Boundary



Source: London Borough of Sutton Polices Map

Diversity of Uses:

There are a total of 96 commercial outlets in North Cheam and the service sectors represent almost 60% of the total number of outlets. Convenience retail only has a total of 8 outlets, which accounts for 8% of the total outlets; however in relation to floorspace convenience retail has 7,625 sqm of floorspace which is the highest proportion of floorspace by sector and represents 40% of all commercial retail floorspace, which is significantly higher than the UK average (16%). The vast majority of this floorspace is occupied by the Sainsbury's Superstore which has a substantial footprint within the centre. Other convenience stores include, Costcutter, Londis and Cheam Arena.

Comparison retail in North Cheam has 22 outlets, slightly below the UK average although in relation to floorspace, this figure is almost half that of the average. North Cheam's comparison retail largely comprises smaller, independent outlets with an average floorspace of around 140 sqm.

Leisure Services have the highest number of outlets with 28, and the most floorspace with 4,353 sqm, although these figures are in line the UK average. Retail Services have more floorspace representation with a total of 15%, compared to the UK average of 7% and Financial and Business Services floorspace is 4 percentage points lower than the baseline.

Table 6.1: Units and Floor space in North Cheam District Centre

	No. of Outlets	No. of Outlets (%)	UK Average	No. of Floorspace	No. of Floorspace (%)	UK Average
Convenience	8	8%	9%	7,625	40%	16%
Comparison	22	23%	27%	3,033	16%	30%
Retail Service	22	23%	16%	2,863	15%	7%
Leisure Service	28	29%	25%	4,353	23%	26%
Financial & Business Service	7	7%	9%	511	3%	7%
Vacant	9	9%	14%	675	4%	14%
Total	96	100%	100%	19,060	100%	100%

Source: LB Sutton Council Survey Data, 2022; Experian Goad

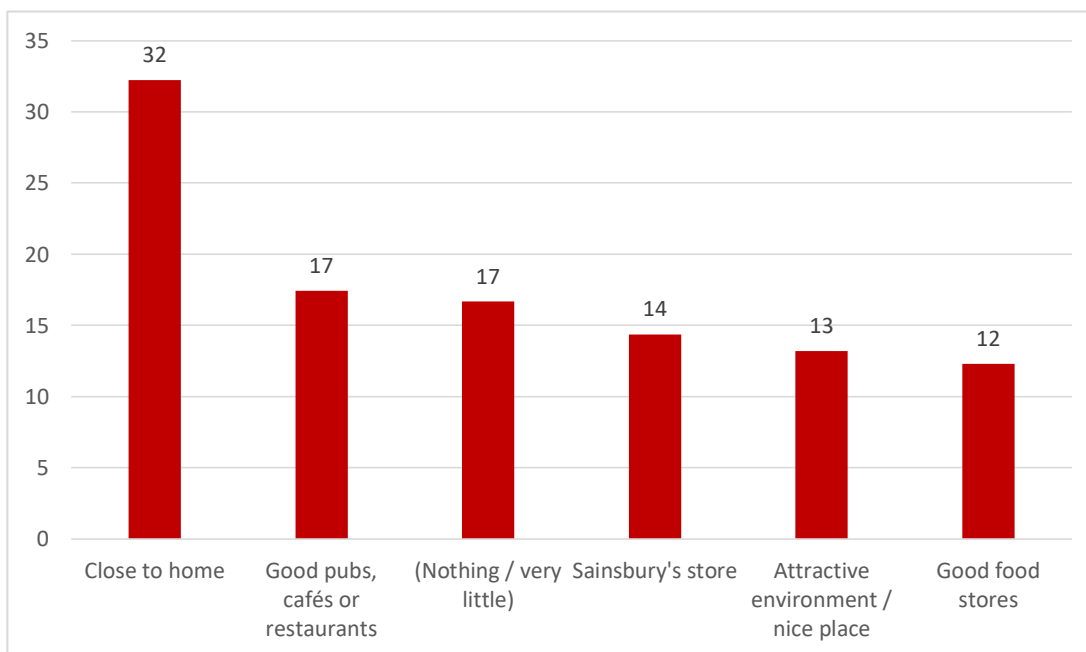
There are a total 9 vacant outlets which only represents 4% of the total floorspace, which is considerably lower than the UK average. However, this does not appear to include the development site to the east of the crossroads, which is under planning consideration.

Customer Perceptions:

What do you like about North Cheam?

The majority of respondents liked how close North Cheam is to their homes. The other attributes which gained a similar amount of responses included good pubs and cafes, the Sainsbury's store, the attractive environment and good food stores.

Figure 6.2: Key responses to what respondents like most about North Cheam

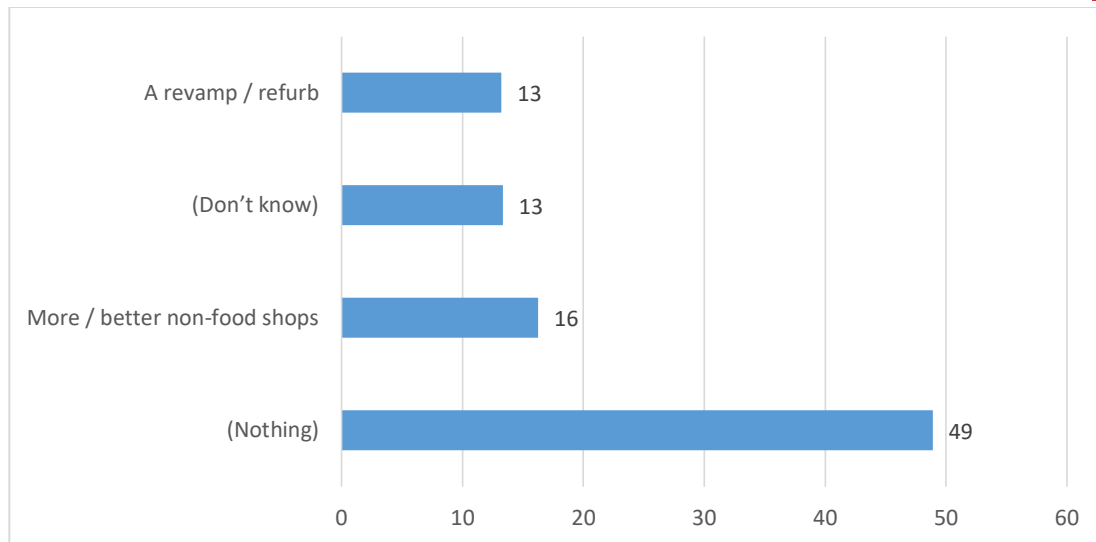


Source: Q29 HTIS (Volume E)

What improvements would make you visit North Cheam more often?

Similar to the other town centres, the vast majority of responses in relation to improvements answered that nothing would make them visit the centre more often. Not including these responses, participants identified that they felt that better non-food shops and a town centre revamp may contribute to them visiting the centre more often.

Figure 6.3: Key suggestions for North Cheam



Source: Q30 HTIS (Volume E)

What would encourage you to visit the town centre more often in the evening time?

To encourage more of an evening economy some survey participants would like more evening / leisure facilities in general. (Q31, HTIS, Volume E).

Retail and Leisure Representation:

The major retailers in North Cheam include the McDonalds and the Sainsbury's Superstore which also includes Timpson, Starbucks, Lloyds Pharmacy and Argos.

The High Street itself also has some well-known brands such as Costa Coffee, Greggs and Pizza Hut Delivery, although the majority of the town's retail provision appears to be independent driven and includes local fruit and veg shops, salons, restaurants and fast food takeaways.

The Retailer Requirement List identified Lidl as an operator seeking a location in North Cheam. The table below identifies what Lidl are seeking:

Table 6.2: Retailer Requirements for North Cheam Centre

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Mar-22	Lidl	Discount foodstore	1,672	2,462
	Total		1,858	2,741

Source: The Requirement List, Nov 2022

Pedestrian Flows:

The heat map in the figure overleaf, which illustrates levels of pedestrian activity, appears to show North Cheam as having an overall lower concentration of footfall compared to the other town centres. Footfall is highest around the pedestrian entrance to Sainsbury's and also around McDonalds, which suggests that the centre is more car dominated than the others, with people driving to North Cheam and parking at the Sainsbury's. Overall, a higher level of footfall is visible running through the centre on the A2043 compared to the A24, where the smaller outlets, secondary shopping frontages and housing is located.

