



London Borough of Sutton Local Plan

# Sutton Town Centre Health Check 2018

November 2018





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# **1 Introduction**

- 1.1 The 2018 Sutton Town Centre Health Check provides an up-to-date picture of how Sutton Town Centre is performing and the council will take these findings into account in preparing any new strategy and policy documents.
- 1.2 Moreover, the Sutton Town Centre Health Check will contribute to the evidence base for the Sutton Local Plan, development proposals and local strategies in accordance with the National Planning Policy Framework (NPPF).
- 1.3 The information used in compiling this health check report comes from a comprehensive land-use survey carried out by council officers in summer 2018 as well as desk based research.
- 1.4 Town centres are accessible places for people to visit for shopping, leisure and work and, where appropriate, they are places where people live. The National Planning Policy Framework (NPPF) states that Local Authorities (LPAs) should ensure the vitality of town centres.



## 2 Background

### National and Regional Policy Context

#### 2.1 National Planning Policy Framework 2018 states:

*“The preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, and take into account relevant market signals.” (Paragraph 31)*

*“Planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. Planning policies should:*

- a) define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;*
- b) define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;*
- c) retain and enhance existing markets and, where appropriate, re-introduce or create new ones;*
- d) allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;*
- e) where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and*
- f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.” (Paragraph 85)*

#### 2.2 The Mayor of London, in connection with London Plan, Policy 2.15 Town Centres, states:

*“The current role of town centres should be tested through regular town centre ‘health checks’. This process should ensure that the network is sufficiently flexible to accommodate change in the role of centres and their relationships to one another. Centres can be reclassified and, where appropriate, new centres designated, in the light of these through subsequent reviews or alterations to this plan and DPDs. Changes to the upper tiers in the network (Major and above) should be co-ordinated first through this Plan.” (Paragraph 2.74)*

#### 2.3 In connection with London Plan, Policy 4.7 Retail and Town Centre Development, the Mayor states:

*“A) The Mayor supports a strong, partnership approach to assessing need and bringing forward capacity for retail, commercial, culture and leisure development in town centres (see policy 2.15)*

*“B) In taking planning decisions on proposed town centre development...the scale of retail, commercial, culture and leisure development, should be related to the size, role and function of a town centre and its catchment. Retail, commercial, culture and leisure development should be focused on sites within town centres, or if no in-centre sites are available, on sites on the edges of centres, or can be, well integrated with the existing centre and public transport. New proposals must be subject to an assessment of impact.”*

*“C) In preparing LDFs, boroughs should: identify future levels of retail and other commercial floorspace need in light of integrated strategic and local assessments. Undertake regular town centre health checks to inform strategic and local policy and implementation...”*

*“To meet identified needs and to support the vitality and viability of town centres, the Mayor supports a proactive approach to managing growth within and on the edges of town centres, and encourages joint work between public and private sectors to identify and bring forward new retail, leisure and commercial development opportunities. Boroughs are encouraged to consider the use of compulsory purchase powers to facilitate land assembly for town centre development where appropriate.” (Paragraph 4.43)*

### **Local Policy Context**

- 2.4 The council's current policy towards maintaining and enhancing the role of Sutton Town Centre and the district centres in the shopping hierarchy and sustaining their vitality and viability is set out in the Sutton Local Plan, adopted February 2018.
- 2.5 The Sutton Local Plan seeks to enhance and promote the role of the town centres especially proposals for shopping, office, housing, and accessible community and leisure facilities.
- 2.6 The Sutton Local Plan includes a number of policies relating to Sutton Town Centre Health Check, namely:
  - **Policy 3: Sutton Town Centre**, which sets out the council's (a) housing target; (b) retail floorspace delivery; (c) office floorspace delivery; (d) character, design and taller buildings potential; (e) principal public realm improvements; (f) infrastructure; and (g) delivery of the new development in the Sutton Town Centre.
  - **Policy 16: Office Development**, which states  
*“The council will support the development of office buildings providing company headquarters and small complexes of self-contained offices with a level of parking, commensurate with the parking standards, in suitable locations.*  
  
*The council will not grant planning permission for proposals involving the loss of existing B1 (a) office accommodation unless it meets specific marketing or development requirements.”*
  - **Policy 18: Shopping Frontages / Town Centre Uses**, which sets out the council's approach to Sutton Town Centre development and to primary and secondary shopping frontages. Policy 18 states:

### ***“Town Centre Development***

*Within Sutton Town Centre, District Centres and Local Centres, the council will grant planning permission for new development that:*

- (i) is suitable to the scale, role, function and the character of the centre and its catchment.*
- (ii) makes the optimum use of the site providing a town centre use or mix of town centre uses suitable to the scale of the development and its location within the centre.*
- (iii) provides active frontages at ground floor level and is compatible with council's requirements on shopping frontages.*

### ***Shopping Frontages***

*Within the Primary Shopping Frontages of Sutton Town Centre and the shopping malls of Sutton Town Centre, the council will expect the proportion of A1 (retail) ground floor units not to fall below 75% and that there should not be more than three adjoining non-A1 uses within the Primary Shopping Frontage.*

*Within the Secondary Shopping Frontages of Sutton Town Centre and district centres, the council will consider other town centres uses (for definition see glossary and box above) as suitable uses provided that the proposed development does not result in more than three adjoining non-A1 uses.*

### ***Intrusive Town Centre Uses***

*Within Shopping Frontages and Local Centres the council will grant planning permission for A5 (Hot Food Takeaway) uses, provided that:*

- (i) the total units in a centre in an A5 use is not already over 20% or the proposal does not take the percentage of total units in a centre on an A5 use above 20%, or:*
- (ii) the number of A5 (Hot Food Takeaway) uses in a frontage (defined as the frontage units between two side roads) does not exceed two.*

*Within Shopping Frontages and Local Centres the council will not grant planning permission for conversions or change of use which result in C2/C3/C4 (residential) ground floor uses, where permission is required, unless the unit is vacant and it has been demonstrated that it has been marketed at a reasonable market rent through a recognised agent for 12 months.”*

### **3 Town Centre Overview**

#### **History**

- 3.1 Until the middle of the 18<sup>th</sup> Century, the London Borough of Sutton was one of a string of villages and hamlets along the 'spring line' where the chalk dips below a narrow belt of Thanet Sand before the start of the impervious London clay upon which London sits. Sutton village centre was to the north for the current centre at Sutton Green.
- 3.2 The catalysts of growth were transport generated. The first impetus was the turnpiking of the London to Brighton Road, which went through Sutton from 1755 until 1809, after which the route moved east to go through Croydon. In the 1840s, around 20 coaches a day changed horses at The Cock Hotel on the present High Street. An east-west turnpike was laid out at the same time, which ran from Epsom to Croydon. It produced a major crossroads from which the development arose.
- 3.3 The arrival of the railway in 1847 promoted significant growth, especially when Sutton became a junction station in 1865. The census population figures illustrate the enormous growth rising from 1,204 in 1841, 13,977 in 1891 to 21,270 in 1911.
- 3.4 Sutton in the 1890s was at the height of its Victorian prosperity. It was surrounded by sought-after suburbs, which were growing significantly. In 1894, it became an independent Urban District Council. In 1900, Municipal Offices were built at the junction of Throwley Road with the High Street. Subsequently, a modern post office was built on Grove Road in 1907 and a police station was built in Carshalton Road in 1909. In 1906 trams arrived at the north end of the town, later to be replaced by trolley buses.
- 3.5 In the 1960s and 1970s, much of the High Street was progressively pedestrianised and the roads to its east and west, Throwley Way and St Nicholas Way, were created to form a gyratory. While it created a pedestrian centre and provided significant city centre development opportunities, much of the Victorian character was lost. This included the Municipal Offices, the swimming baths, the Congregational Church, the Granada cinema, the Cock Hotel and the Greyhound Hotel. Simultaneously, in the suburbs, block of flats began to replace Victorian and Edwardian properties.

