

CENTRE: KINGSTON DISTRICT CENTRE

DATE OF SITE VISIT: 04.04.2017

POSITION IN RETAIL HIERARCHY: DISTRICT CENTRE

SOURCES: CJ SITE VISIT/ GOOGLE MAPS

Table 1: Centre Rankings

Centre	2007/08	2009/10	2014/15	2016/17
Kingston	644	647	601	482
Bletchley	232	248	601	633
Westcroft	1626	1754	1406	1187
Wolverton	1540	1330	2306	2021

Sources: VENUESCORE - UK Shopping Venue Rankings

Notes: VENUESCORE is Javelin Group's annual ranking of the UK's retail venues (including town centres, standalone malls, retail warehouse parks and factory outlet centres). VENUESCORE evaluates each venue in terms of its provision of multiple retailers – including anchor stores, fashion operators, and non-fashion multiples. The sectors covered include foodservice, which in recent years has become increasingly integrated in helping to define and differentiate successful retail offers, as well as all comparison and convenience-based product sectors. The score attached to each operator is weighted to reflect its overall impact on shopping patterns. For example, anchor stores (e.g. John Lewis, Marks & Spencer, Selfridges) receive a higher score than unit stores. The resulting aggregate score for each venue is called its VENUESCORE. The resulting VENUESCORE rankings generally correlate closely with the actual market sizes of these shopping venues (in terms of consumer spending). However, there are some notable exceptions. For example, the mega-malls such as Trafford Centre, Bluewater and Meadowhall will tend to generate spending levels that are well in excess of their relative VENUESCORE. The same is true of several London venues, with Oxford Street and the two Westfield schemes the most notable outliers to this rule.

Table 2: Current Retail and Service Offer - Outlets

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	13	31.7%	31.6%	100
Convenience	3	7.3%	8.7%	84
Retail Service	8	19.5%	14.2%	138
Leisure Service	16	39.0%	23.6%	165
Financial & Business Service	1	2.4%	10.5%	23
Vacant	0	0.0%	11.2%	0
Other Retail	0	0.0%	0.1%	0
TOTAL:	41	100.0%	100%	511

Sources: CJ Site Visit (04/04/2017) / Google Maps

Notes: Whilst no recent Experian Goad Category system exists, the Experian Goad Indexing system is used in the above table. The Experian Goad indexing system shows the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count. For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125. The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

Table 3: Current Multiple Offer - Outlets

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	11	35%	43%	83
Convenience	2	6%	11%	57
Retail Service	4	13%	8%	159
Leisure Service	14	45%	22%	202
Financial & Business Service	0	0%	15%	0
TOTAL MULTIPLE OUTLETS & FLOORSPACE:	31	100%	100%	501

Source: CJ Site Visit (04/04/2017) / Google Maps

Notes: A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV are often sufficient in itself to attract consumers to a centre.

Table 4: Representation of Retailers, Leisure & Service Operators (Top 60)

DEPARTMENT/VARIETY STORES STORES:		CLOTHING & FOOTWEAR:	
Debenhams	0	Burton	0
House of Fraser	0	Dorothy Perkins	0
John Lewis	0	H&M	0
Marks & Spencer	X	New Look	0
Other	0	Next	X
MIXED GOODS RETAILERS:		Primark	0
Argos	0	River Island	0
Boots the Chemist	X	Top Man	0
TK Maxx	0	Top Shop	0
WH Smith	0	Clarks	X
Wilkinson	X	Zara	0
Other	0	Other	0
SUPERMARKETS:		OTHER RETAILERS:	
Tesco	X	Carphone Warehouse	X
Sainsbury's	0	Clintons	0
Morrisons	0	HMV	0
Waitrose	0	Sports Direct	0
Asda	0	JD Sports	0
M&S Simply Food	0	Superdrug	0
Aldi	0	Phones 4 U	0
Lidl	0	Vodafone	X
Co-Op	0	Other	0
Other	0	FOOD & BEVERAGE:	
BANKS & BUILDING SOCIETIES:		Pizza Hut	0
Lloyds	0	Zizzi	0
Barclays	0	Bill's	0
NatWest	0	McDonalds	X
HSB	0	Burger King	0
Halifax	0	Pizza Express	0
Nationwide	0	Prezzo	X
Other	0	Nando's	X
CINEMA OPERATORS:		Caffé Nero	X
Cineworld	0	Costa	X
Vue	0	Starbucks	X
Odeon	0	Wagamama	0
Curzon	0	Other	Giraffe, Frankie & Bennys, Subway
Empire	0	TOTAL:	
The Light	0	14	
Other	0		