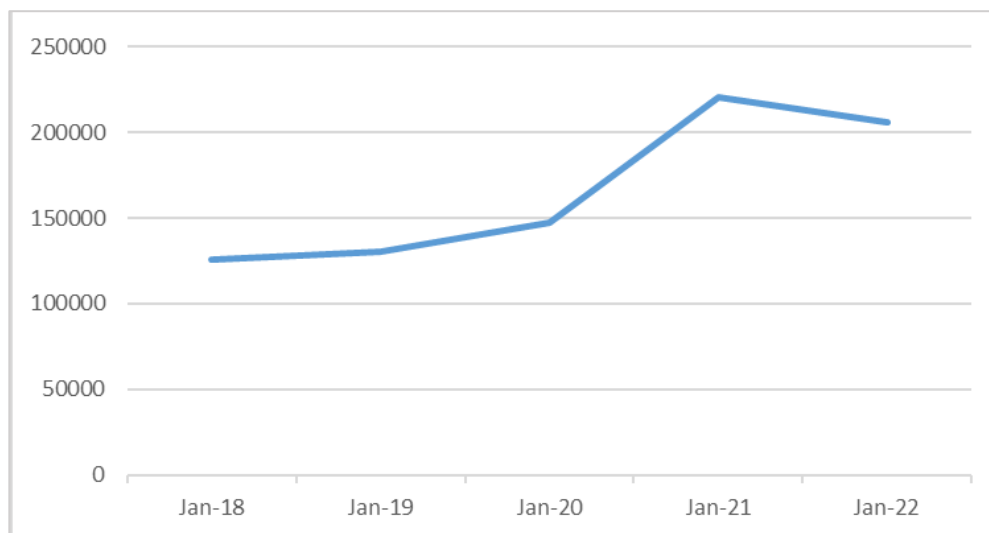
Figure 6.4: Footfall Heat Map



Source: Datscha

The figure represents the most concentrated area of footfall in the centre and how it has changed since 2018. The figure below shows that footfall has gradually increased since 2019 although the YoY trend (September 2022) is **-6.52%** from the year prior.

Figure 6.5: North Cheam September Footfall (2018-2022)



Source: Datscha

Accessibility:

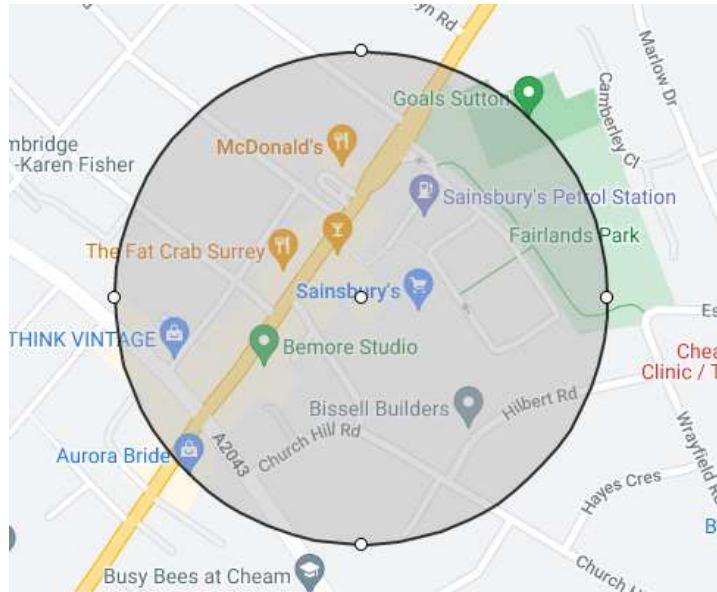
There is a very busy road junction located at the west end of the centre, although most of the centre is situated beyond it. North Cheam is not directly served by a train station but there are bus stops located along the A24 and A2043.

The primary shopping frontages are located along a major road which is not a great pedestrian environment, although the paving is wide and in good condition and there is on-street parking along parts of the roads which provides a safety buffer from the busy roads. It was noticed that the McDonalds was so busy that cars were waiting to access along the road which created further congestion. There are several crossing locations along London Road and these have tactile paving and dropped kerbs which aid pedestrians when crossing the road.

Crime and Safety:

A postcode within the Carshalton high street was chosen as a benchmark for crime within the centre and compared to the overall Sutton average. The radius of the area is 250m (shown below) and this is compared with the Sutton Borough average of the same radius. The data, obtained from CrimeRate, is aggregated from open police force data, social media signals and file FIO requests with local police departments.

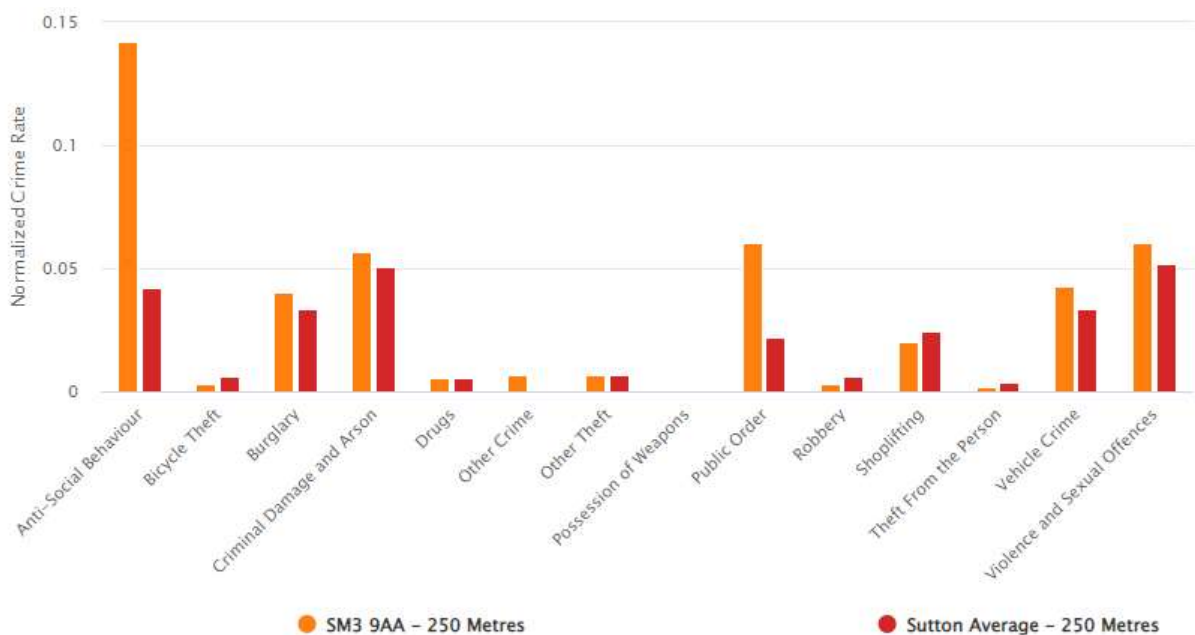
Figure 6.6: 250m Benchmark Radius



Source: mapdevelopers

The figure below shows that the most common crime reported in North Cheam is Anti-Social Behaviour and significantly higher any other crime type. Public order crime is higher in this area than the Sutton average, but the majority of the remaining crimes are relatively similar.

Figure 6.7: Crimes Reported Around SM3 9AA Compared to Sutton Average



Source: CrimeRate

Town Centre Environmental Quality:

The centre has a good mix of older and newer buildings, the majority of which are 2-3 storeys. Overall, the buildings are not in good condition with the fenestration, paintwork and facades of shops looking dated, tired or in need of repair / maintenance. The centre is dominated by two busy roads which lowers the environmental quality, as a result of the noise and air pollution, connectivity and visual quality.

The distance between the buildings on either side of the road is approximately 30m at parts which makes it appear hard its appearance and stark. As a result, compared to the other town centres North Cheam has the least aesthetically pleasing built environment largely.

The centre does not have a traditional gathering spot or core and appears to be centred around the Sainsbury's and McDonalds, both of which are heavily accessed by the car.

The town does have some urban greening which could be enhanced and there are clear areas of potential development opportunities which could increase the vitality of the town significantly, including the development site mentioned previously, which has had hoarding along the boundary for several years.

Barriers to Business:

The same external economic pressures and commercial constraints (e.g. high business rates and upwards only rental systems) that were reported for Carshalton District Centre apply to North Cheam in respect to barriers to business.

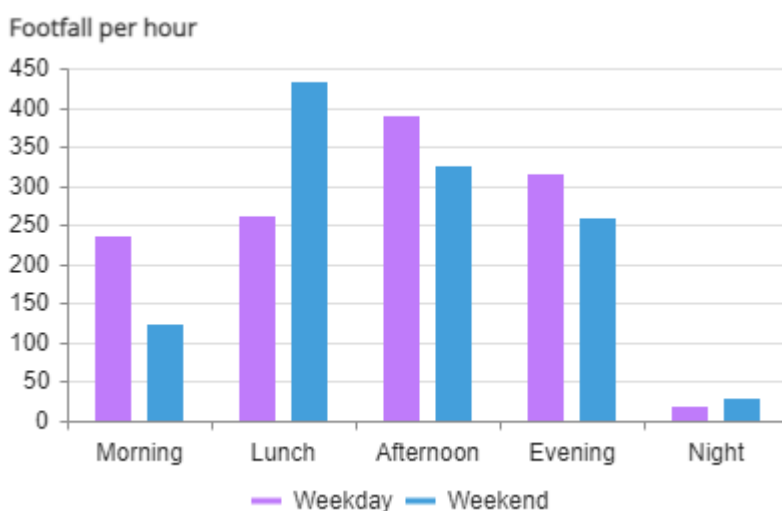
Responses from stakeholders did not identify specific issues to barriers to business.

Evening and Night time Economy:

The figure below again indicates that North Cheam appears to have a strong evening economy, and the footfall rate per hour is higher than the evenings (in both weekdays and weekends) compared to the morning. The weekend lunch is when footfall tends to peak but footfall remains relatively consistent from lunch to evening. The night time has the lowest level of footfall.

The centre benefits from the McDonalds and Sainsburys, which would attract many customers, being open 24 hours and this likely contributes to footfall levels remaining high into the evening.