#### **Location and Connections**

- 3.6 The London Borough of Sutton lies on the southern edge of the capital, adjoining the boroughs of Croydon, Merton and Kingston and the county of Surrey. Sutton Town Centre is one of four Metropolitan Centres in south London. It is located about 16 kilometres (ten miles) south of central London and eight kilometres (five miles) west of Croydon.
- 3.7 Sutton Town Centre is well-connected to London and Surrey. It offers rail services to London Victoria (the fastest journey time is 30 minutes), London Blackfriars and London Bridge as well as to Croydon, Epsom and Wimbledon. It is also served by 13 bus routes, providing comprehensive links to all parts of the borough and beyond. Consequently, it enjoys a Public Transport Accessibility Level (PTAL) rating of 5 rising to 6a (6b being the highest or most accessible). A possible extension of the Tramlink network, which will connect the town centre to Morden and beyond via Rosehill, would further increase its overall accessibility.
- 3.8 Road links into the town centre provide convenient access to/from central London (with links from the A217 and the A24) and to/from Junction 8 of the M25 (via the A217). The east-west A232 strategic orbital road crosses the southern part of the town centre.

Its roads also form part of the London Cycle Network and steps are being taken to encourage cycling and walking by improving the public realm. The town centre is well served by shoppers' car parks, with 1,749 spaces available in two public car parks and a further 2,513 spaces available to customers of the large town centre stores. There are also 197 spaces at the railway station car park. Table 3.1 shows the Sutton Town Centre car parks.

*Table 3.1: Sutton Town Centre Car Parks*

<b>Car Park Name</b>	<b>Postcode</b>	<b>Ownership</b>	<b>Maximum Parking Capacity</b>	<b>Operating Hours*</b>
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
<b>Total</b>			<b>4,459</b>	

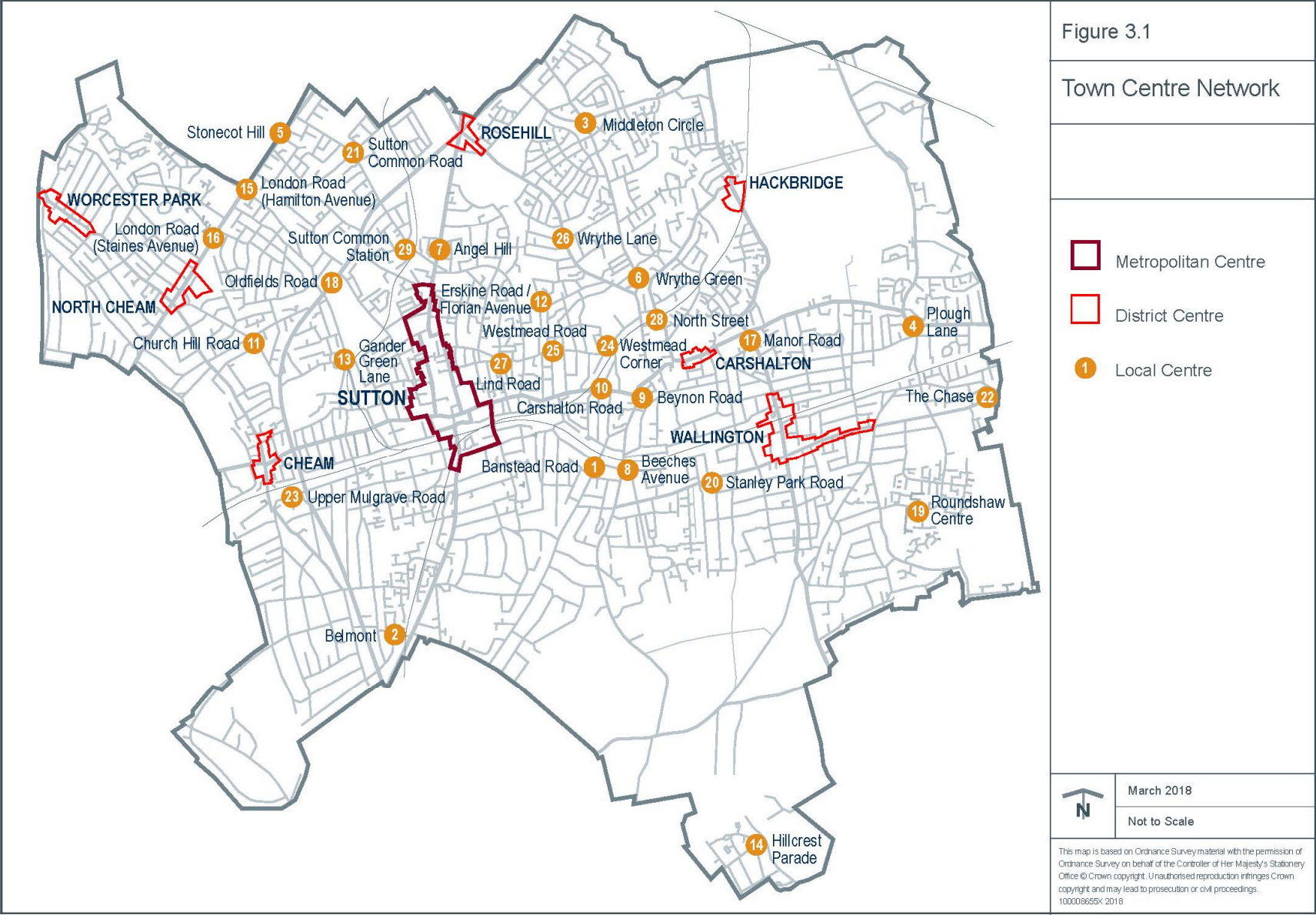
*\*Table 3.1 does not include Sunday operating hours.*

### **Character**

- 3.9 The town centre is characterised by its strong linear form and pronounced slope from south to north. The commercial core stretches for about a mile, between Sutton Green in the north and the Subsea7 offices in the south. The pedestrianised High Street is the main public space, linking a number of other paved and green spaces within the town centre and on its edges.
- 3.10 East-west connections across the town centre and into the surrounding area are not always welcoming and legible, lacking clear routes and landmarks. The traffic-dominated gyratory road system, parallel to the pedestrianised High Street on both sides, provides a barrier to east-west movements.
- 3.11 Sutton is the main retail and leisure destination in the borough and performs the function of a metropolitan centre. Figure 3.1 shows its location in the borough.