Notes: The list of national retailer, leisure and service operators identified is based on the list of 30 'Major Retailers' set out by Experian Goad in the Category Reports. This list has been expanded by CJ to include other major retail, leisure and service operators that in our judgement are most likely to "anchor" a town centre's offer and improve the consumer appeal of a centre. The presence of multiple outlets and major retailers can have a significant impact on neighbouring outlets. While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

Notes: X = representation in centre and XX = more than one outlet in centre
 Sources: CJ Site Visit (04/04/2017) / Google Maps

Table 5: Food and Convenience Goods - Diversity of Offer

Category	Number of Outlets	% of Total Outlets in Centre	UK (%)	Index
SUB-TOTAL FOOD AND CONVENIENCE GOODS	3			
Bakers & Confectioners	1	2.4%	1.9%	130
Butchers	0	0.0%	0.7%	0
CTN	0	0.0%	0.6%	0
Convenience Stores	0	0.0%	1.6%	0
Fishmongers	0	0.0%	0.1%	0
Frozen Foods	0	0.0%	0.3%	0
Greengrocers	0	0.0%	0.3%	0
Grocers & Delis	0	0.0%	1.0%	0
Health Foods	1	2.4%	0.5%	530
Supermarkets	1	2.4%	0.8%	297
Other (1)	0	0.0%	1.0%	0
CENTRE TOTAL:	41	7.3%	8.7%	957

Notes: (1) 'Other' Category includes Markets, Health Foods, Off Licences, Shoe Repairs, etc.

Table 6: Comparison Goods Offer - Diversity of Offer

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
SUB-TOTAL COMPARISON GOODS OFFER	13			
Antique Shops	0	0.0%	0.4%	0
Art & Art Dealers	0	0.0%	0.6%	0
Booksellers	0	0.0%	0.5%	0
Carpets & Flooring	0	0.0%	0.5%	0
Catalogue Showrooms	0	0.0%	0.1%	0
Charity Shops	1	2.4%	2.7%	90
Chemist & Drugstores	1	2.4%	1.1%	216
Childrens' & Infants' Wear	1	2.4%	0.4%	581
Clothing General	0	0.0%	1.7%	0
Crafts, Gifts, China & Glass	0	0.0%	1.6%	0
Cycles & Accessories	0	0.0%	0.3%	0
Department & Variety Stores	1	2.4%	0.4%	642
DIY & Home Improvement	0	0.0%	0.7%	0
Electrical & Other Durable Goods	0	0.0%	1.3%	0
Florists	0	0.0%	0.7%	0
Footwear	1	2.4%	1.0%	239
Furniture Fitted	0	0.0%	0.4%	0
Furniture General	0	0.0%	0.9%	0
Gardens & Equipment	0	0.0%	0.1%	0
Greeting Cards	0	0.0%	0.7%	0
Hardware & Household Goods	2	4.9%	1.5%	332
Jewellery, Watches & Silver	0	0.0%	1.6%	0
Ladies & Menswear	1	2.4%	1.6%	155
Ladies Wear & Accessories	2	4.9%	2.2%	219
Leather & Travel Goods	0	0.0%	0.2%	0
Mens Wear & Accessories	0	0.0%	0.8%	0
Music & Musical Instruments	0	0.0%	0.1%	0
Music & Video Recordings	0	0.0%	0.2%	0
Newsagents & Stationers	0	0.0%	1.2%	0
Office Supplies	0	0.0%	0.0%	0
Other Comparison Goods	0	0.0%	0.8%	0
Photographic & Optical	0	0.0%	0.1%	0
Secondhand Goods, Books, etc.	0	0.0%	0.3%	0
Sports, Camping & Leisure Goods	0	0.0%	0.7%	0
Telephones & Accessories	2	4.9%	1.3%	370
Textiles & Soft Furnishings	0	0.0%	0.7%	0
Toiletries, Cosmetics & Beauty Products	0	0.0%	1.0%	0
Toys, Games & Hobbies	1	2.4%	0.8%	313
Vehicle & Motorcycle Sales	0	0.0%	0.3%	0
Vehicle Accessories	0	0.0%	0.2%	0
CENTRE TOTAL:	41	31.7%	31.4%	3155