Figure 5.5: North Cheam Weekly Footfall Average



Source: Datscha

Conclusions:

North Cheam District Centre's commercial retail offer largely comprises the Sainsbury's Superstore which represents 40% of the overall commercial retail floorspace. This being the main draw for customers, along with the McDonalds, means that the Sainsbury's Superstore and parking provision likely draws a lot of footfall into the centre. This highlights how important these outlets are to the area and how much the town benefits from having them located here.

The remaining shopping frontages are located along London Road and although a busy and heavily congested road, there are many small independent retailers which suggest that North Cheam has a strong independent retailer economy, such as the Cheam Arena Grocer which sells local produce.

The centre appears more dated and tired compared to the other town centres, although it does have strong weekly footfall average from morning to evening time likely due to the 24 hour opening times of the Sainsbury's and McDonalds.

The layout of the town results in the centre looking bare in parts but there are areas which have potential and there could be enhancements put in place to benefit the vitality of the town such as urban greening, local markets, developing on key sites such as the corner site to the south. Even though this site is still under consideration, it demonstrates that there is willing investment into the area and that North Cheam is a vital and viable centre.

7.0 ROSEHILL DISTRICT CENTRE

Overview:

Rosehill is located on the northern edge of the Sutton Borough boundary directly north of Sutton Town Centre. The town centre is largely around the Rosehill roundabout, a major roundabout that links the centre to other parts in and outside the Borough. The Primary Shopping Frontages are located on Wrythe Lane and includes the Lidl adjacent to the roundabout. St Helier Open Space and the St Helier Hospital are situated beyond Rosehill District Centre.

Figure 7.1: Rosehill District Centre Boundary



Source: London Borough of Sutton Polices Map

Diversity of Uses:

Rosehill has a total of 81 commercial outlets with a combined floorspace of 12,187 sqm. There are 15 convenience retail outlets in the town (representing 19%) which occupy around 3,500 sqm of floorspace, well above the UK average and the highest quantum of commercial floorspace in Rosehill. Lidl is the largest of the outlets and is the main anchor store for the town but other convenience stores include Costcutter and local independents. The proportion of comparison retail floorspace accounts for 22% of the overall floorspace which is 8 percentage points lower than the UK average.

Retail Service has the highest proportion of outlets with 19 which is almost a quarter of the total number of outlets. The floorspace occupied by Retail Services is around 1,800 sqm and represents 15% of the total, which is double the UK average. Leisure Services has the second highest quantum of floorspace with 3,149 sqm and this is on par with the UK average. Lastly, the Financial and Business Services have the lowest amount of occupied units (5) and occupied floorspace (442 sqm), both lower than the baseline averages.

There are a total of 8 vacant outlets with a total of 620 sqm of vacant floorspace, which is around 5% and well below the average which is around 14%. In relation to number of outlets, 10% of the overall commercial outlets are vacant (8) which is lower than the UK average (10% compared to 14% respectively).

Table 7.1: Units and Floor space in Rosehill District Centre

	No. of Outlets	No. of Outlets (%)	UK Average	No. of Floorspace	No. of Floorspace (%)	UK Average
Convenience	15	19%	9%	3,504	29%	16%
Comparison	17	21%	27%	2,632	22%	30%
Retail Service	19	23%	16%	1,840	15%	7%
Leisure Service	17	21%	25%	3,149	26%	26%
Financial & Business Service	5	6%	9%	442	4%	7%
Vacant	8	10%	14%	620	5%	14%
Total	81	100%	100%	12,187	100%	100%

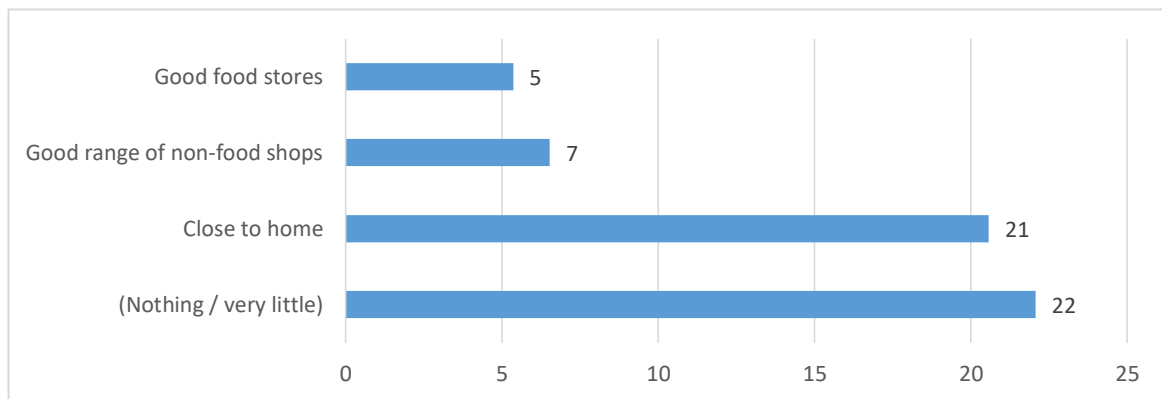
Source: LB Sutton Council Survey Data, 2022; Experian Goad

Customer Perceptions:

What do you like about Rosehill?

Nothing / very little was the most common answer for what respondents liked about Rosehill. The second most common answer included that the centre was close to homes, followed by good non-food and food stores.

Figure 7.2: Key responses to what respondents like most about Rosehill

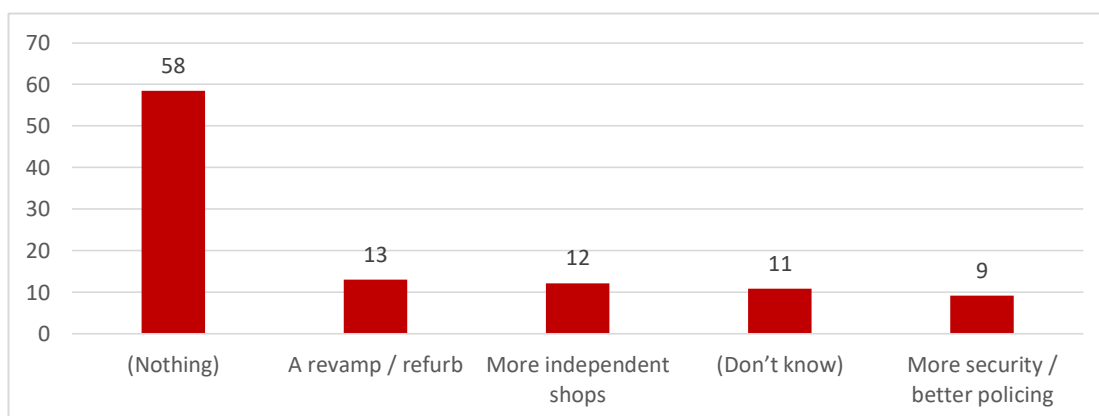


Source: Q29 HTIS (Volume E)

What improvements would make you visit Rosehill more often?

We suggest that the local inhabitants involved in the survey are happy with Rosehill as the majority stated that no improvements would make them visit more. Other responses included a revamp, more independent shops and better policing.

Figure 7.3: Key improvements that would encourage more visits to Rosehill



Source: Q30 HTIS (Volume E)

What would encourage you to visit the town centre more often in the evening time?

If we do not take into account the more neutral responses (nothing / don't know), the main attributes which participants said would encourage them to visit during the evening included better CCTV and police presence, and a safer night time environment. (Q31, HTIS, Volume E)

Retail and Leisure Representation:

Rosehill does not have many national multiples and major retailers and evidently has a strong independent retail representation. The anchor store is most notably the Lidl store which is located east of the Rosehill Roundabout. Other multiples include KFC, Costa Coffee, Superdrug, Costcutter and Betfred.

The Retailer Requirement List did not identify any retailers who are specifically seeking a location in Rosehill.

Pedestrian Flows:

The most concentrated levels of footfall are indicated to be near the entrance of the Lidl car park. There is also a high level of footfall along The Market and towards the northern part of the roundabout which is largely residential.

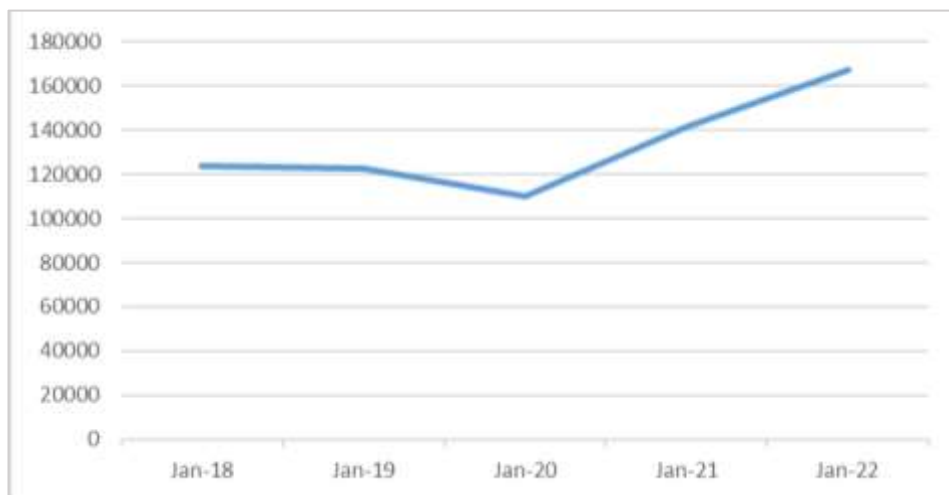
Figure 7.4: Footfall Heat Map



Source: Datscha

The figure overleaf shows the footfall data for the highest concentration of the High Street for the month of September between 2018 and 2021 to show trends over the last 5 years. Although the COVID-19 pandemic impacted on footfall, overall the level has remained relatively consistent. This is likely a result of the Lidl being the main anchor store and remaining open during the course of the lockdown. In addition, the centre is surrounded by green space which people would have used throughout lockdown for their daily exercise. The YoY trend (September 2022) is +18.15% from the year prior.