Figure 3.1: Sutton Town Centre Location

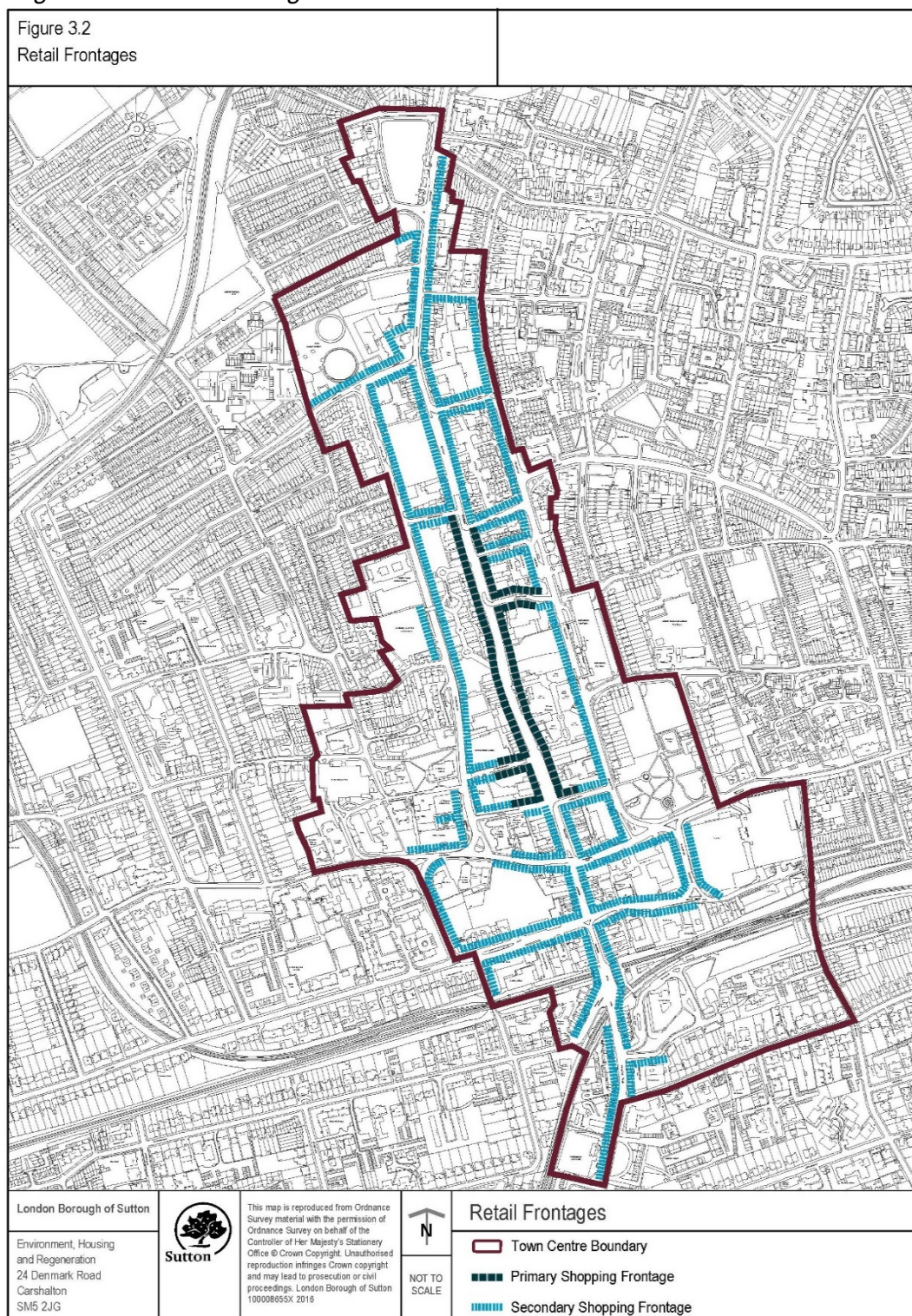




## Land use

- 3.12 The land-use survey collected information on all the properties within the survey area. This included data on the use classes, floor areas and number of storeys. It also recorded information on vacant premises.
- 3.13 In line with the Sutton Local Plan, Figure 3.2 shows the survey area. This includes town centre boundary and primary and secondary shopping frontages.

*Figure 3.2: Retail Frontages*



## **4 Town Centre Health Check Methodology**

- 4.1 Council officers conducted a land survey for Sutton Town Centre in summer 2018. The survey covered four areas and two multi-storey shopping malls.
- 4.2 The four areas are a) the northern part of Sutton Town Centre between Sutton Green and Greenford Road/Benhill Avenue, b) the primary shopping frontages between Greenford Road/Benhill Avenue and Hill Road/Throwley Road, c) the secondary shopping frontages between Greenford Road/Benhill Avenue and Hill Road/Throwley Road and d) the southern part of the Sutton Town Centre between Hill Road/Throwley Road and Subsea7. The two shopping malls are St Nicholas Centre and Times Square Shopping Centre.
- 4.3 The survey itself involved using data collected from the 2013 Health Check as a baseline and identifying the changes had occurred subsequently. The survey identified a set of practical indicators of town centre vitality and viability, ensuring that they are useful and relevant for statutory planning functions and the formulation and implementation of town centre management strategies. These indicators are:
  - Units in the town centre;
  - Town centre floorspace;
  - Occupied vs vacant units;
  - Change in units; and
  - A1 Goad sub class analysis.
- 4.4 Each of these indicators are analysed for each shopping frontage only for the ground floor land uses. In the case of the two shopping centres the indicators will take into account all floors. These indicators will also be analysed for the whole of the town centre. In addition, a general commentary is given alongside the data.
- 4.5 All plans show the previous use class of the vacant sites (V) and the future use of the sites that are under construction (UC). The Use Classes Order can be found in Appendix B.