Table 7: Clothing, Footwear & Fashion

Category	Number of Outlets	% of Total Outlets in Centre	UK (%)	Index
SUB-TOTAL CLOTHING, FOOTWEAR & FASHION	5			
Childrens' & Infants' Wear	1	2.4%	0.4%	581
Clothing General	0	0.0%	1.7%	0
Footwear	1	2.4%	1.0%	239
Jewellery, Watches & Silver	0	0.0%	1.6%	0
Ladies & Menswear	1	2.4%	1.6%	155
Ladies Wear & Accessories	2	4.9%	2.2%	219
Leather & Travel Goods	0	0.0%	0.2%	0
Mens Wear & Accessories	0	0.0%	0.8%	0
CENTRE TOTAL:	41	12.2%	9.5%	1194

Table 8: Household & 'Bulky' Goods

Category	Number of Outlets	% of Total Outlets in Centre	UK (%)	Index
SUB-TOTAL HOUSEHOLD & BULKY GOODS	0			
Carpets & Flooring	0	0.0%	0.5%	0
DIY & Home Improvement	0	0.0%	0.7%	0
Electrical & Other Durable Goods	0	0.0%	1.3%	0
Furniture Fitted	0	0.0%	0.4%	0
Textiles & Soft Furnishings	0	0.0%	0.7%	0
CENTRE TOTAL:	41	0.0%	3.6%	0

Table 9: Leisure Services

Category	Number of Outlets	% of Total Outlets in Centre	UK (%)	Index
SUB-TOTAL LEISURE SERVICES	16			
Bars & Wine Bars	0	0%	2%	0
Bingo & Amusements	0	0%	0%	0
Cafés	5	12%	4%	274
Casinos & Betting Offices	0	0%	1%	0
Cinemas, Theatres & Concert Halls	0	0%	0%	0
Clubs / Disco, Dance & Nightclubs	0	0%	1%	0
Fast Food & Take Away	3	7%	6%	128
Hotels & Guest Houses	0	0%	1%	0
Public Houses	0	0%	3%	0
Restaurants	6	15%	5%	320
Sports & Leisure Facilities	2	5%	1%	554
CENTRE TOTAL:	41	39%	24%	1276

Table 10: Class A3 - A5 Uses

Category	Number of Outlets	% of Total Outlets in Centre	UK (%)	Index
SUB-TOTAL CLASS A3-A5 USES	14			
Class A3: Restaurants & Cafés	11	26.8%	9.0%	297
Class A4: Drinking Establishments	0	0.0%	4.3%	0
Class A5: Hot Food Take-Away	3	7.3%	5.7%	128
CENTRE TOTAL:	41	34.1%	19.1%	425

Table 11: Retail Services

Category	Number of Outlets	% of Total Outlets in Centre	UK (%)	Index
SUB-TOTAL RETAIL SERVICES	8			
Dry Cleaners & Launderettes	1	2.4%	0.8%	325
Health & Beauty	3	7.3%	8.7%	84
Opticians	1	2.4%	1.3%	182
Post Offices	0	0.0%	0.5%	0
Travel Agents	2	4.9%	0.8%	610
Other	1	2.4%	2.1%	116
CENTRE TOTAL:	41	19.5%	14.2%	1318

Table 12: Financial & Business Services

Category	Number of Outlets	% of Total Outlets in Centre	UK (%)	Index
SUB-TOTAL FINANCIAL & BUSINESS SERVICES	1			
Building Societies	0	0.0%	0.4%	0
Financial Services	0	0.0%	1.3%	0
Property Services	1	2.4%	3.6%	68
Retail Banks	0	0.0%	2.5%	0
Other	0	0.0%	2.6%	0
CENTRE TOTAL:	41	2.4%	10.4%	68

Table 13: Prime Zone A Rents in Kingston and Similar Centres

Town	Prime Zone A Rents at 2016
Kingston	£30-60 psf
Milton Keynes	£230 psf
Westcroft	£19-42 psf
Wolverton	£11-16 psf
Bletchley	£16-28 psf
Olney	£33-44 psf
Stony Stratford	£23-35 psf
Woburn Sands	£23-28 psf
Newport Pagnell	£19-23 psf