Figure 7.5: Rosehill September Footfall (2018-2022)



Source: Datscha

Accessibility:

In relation to the road network, the Rosehill roundabout is large and intricate to navigate, leading to Sutton, Carshalton, Wimbledon and Reigate and located directly opposite the Primary Shopping Frontages. This could be an obstacle / deterrent for those living on the other side of the roundabout who want to access the centre.

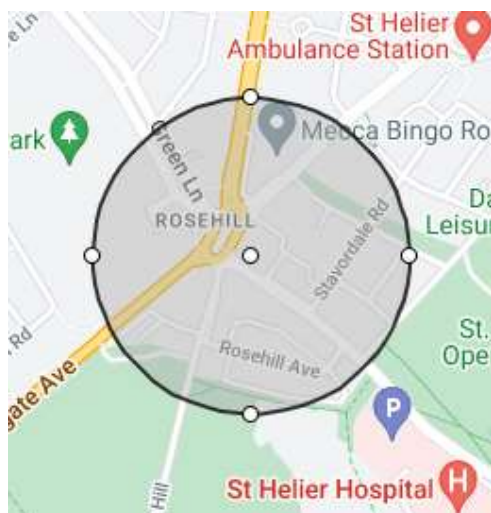
The centre itself largely comprises the outlets along Wrythe Lane and therefore the town is well defined, compact and walkable. The train station is located approximately 0.5 miles from the town although on the other side of the Rosehill Roundabout. There are bus stops throughout and car parking along Wrythe Lane and in Lidl.

The centre feels safe to walk through for pedestrians and there is tactile paving and dropped kerbs to aid crossing.

Crime and Safety:

A postcode within the Carshalton high street was chosen as a benchmark for crime within the centre and compared to the overall Sutton average. The radius of the area is 250m (shown below) and this is compared with the Sutton Borough average of the same radius. The data, obtained from CrimeRate, is aggregated from open police force data, social media signals and file FIO requests with local police departments.

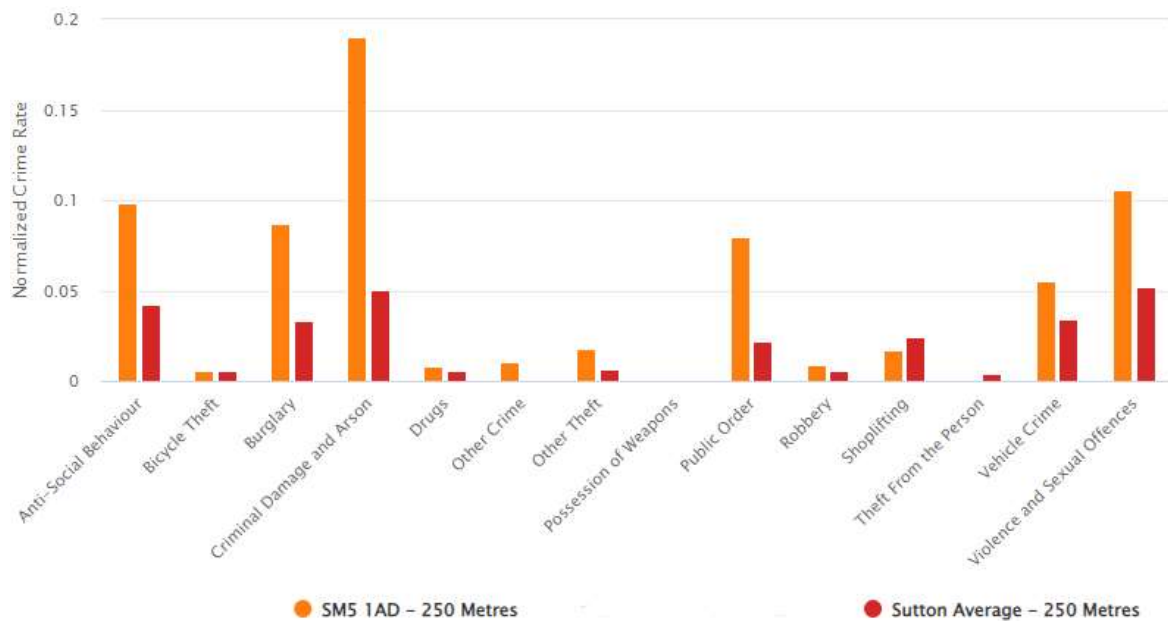
Figure 7.6: 250m Benchmark Radius



Source: mapdevelopers

The figure below shows that the most common crime reported in Rosehill is Criminal Damage and Arson which is reported almost twice as much as the Violence and Sexual offences, the second most common type of crime.

Figure 7.7: Crimes Reported Around SM6 7AN Compared to Sutton Average



Source: CrimeRate

Town Centre Environmental Quality:

Rosehill has a very attractive environmental quality and although there are several unique features that potentially detract from the character, such as the large pylon to the south and the roundabout to the north, the town centre has a pleasant shopping environment.

The buildings are largely 2-3 storey and range from Georgian style, to art deco and contemporary. Several buildings also have attractive features around the windows and fascias and chimney features which add to the overall character. The town also has trees and flowers planted throughout and is directly adjacent to St Helliers Open Space.

The centre notably has two rows of terrace housing on the north eastern side of Wrythe Lane, almost giving it a rural town appearance.

The Lidl, although anchoring the centre, is rather unattractive and facing inward, meaning that the large brick wall with advertising boards faces out onto the Primary Shopping Frontage.

Barriers to Business:

The same external economic pressures and commercial constraints (e.g. high business rates and upwards only rental systems) that were reported for Carshalton District Centre apply to Rosehill in respect to barriers to business.

Responses from stakeholders did not identify specific issues to barriers to business.

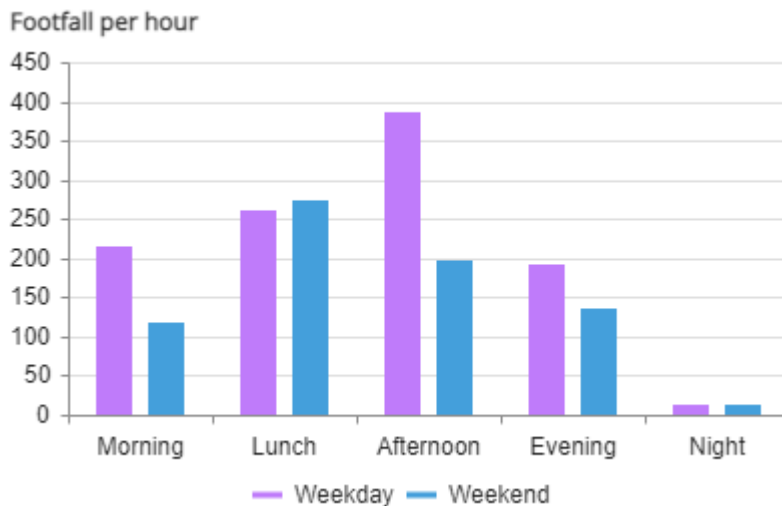
Evening and Night time Economy:

The figure overleaf shows that Rosehill also does not have a strong night time economy. Footfall is at its highest during weekdays with the exception being lunchtime where the weekend is marginally higher. The evening economy is relatively strong, higher than the morning time on weekends, and the afternoon during weekdays is when footfall peaks.

The convenient stores along the Primary Shopping Frontages remain open well into the evening, such as Lidl, Costcutter and Easy Choice closing between 20:30-22:00. The F&B outlets along the Secondary

Shopping Frontages also remain open, some until midnight and supporting the analysis of footfall figure below.

Figure 7.8: Rosehill Weekly Footfall Average



Source: Datscha

Conclusions:

Rosehill District Centre is situated between a large roundabout to the west and a large greenspace to the east which gives it a very mixed environmental quality. The buildings are attractive and the houses along the main high street give the impression of a small village, however the roundabout is very busy and is an obstacle for pedestrians which detract from the centre in terms of its accessibility.

The Lidl does not contribute to the centre’s attractive character but benefits the town as the retail anchor and supports footfall and attracting customers to Rosehill. Footfall levels are consistent throughout the day and the centre has a good evening economy with many outlets being available at all times of the day. The town does have many features and attributes which contribute to the centre’s aesthetic, including its architecture. Rosehill also has a low vacancy rate in relation to floorspace, and a strong independent retailer representation which suggests that local businesses are supported and are successful and that the town is both vital and viable.