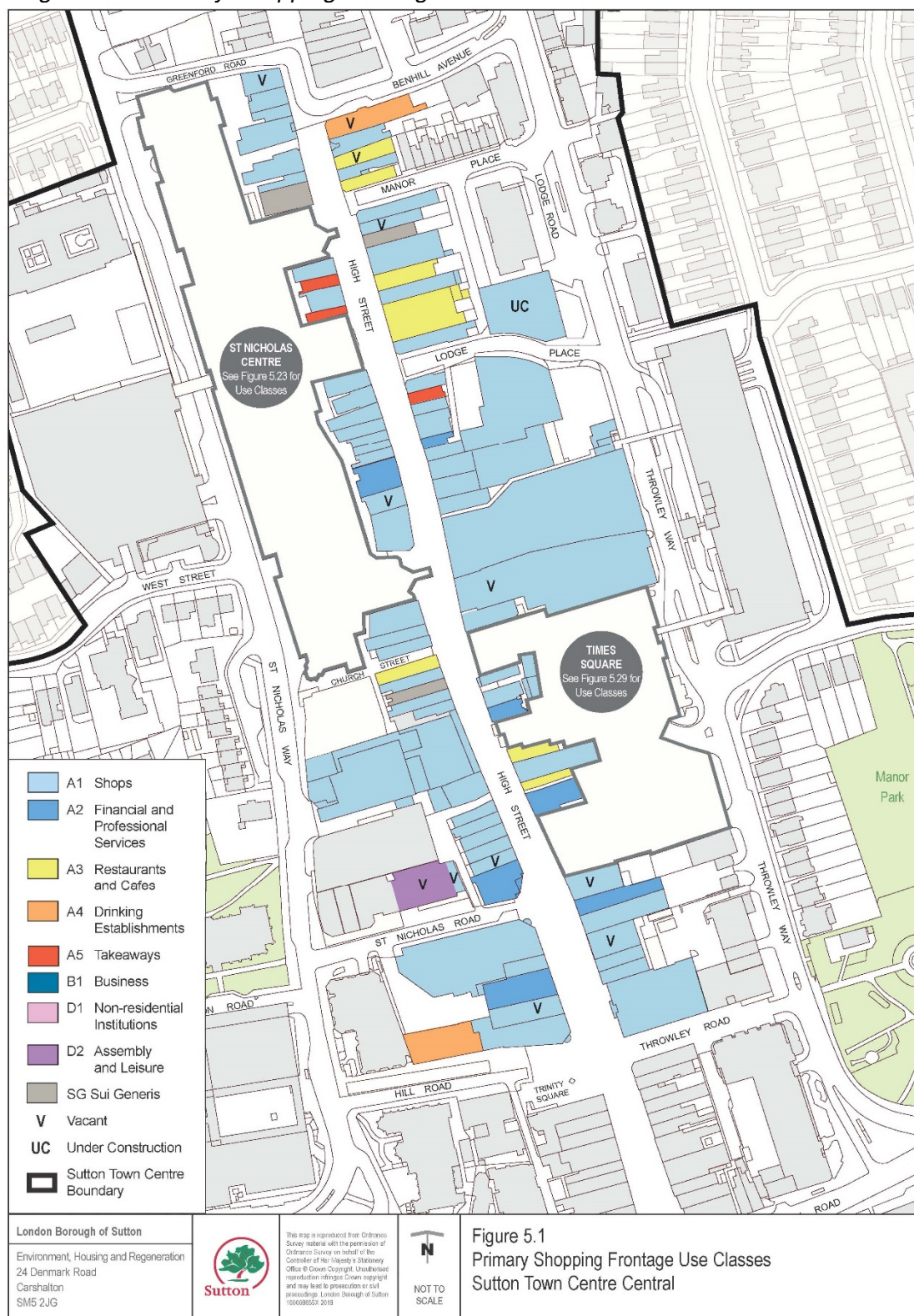


## 5 Sutton Town Centre Health Check Results

### A. Primary Shopping Frontage

- 5.1 The first survey area is the primary shopping frontage excluding the two shopping centres. The survey area is displayed in the Figure 5.1 below.

Figure 5.1: Primary Shopping Frontage



- 5.2 Table 5.1 shows the total number of units and the total amount of floorspace by use class in the primary shopping frontage.

*Table 5.1: Total Units and Floorspace (including vacancies)*

Use Class	Total Units	%	Total Floorspace	%
A1	67	75%	44,132	82%
A2	6	7%	2,330	4%
A3	7	8%	2,894	5%
A4	1	1%	1,142	2%
A5	3	3%	776	1%
B1	0	0%	0	0%
D1	0	0%	0	0%
D2	1	1%	1,371	3%
SG	4	4%	1,110	2%
<b>Total</b>	<b>89</b>	<b>100%</b>	<b>53,755</b>	<b>100%</b>

- 5.3 The total units in the primary shopping frontage are 89 and the total amount of floorspace is 53,755m<sup>2</sup>. A1 use class dominates the area with 67 units and 44,132m<sup>2</sup> of floorspace.
- 5.4 Figure 5.2 shows the occupied and vacant units and Figure 5.3 the occupied and vacant floorspace.

*Figure 5.2: Occupied and Vacant Units in Primary Shopping Frontage (excluding shopping centres)*

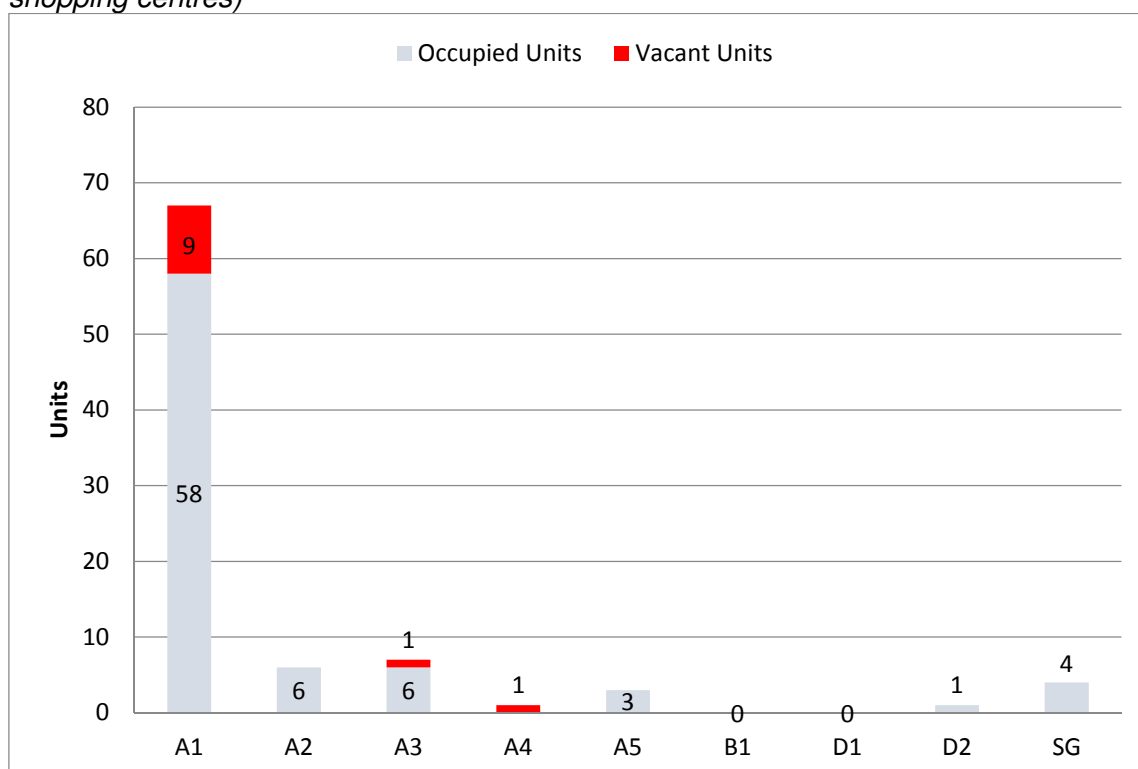
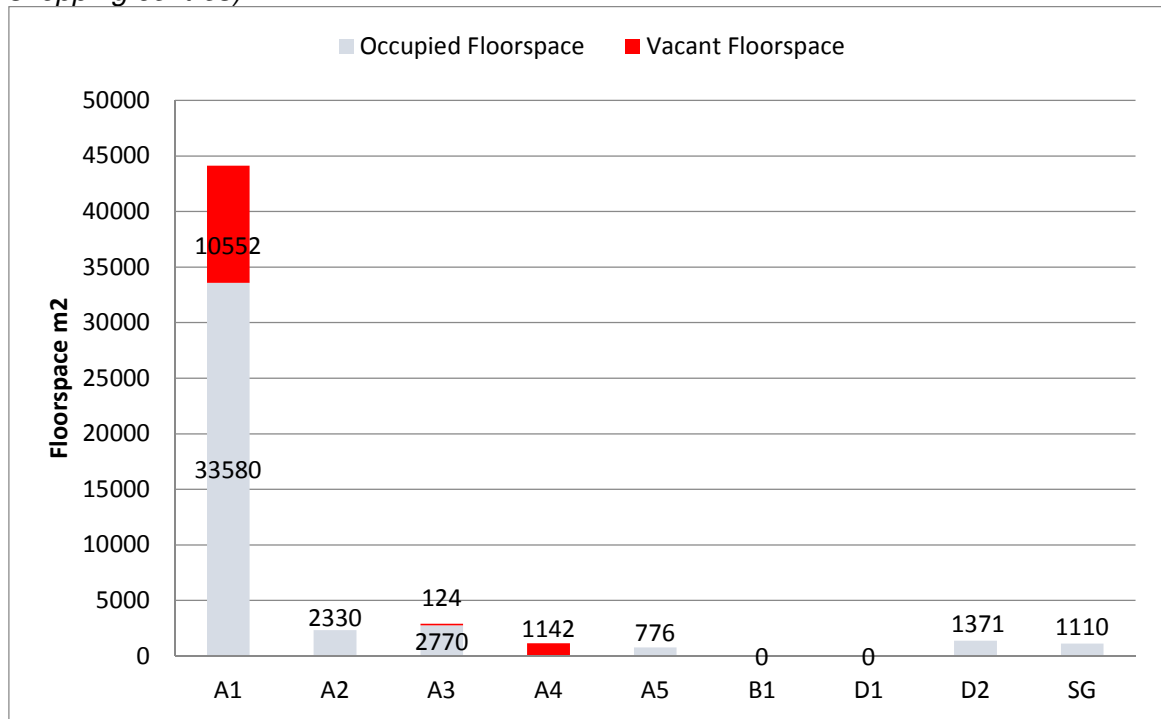