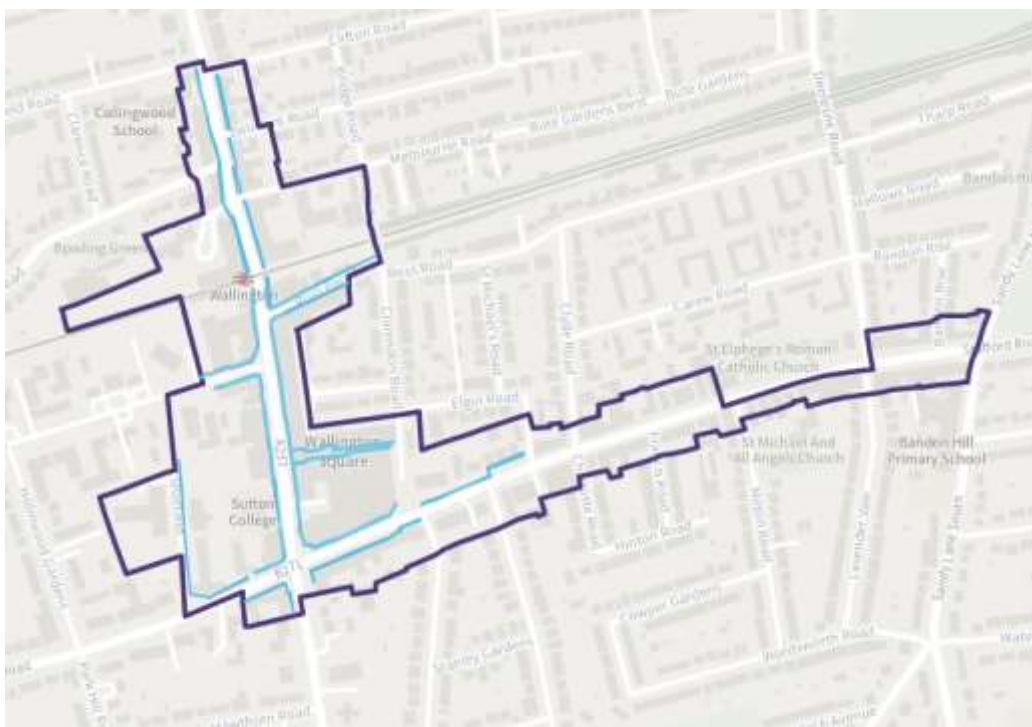
8.0 WALLINGTON DISTRICT CENTRE

Overview:

Wallington is the largest of the Borough's district centres and is located towards the eastern side of borough. The town centre boundary extends north-south along Manor Road and Woodcote Road while also extending out east along Stafford Road where many independent shops are located. The anchor store in Wallington is Sainsbury's which also provides car parking and Wallington Square which has key multiples such as Boots, Card Factory, Superdrug and Clarks.

The Primary Shopping Frontages are along Woodcote Road as far as the train station, where secondary shopping frontages continue. Woodcote Road has many national multiples including Iceland, WH Smith, Tesco, Costa, Lidl and Specsavers amongst others. The centre is well served by railway and bus services and is well connected to Central London.

Figure 8.1: Wallington District Centre Boundary



Source: London Borough of Sutton Local Plan Polices Map

Diversity of Uses:

The audit data for Wallington shows that the total number of retail units in the centre is 146. There is a good mix of retail categories with no particularly category dropping below 10% representation. The highest number of units is Leisure Services (33) which accounts for 23% and is similar to the UK average at around 25%. Leisure Services has the second highest quantum of floorspace with 6,015 sqm representing 21% of the overall commercial floorspace, which is slightly below the UK average of 26%.

Comparison and Retail Services have just 4 units less, both with 29 and each representing a total of 20% of the commercial outlets, with Retail Services having a higher proportion than the UK average, and comparison goods retail being 7 percentage points lower (20% and 27% respectively). In relation to floorspace, comparison retail has a total of 5,311 sqm, which represents only 18% of the total floorspace and 12 percentage points lower than the UK average. Retail Service floorspace occupies the least floorspace with 2,819 sqm but this is still higher than the UK average. The Finance and Business Services have a total of 27 outlets and 4,925 sqm of floorspace, which accounts for 17% of the overall commercial floorspace. Both the number of Finance and Business Services outlets and quantum of floorspace are above the UK average.

Convenience outlets has the lowest total of outlets with 14 which is on par with the national average, however convenience has the highest amount of floorspace with 7,547 sqm which accounts for 26% of the overall commercial floorspace. This is because the town has several large convenience retail anchors including Sainsbury's, Sainsbury's Local, Lidl, Tesco Express and Iceland.

Table 8.1: Units and Floor space in Wallington District Centre

	No. of Outlets	No. of Outlets (%)	UK Average	No. of Floorspace	No. of Floorspace (%)	UK Average
Convenience	14	10%	9%	7547	26%	16%
Comparison	29	20%	27%	5311	18%	30%
Retail Service	29	20%	16%	2819	10%	7%
Leisure Service	33	23%	25%	6015	21%	26%
Financial & Business Service	27	18%	9%	4925	17%	7%
Vacant	14	10%	14%	2637	9%	14%
Total	146	100%	100%	29254	100%	100%

Source: LB Sutton Council Survey Data, 2022; Experian Goad

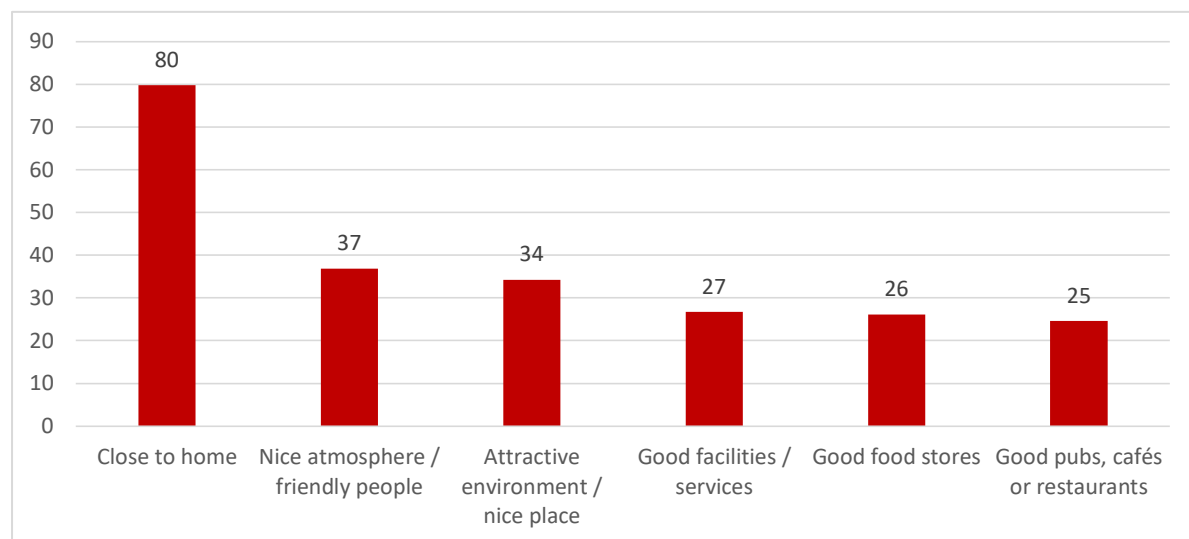
There are a total of 14 vacant units which represent approximately 10% of the total number of commercial outlets and is lower than the UK average. The lowest proportion of floorspace is vacant (2,637 sqm) which accounts for 9% of the total floorspace and 5 percentage points lower than the UK average.

Customer Perceptions:

What do you like about Wallington?

Most respondents like how close Wallington is to homes. The remaining responses were spread evenly across many different attributes and included the nice atmosphere, attractive environment and good mix of facilities and stores. This indicates that the locals are very content with their centre in appearance and what it has to offer.

Figure 8.2: Key responses on what respondents like most about Wallington

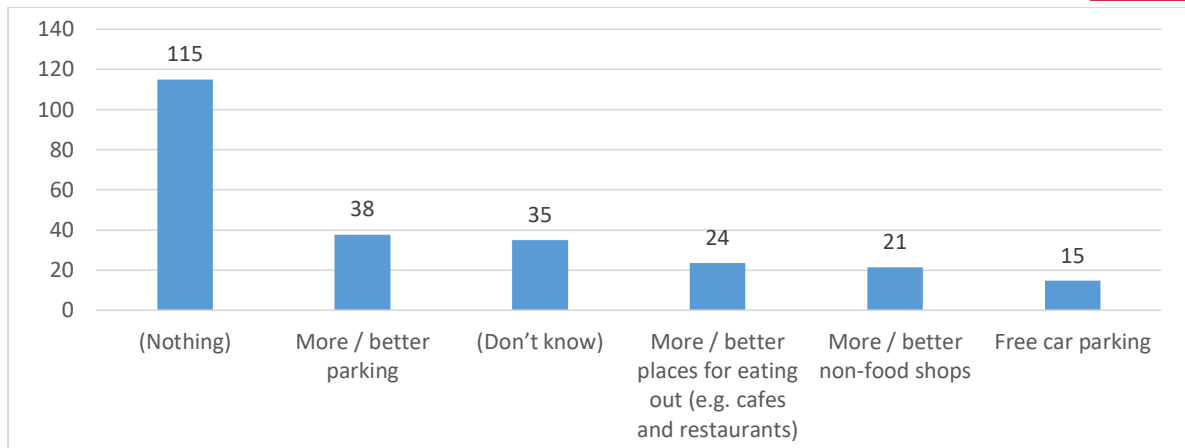


Source: Q29 HTIS (Volume E)

What improvements would make you visit Wallington more often?

While "nothing" was the most common answer, the subsequent responses were evenly spread and included more or better parking / places to eat / and non-food shops.

Figure 8.3: Key improvements that would encourage more visits to Wallington



Source: Q30 HTIS (Volume E)

What would encourage you to visit the town centre more often in the evening time?

Again, the vast number of responses for Q2 were neutral and not particular contributing to the overall analysis; however other responses included more /better cafes and restaurants and more cafes and restaurants in general.

Retail and Leisure Representation:

As previously mentioned the centre has a strong convenience national retailer multiple presence with Sainsbury's, Sainsbury's Local, Lidl, Tesco Express and Iceland. There are also many more national multiples throughout Wallington such as Caffè Nero, KFC, Greggs, Subway and Costa Coffee in the Leisure Service Category and Argos, Clarks and Peacocks in the comparison sector.

There is still a strong presence of independent retail and Wallington Farmers Market operates every Saturday at the Old Town Hall.

The Requirement List did not identify any retailers currently seeking a location in Wallington.

Pedestrian Flows:

The heat map below shows that the most concentrated areas of footfall are along the primary and secondary shopping frontages.

Figure 8.4: Footfall Heat Map



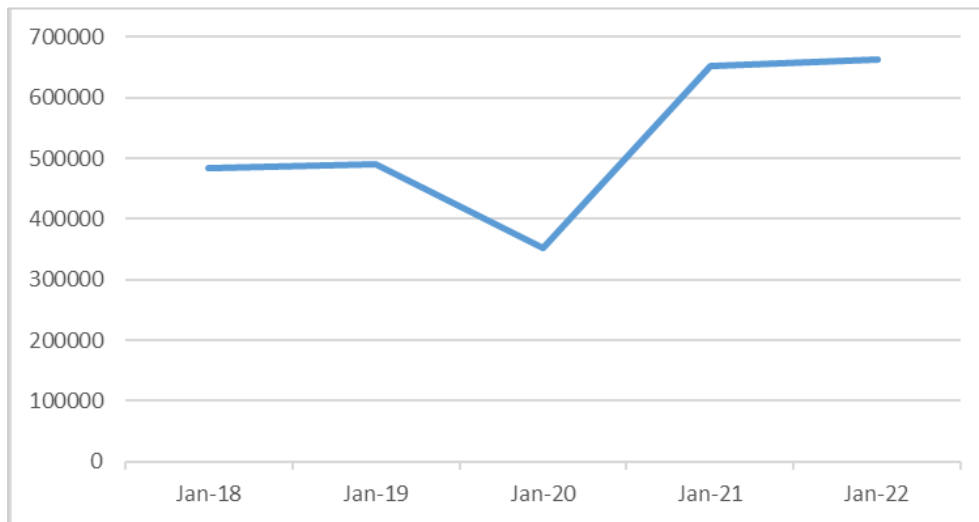
Source: Datscha

The most concentrated area of footfall is located just north of Wallington Square where there is a high mix

of retail offer including the anchor store, Sainsbury's, Wallington Square Tesco Express and Lidl. Ross Parade leading into Ross Road also have good levels of footfall. The more residential areas have a lot less footfall activity which is indicated as green on the heat map.

The figure below shows the footfall data for the highest concentration of the high Street for the month of September between 2018 and 2021 to show trends over the last 5 years. It shows how footfall dropped during 2020 but has since increased even past pre-pandemic levels. The YoY trend (September 2022) is +1.51%.

Figure 8.5: Wallington September Footfall (2018-2022)



Source: Datscha

Accessibility:

The District Centre Health Check (2022) informed the findings of this assessment. The two roads where the shopping frontages are located have heavy vehicular activity but there are safe crossing points provided throughout. All crossings have dropped kerbs and tactile paving to aid pedestrians but there is limited infrastructure provision for cyclists. As the road dips, the footpaths are raised above the road, which creates further separation increasing the feeling of safety.

Wallington railway station provides connections into London and the surrounding localities and is located in a convenient part of town. There are also a number bus services which link the town to other nearby towns via the 127, 151, 154, 157, 410, 455, 463 and S4 routes.

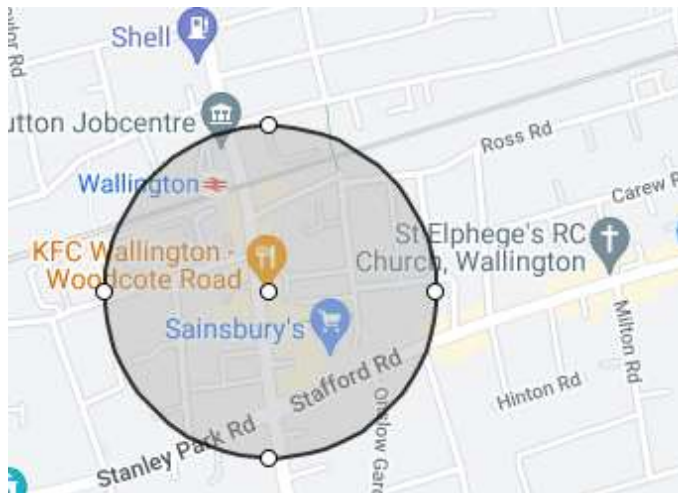
Wallington has a very good car parking provision with a number of car parks located throughout the centre including:

- The Public Hall Car Park – 47 spaces
- Sainsbury's Customers Only Parking – 395 spaces
- Wallington Library - 106 spaces
- Wallington Station - 80 spaces

Crime and Safety:

A postcode within the Wallington high street was chosen as a benchmark for crime within the centre and compared to the overall Sutton average. The radius of the area is 250m (shown below) and this is compared with the Sutton Borough average of the same radius. The data, obtained from CrimeRate, is aggregated from open police force data, social media signals and file FIO requests with local police departments.

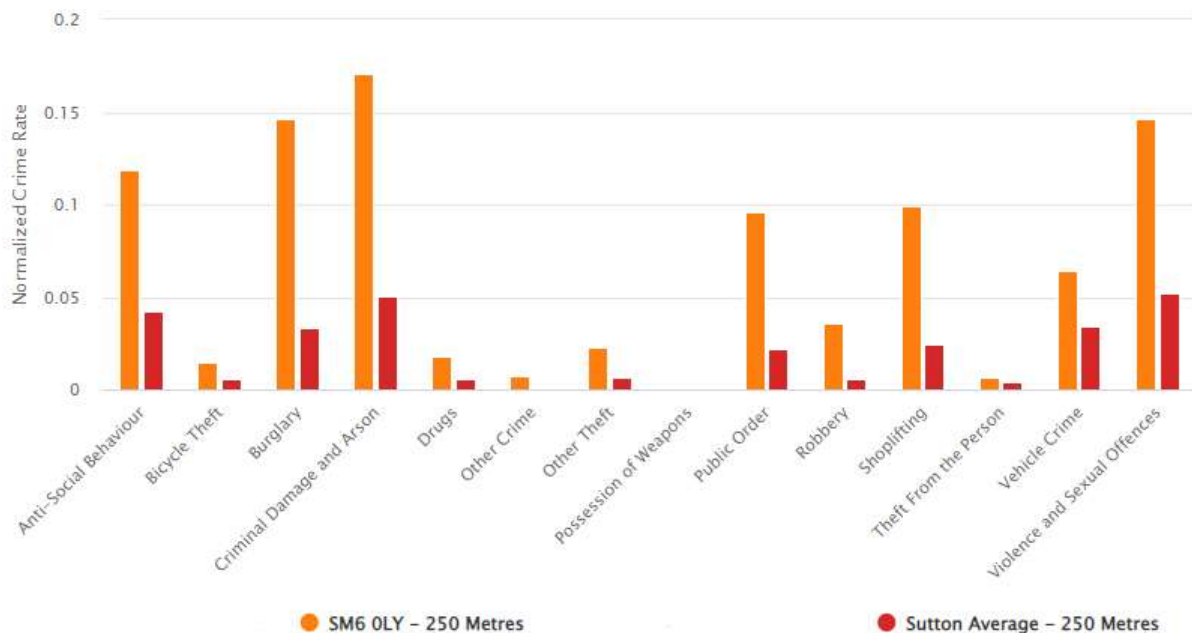
Figure 8.6: 250m Benchmark Radius



Source: mapdevelopers

The figure below shows that the most common crimes reported are Criminal Damage and Arson; Burglary and Violence and Sexual Offences. All types of crime are much higher within the centre which is to be expected given the urban nature and population density of the centre.

Figure 8.7: Crimes reported around SM6 0LY



Source: CrimeRate

Town Centre Environmental Quality:

The environmental quality has been summarised in the District Centre Health Checks (2022) which states that Wallington has a good general appearance with a mixture of architecture ranging from mid-19th century buildings to dated 80's design. This is referring to apartment buildings at Wallington Square which are out of character in the street scene.

There is some landscaping throughout which softens the centre's built form but there are some key vacant units which detract from the centre, notably on the corner of Ross Parade. The road through the centre is busy and congested but it does not feel unsafe for pedestrians.