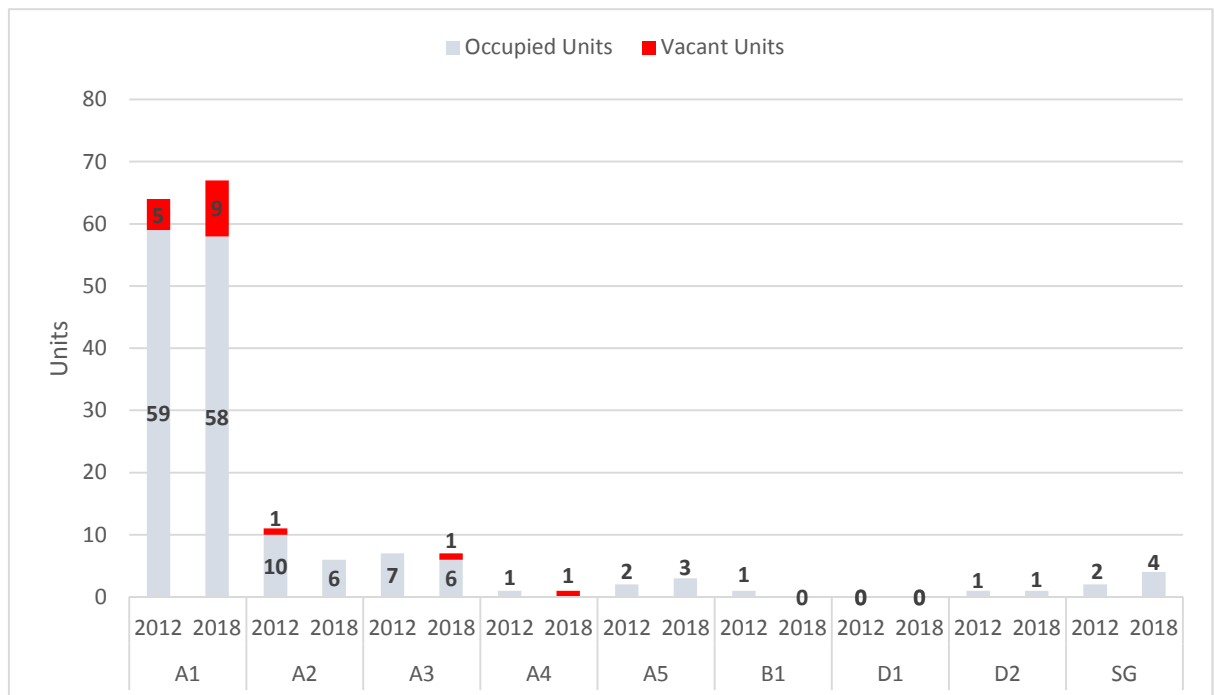
Figure 5.3: Occupied and Vacant Floorspace in Primary Shopping Frontage (excluding shopping centres)



5.5 There are 11 vacant units, which is 12% of the total units. Nine of them are vacant A1 units (10%). The vacant floorspace is 11,818m<sup>2</sup>, which accounts for 22% of the total floorspace. There are 10,552m<sup>2</sup> of vacant A1 floorspace giving a vacancy rate of 20%. The remaining use classes have lower or no vacant floorspace vacant floorspace.

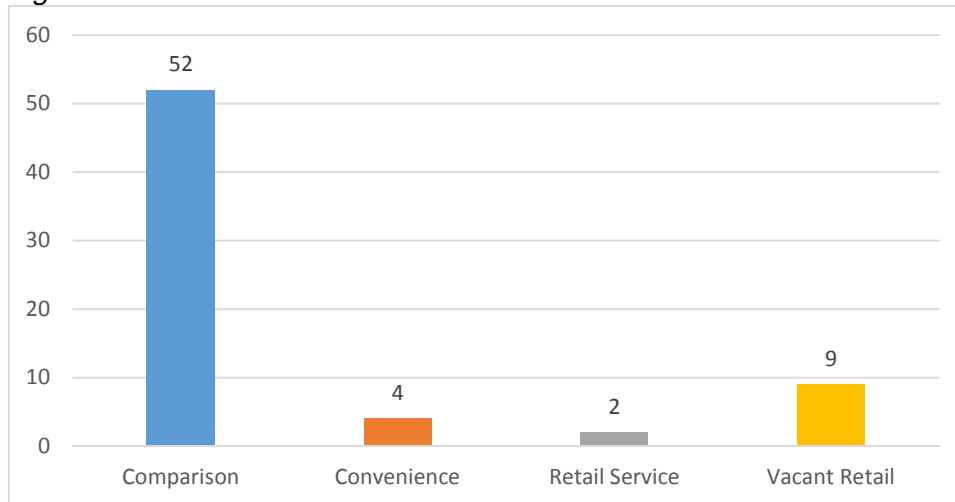
5.6 Figure 5.4 shows the change to the number of units since the last health check in 2012.

Figure 5.4: Unit Change from 2012 to 2018



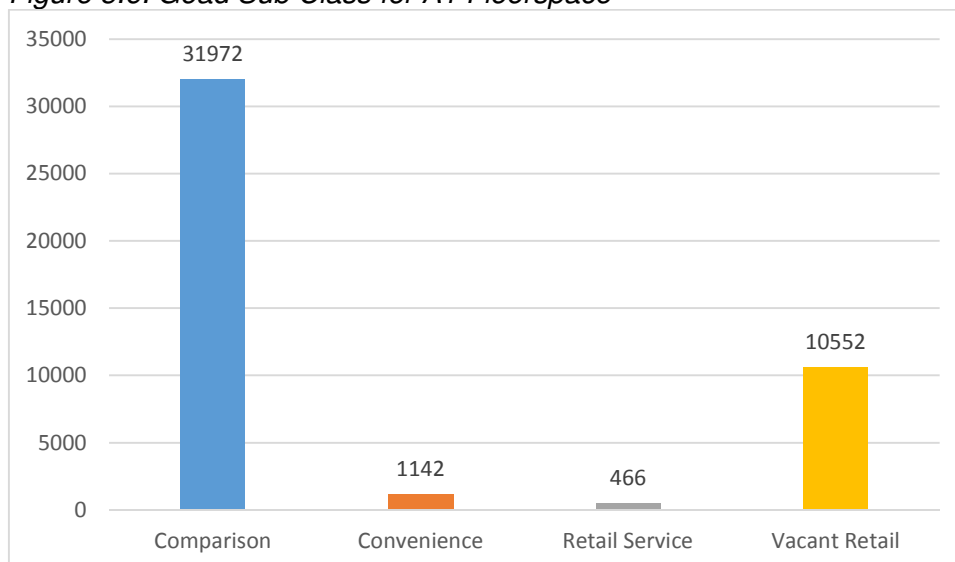
- 5.7 Although the total A1 units have increased from 64 to 67, the occupied units have dropped from 59 to 58. Also, there has been a decline in A2 occupied units from ten to six. This is due in part to a reclassification of beauty salons, betting shops and pay day loan shops from A2 to SG. The remaining use classes have not changed remarkably.
- 5.8 The primary shopping frontage is dominated by A1 comparison units with 52 out of 68. Figure 5.5 shows the Goad Sub Class breakdown for the A1 units.