Barriers to Business:

The same external economic pressures and commercial constraints (e.g. high business rates and upwards only rental systems) that were reported for Carshalton District Centre apply to Wallington in

respect to barriers to business.

Responses from stakeholders did not identify specific issues to barriers to business.

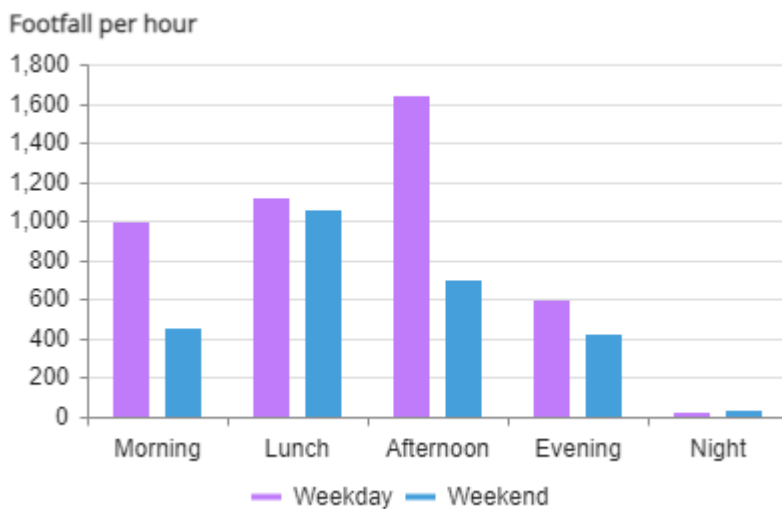
Evening and Night time Economy:

An evening and night time economy often refers to the transition from daytime uses into evening and late night uses, predominantly between 6pm and 6am.

The figure below shows that in comparison to other times of the day, Wallington has very little night time activity in relation to footfall and suggests that the centre does not have a strong evening or night time economy. This is likely due to main shopping area along Woodcote Road largely comprising convenience and comparison retail, cafes and banks, which means that the main commercial offer in the evening times is limited to foodstores, Sainsbury’s and Lidl for example. There are more restaurants and bars located further north near the railway, such as the Wetherspoons which remains open until midnight.

Morning and afternoon footfall levels are substantially higher during weekdays which indicates that those using the centre are commuting. Lunchtime appears to have the most consistent economy throughout the entire week.

Figure 8.8: Wallington Weekly Footfall Average



Source: Datscha

Conclusions:

Wallington District Centre has a good mix of retail and is very well connected with the railway station located within the centre itself. The town has several large national multiples such as Sainsbury’s, Iceland and Lidl. The town is attractive but has a few prominent vacancies, and the area around the arcade appears slightly dated and not in character to the overall environmental quality. Further, as the centre boundary extends east, it feels slightly disconnected from the main shopping areas.

Overall, the town is the largest District Centre in the Borough and is one of the more built up areas of the Borough and likely has a lot of development potential. There are also low vacancy rates which suggest that retailers want to be located here and supports that the town is considered to be vital and viable.

9.0 WORCESTER PARK DISTRICT CENTRE

Overview:

Worcester Park is located on the north-east corner of the borough boundary and comprises a linear high street on a hill called Central Road. The Primary Shopping Frontages also includes the Morrisons, which is located via Stone Place, off Central Road, as well as the northern part of Central Road which has key multiples such as Iceland, Costa and Boots. The Secondary Shopping Frontages are located further up the hill, along the south east end of Central Road.

The town is largely surrounded by terrace housing to the north, south and east; and a train track runs north-south to the west of the centre, and although linear is relatively compact and walkable.

Figure 9.1: Worcester Park District Centre Boundary



Source: London Borough of Sutton Local Plan Polices Map

Diversity of Uses:

Worcester Park has a total 145 outlets and 19,253 sqm of floorspace. Convenience retail has the lowest number of outlets with 16 although this represents 11% of the total number of commercial outlets and is marginally higher than the UK average. In relation to floorspace, convenience has the second highest quantum of floorspace which accounts for almost a quarter of the overall commercial floorspace (23%). This is well above the UK average which is around 16%.

Comparison retail has below average representation in terms of number of outlets, with a total of 30. Although having the third highest quantum of floorspace with 3,789 sqm this represents 20% of the total floorspace which is 10 percentage points lower than the UK average.

Retail and Leisure Services have the highest proportion of outlets with 43 and 34 respectively, and over 50% combined representation. Although the Leisure Service amount is on par with the UK average, the Retail Service representation is double that of the baseline figure (30% and 16% respectively). This also applies to the quantum of floorspace these categories occupy, with Retail Services occupying 3,231 sqm which accounts for 17%, well above the average. Leisure Services floorspace is on par with the UK average although in relation to other categories in Worcester Park, this represents the highest quantum of commercial floorspace in the centre with 5,471 sqm. Lastly, there are 17 Financial and Business Services outlets with a total of 1,882 sqm of floorspace, the lowest of the occupied commercial space in the town but higher than the UK average.

The centre only has five vacant outlets which equates to a vacancy rate of 3%. Vacant floorspace totals 386 sqm which is only 2% of the total commercial floorspace. The vacancy rate for outlets and floorspace is significantly below the UK average (14%), which suggests that Worcester Park is performing strongly in respect to operator demand for commercial space.

Table 9.1: Units and Floor space in Worcester Park District Centre

	No. of Outlets	No. of Outlets (%)	UK Average	No. of Floorspace	No. of Floorspace (%)	UK Average
Convenience	16	11%	9%	4494	23%	16%
Comparison	30	21%	27%	3789	20%	30%
Retail Service	43	30%	16%	3231	17%	7%
Leisure Service	34	23%	25%	5471	28%	26%
Financial & Business Service	17	12%	9%	1882	10%	7%
Vacant	5	3%	14%	386	2%	14%
Total	145	100%	100%	19253	100%	100%

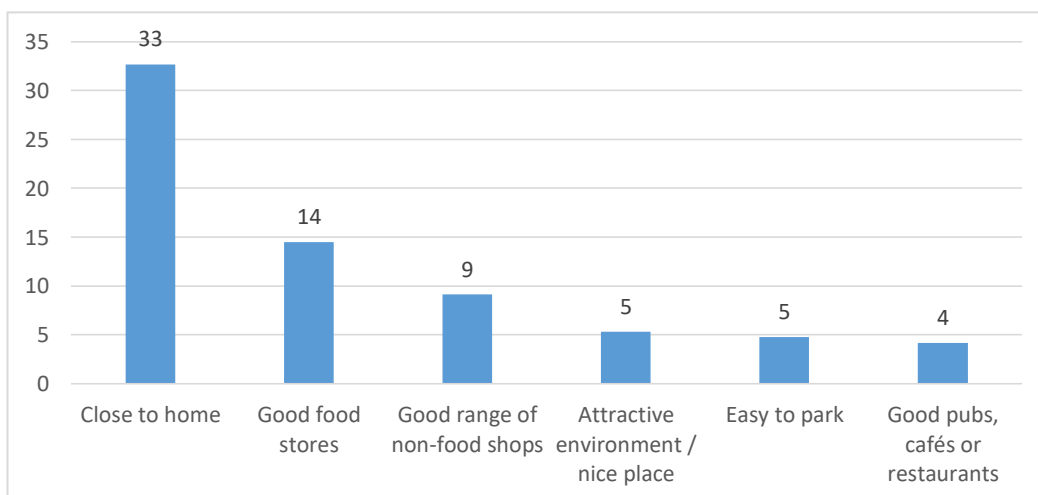
Source: LB Sutton Council Survey Data, 2022; Experian Goad

Customer Perceptions:

What do you like about Worcester Park?

The main response to why respondents like Worcester Park was the proximity the centre is to homes. Other common answers included the good of food and non-food stores. The following questions garnered very few quality responses the vast majority simply stating nothing or “don’t know”.

Figure 9.2: Key responses to what respondents like most about Worcester Park



Source: Q29 HTIS (Volume E)

Retail and Leisure Representation:

The key anchor store in Worcester Park is Waitrose, although there are several key national multiples such as Iceland, Superdrug, Costa, Nandos and KFC and Poundland. Similar to the rest of the district towns in the Borough of Sutton, the high street appears to have a very strong independent retailer presence.

The Retailer Requirement List identified Lidl as an operator seeking a location in Worcester Park. The retailer is seeking sites that can accommodate a store size of 1,672 sqm to 2,462 sqm and within a minimum site area of 0.32 hectares. Lidl will consider sites within mixed use developments where they are

located within the M25, which could be an opportunity for Worcester Park.

Pedestrian Flows:

Central Road has a consistent level of footfall along its entire stretch, with levels much lower visible on the more residential streets off the road. The footfall levels around the Morrisons are lower than Central Road which could indicate that the majority of customers travel by car to shop there.