*Figure 5.5: Goad Sub Class for A1 Units*



- 5.9 The comparison floorspace is 72% of the total whereas the vacant retail floorspace is 24%. Figure 5.6 shows the Goad Sub Class breakdown for the A1 floorspace.

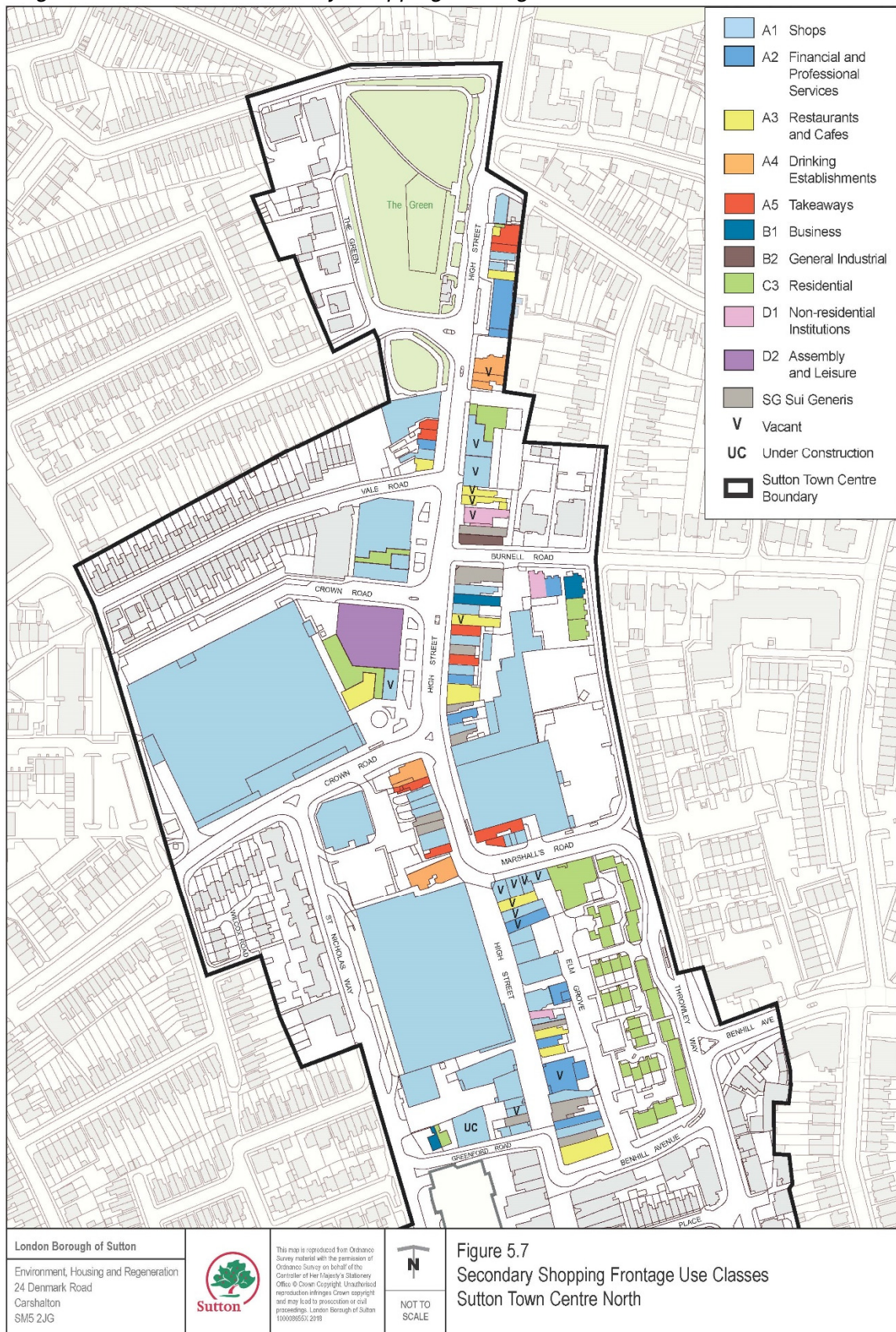
*Figure 5.6: Goad Sub Class for A1 Floorspace*



## B. Northern Secondary Shopping Frontage

5.10 The northern secondary shopping frontage is displayed in the Figure 5.7 below.

Figure 5.7: Northern Secondary Shopping Frontage



5.11 Table 5.2 shows the total number of units and the total amount of floorspace by use class in the northern secondary shopping frontage.

*Table 5.2: Total Units and Floorspace (including vacancies)*

Use Class	Total Units	%	Total Floorspace	%
A1	39	40%	20,810	63%
A2	11	11%	2,666	8%
A3	14	14%	1,443	4%
A4	3	3%	1,276	4%
A5	10	10%	758	2%
B1	3	3%	880	3%
B2	1	1%	437	1%
D1	3	3%	361	1%
D2	1	1%	1,108	3%
SG	13	13%	3,521	11%
<b>Total</b>	<b>98</b>	<b>100%</b>	<b>33,260</b>	<b>100%</b>

5.12 The total units in the northern secondary shopping frontage are 98 and the total amount of floorspace is 33,260m<sup>2</sup>. The majority of units and floorspace is A1 use class with 39 units and 20,810m<sup>2</sup> of floorspace.

5.13 Figure 5.8 shows the occupied and vacant units and Figure 5.9 the occupied and vacant floorspace.

*Figure 5.8: Occupied and Vacant Units in Northern Secondary Shopping Frontage*

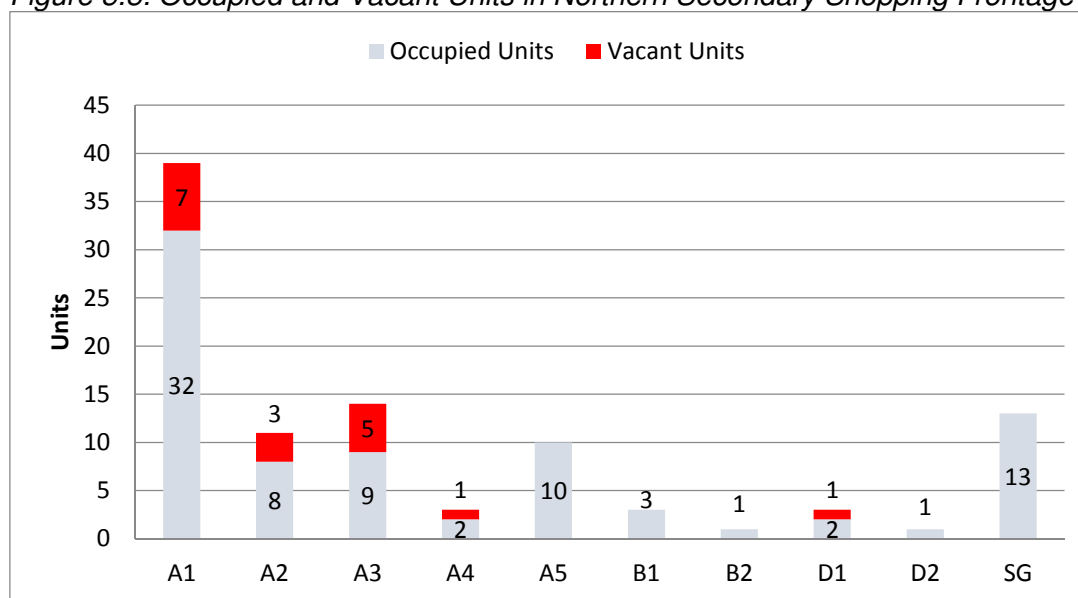
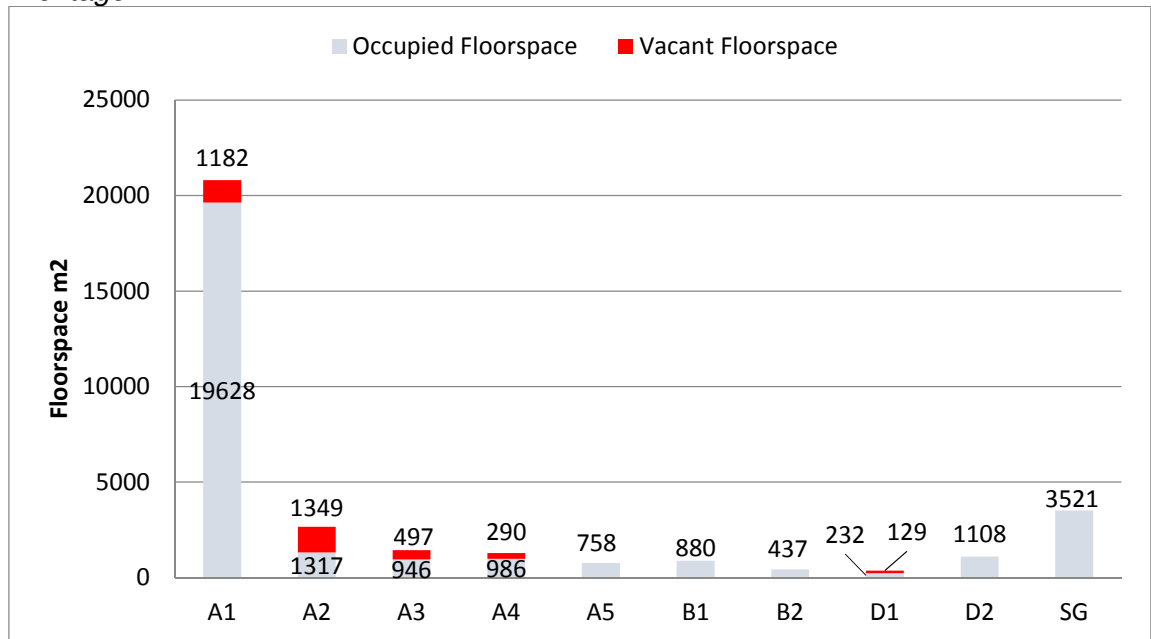


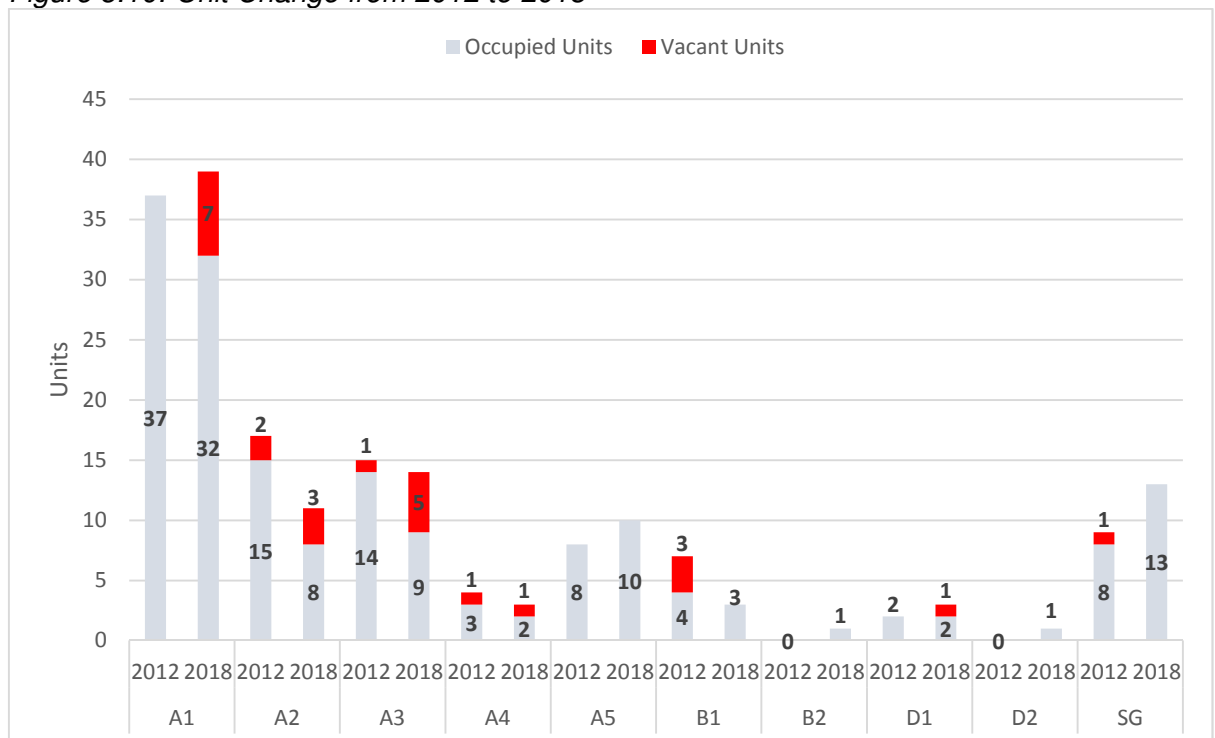
Figure 5.9: Occupied and Vacant Floorspace in Northern Secondary Shopping Frontage



5.14 There are 17 vacant units, which is 17% of the total units. Eight of them are vacant A1 units (7%). The vacant floorspace is 3,447m<sup>2</sup>, which accounts for 10% of the total floorspace. In terms of floorspace, both A1 and A2 use classes have a vacancy rate of 4%. The remaining use classes have lower or no vacant floorspace.

5.15 Figure 5.10 shows the change to the number of units since the last health check in 2012.

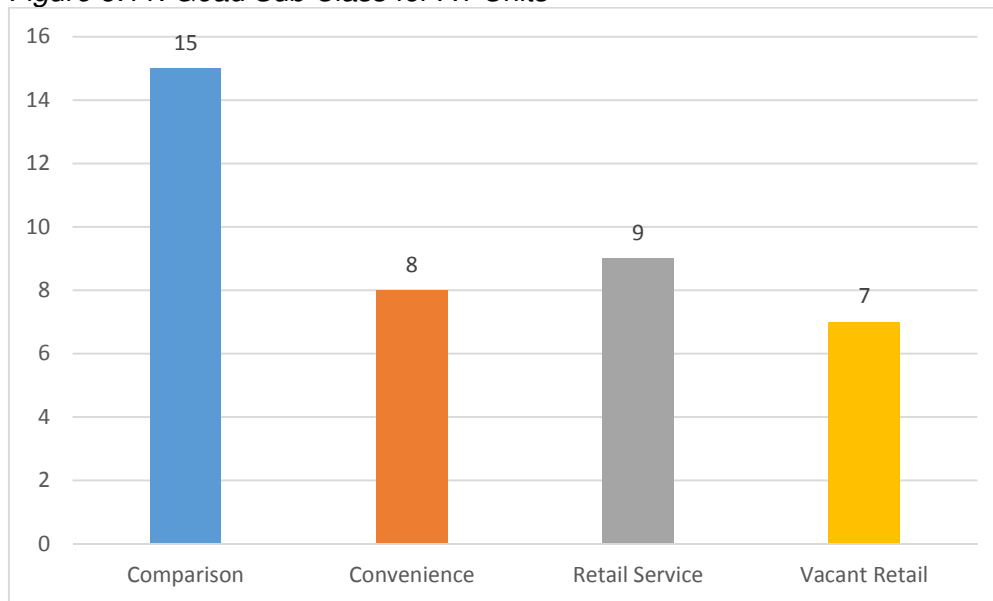
Figure 5.10: Unit Change from 2012 to 2018