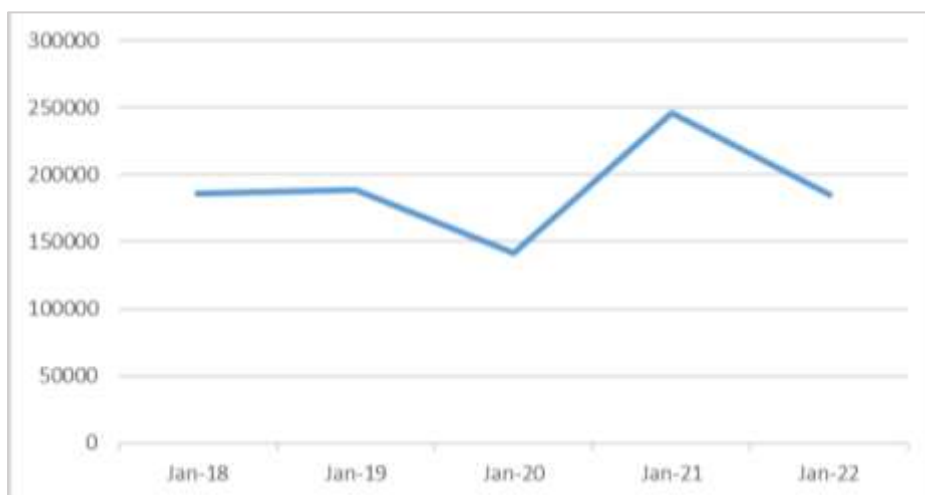
Figure 9.3: Footfall Heat Map



Source: Datscha

The figure below provides a visual representation of the busiest section of the Worcester Park in relation to footfall concentration and how footfall levels has been inconsistent, dropping between 2019 to 2020, increasing rapidly in parts between 2020-2021 and then decreasing slightly at present. The YoY trend (September 2022) is **-24.69%** from the year prior.

Figure 9.4: Worcester Park September Footfall (2018-2022)



Source: Datscha

Accessibility:

The centre is well served with public transport links, Worcester Park Station located just outside the centre boundary and bus stops all along Central Road. The pedestrian environment is pleasant, with wide paving in good condition, pedestrian crossings with tactile paving and dropped kerbs. There is street furniture throughout the centre and bicycle racks provided for cyclists.

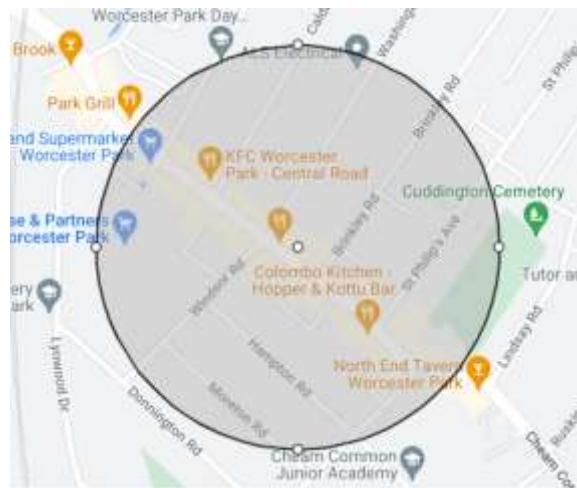
There are a number of bus services which operates from the Worcester Park linking to other location within and outside such as the 151, 213, S3, X26 and E16 routes.

The centre has two main car parks, one which is located at Stone Place by the Waitrose which offers free parking and 206 spaces and one at Worcester Park Station which has 78 spaces.

Crime and Safety:

A postcode within the main high street for Worcester Park was chosen as a benchmark for crime within the centre and compared to the overall Sutton average. The radius of the area is 250m (shown below) and this is compared with the Sutton Borough average of the same radius. The data, obtained from CrimeRate, is aggregated from open police force data, social media signals and file FIO requests with local police departments.

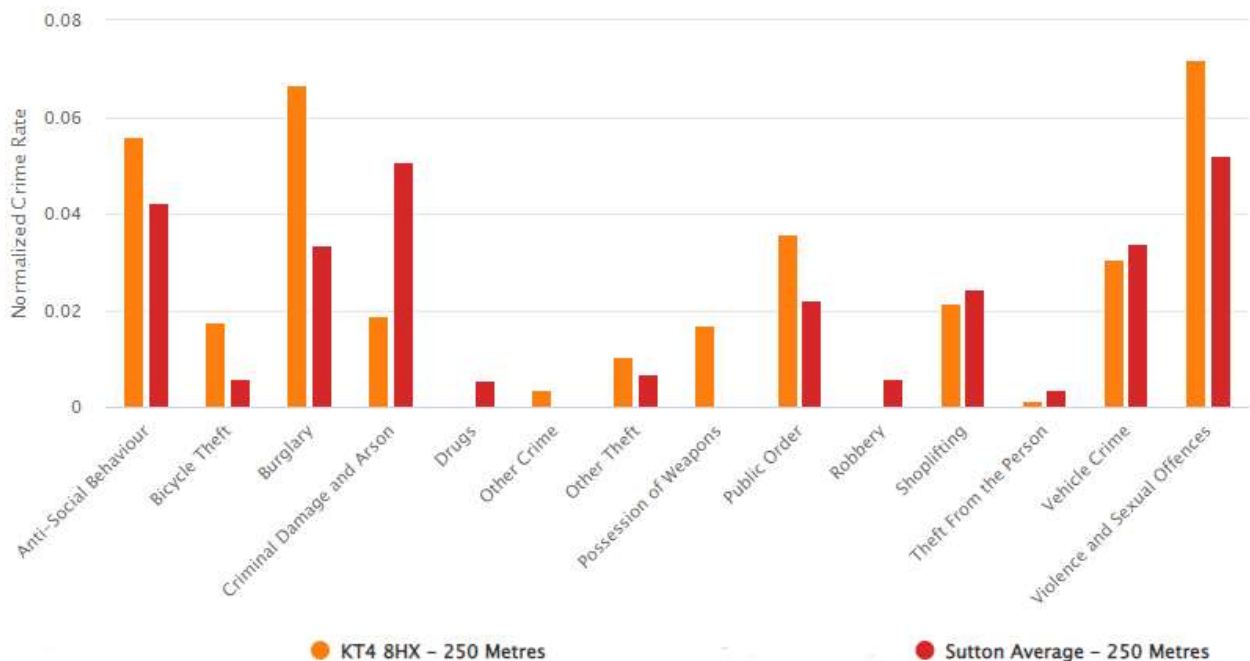
Figure 9.5: 250m Benchmark Radius



Source: mapdevelopers

The figure below shows that the most common reported crimes in Worcester Park are Violence and Sexual Offences, Burglary and Anti-Social Behaviour. Criminal Damage and Arson are much lower than the Sutton average, and shoplifting and vehicle crime are marginally lower.

Figure 9.6: Crimes Reported Around KT4 8HX Compared to Sutton Average



Source: CrimeRate

Town Centre Environmental Quality:

Worcester Park is also very attractive, with older buildings in a range of styles in good condition. There are flower beds and trees planted throughout which benefits the centre, softening the built environment.

Central Road is however very busy and has a lot of congestion, contributing to levels of air and noise pollution.

Barriers to Business:

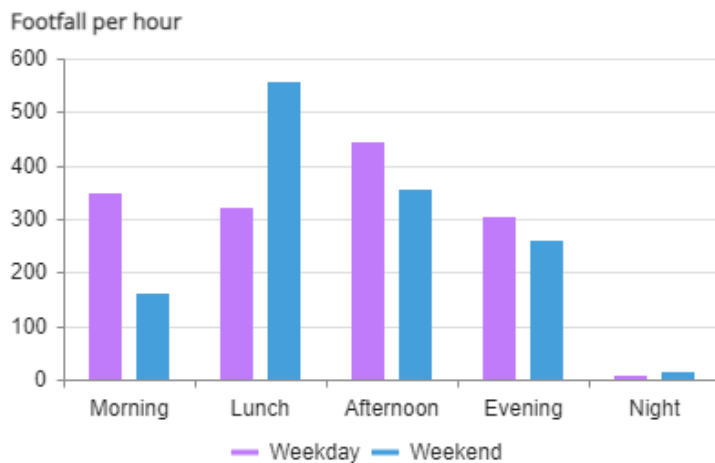
The same external economic pressures and commercial constraints (e.g. high business rates and upwards only rental systems) that were reported for Carshalton District Centre apply to Worcester Park in respect to barriers to business.

Responses from stakeholders did not identify specific issues to barriers to business..

Evening and Night time Economy:

The figure below demonstrates how Worcester Park has a consistent footfall level per hour between morning and evening, the only notable exception being weekend mornings. The peak footfall time appears to be weekend lunch times which is different than most of the other centres. Evening time is strong, seeing similar levels as weekday lunchtime and afternoon weekends. The graph indicates that there is not a strong night time economy with footfall levels being low at this timespan.

Figure 9.7: Worcester Park Weekly Footfall Average



Source: Datscha

Conclusions:

Worcester Park District Centre has a strong independent economy with low vacancies and consistent levels of footfall throughout the day. There are key anchor stores such as Morrisons which benefit the town by supporting footfall, although in comparison to the UK average there is an over provision of convenience retail and an under provision of comparison retail. The centre also notably has a lot of Leisure Service which is likely due to the amount of food and beverage retailers throughout the centre.

It has an attractive environment with urban greening and buildings in good condition. There is public furniture throughout and the soft landscaping, in terms of trees and flowers, benefits the centre experience.

However, the primary shopping frontage, although of good quality, is along a busy road with congestion which contributes to air and noise pollution. The centre also lacks a gathering area or focal point although this is likely due to the linear layout of the centre. Being so close to the train station means that the town is well connected to central London and other more areas outside the Borough. Overall, given the key retailers, strong independent market and low vacancies the town is considered to be vital and viable.