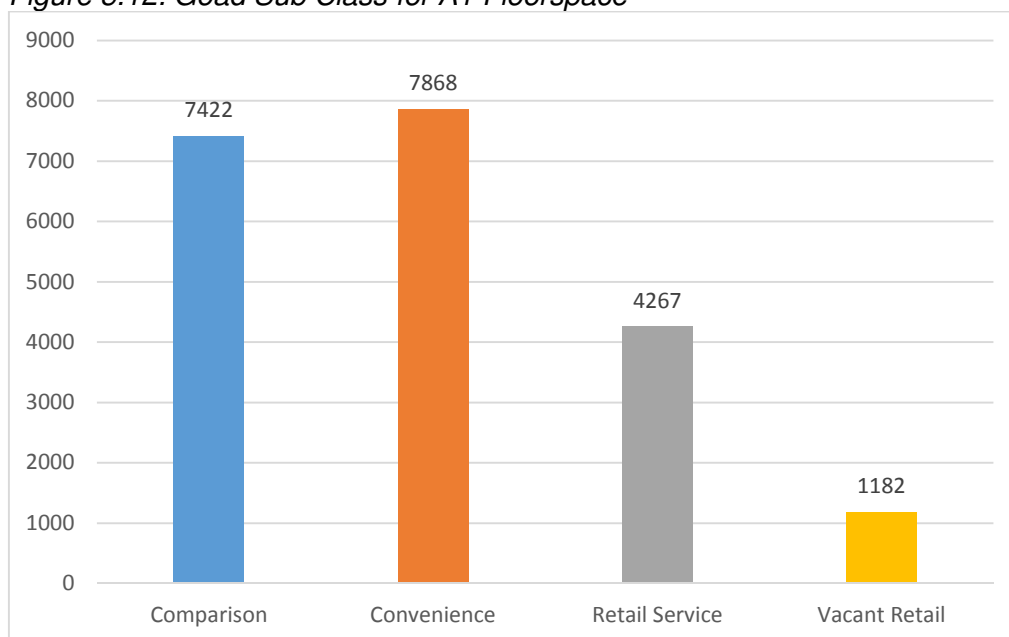
- 5.16 Although the total A1 units have increased from 37 to 39, the occupied units have dropped from 37 to 32. Also, there has been a decline in A2 occupied units from 15 to eight and in A3 occupied units from 14 to nine. In contrast, Sui Generis occupied units have increased from eight to 13.
- 5.17 Comparison units constitute the highest number of A1 units with 15 out of 39. Figure 5.11 shows the Goad Sub Class breakdown for the A1 units.

*Figure 5.11: Goad Sub Class for A1 Units*



- 5.18 The comparison floorspace is 36%, slightly lower than the convenience floorspace which accounts for 38% of the total. The vacant retail floorspace is 6%. Figure 5.12 shows the Goad Sub Class breakdown for the A1 floorspace.

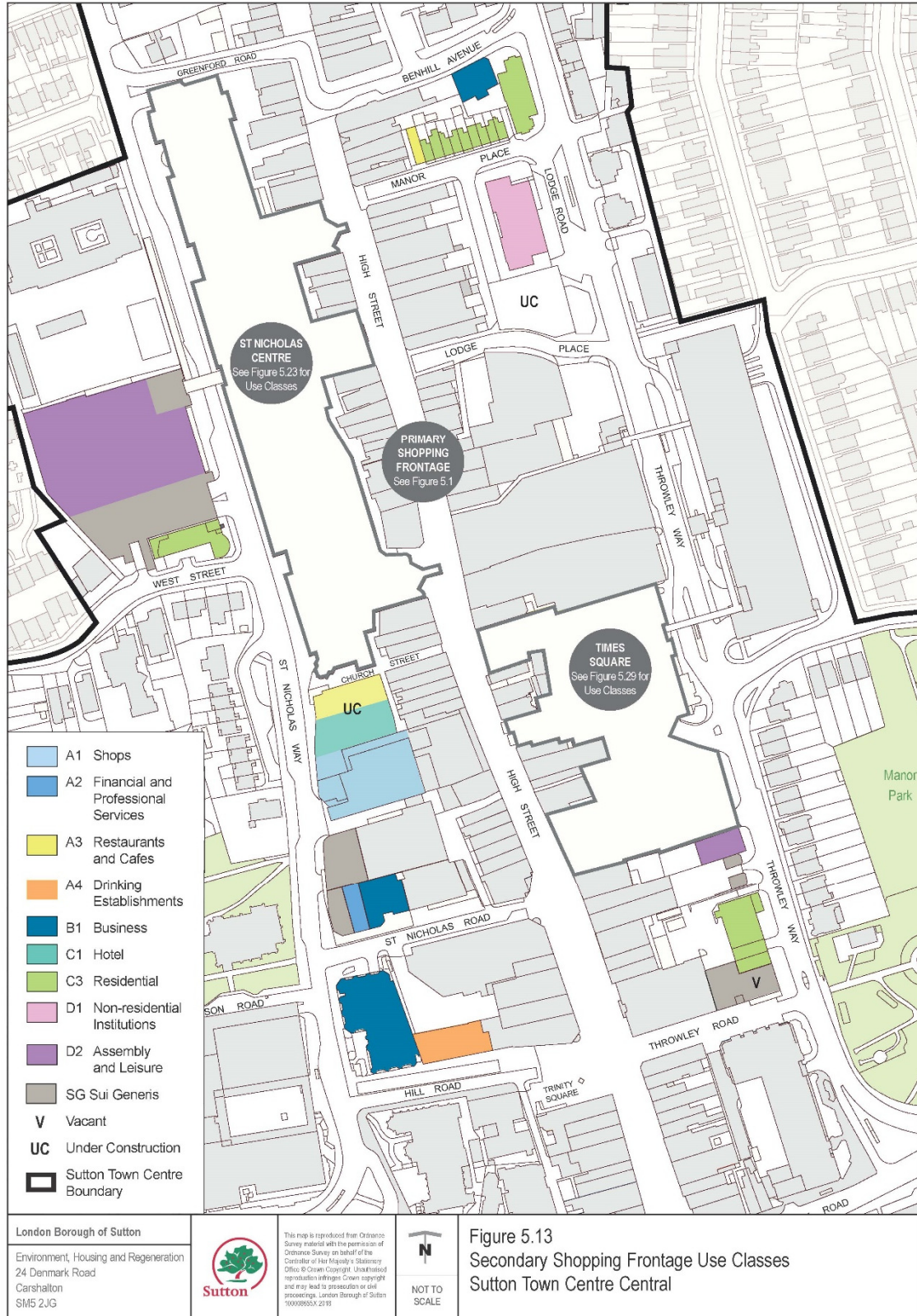
*Figure 5.12: Goad Sub Class for A1 Floorspace*



### C. Central Secondary Shopping Frontage

- 5.19 The central secondary shopping frontage is overshadowed by the primary shopping frontage. Hence, the number of units is lower than the other survey areas. This survey area is displayed in the Figure 5.13 below.

Figure 5.13: Central Secondary Shopping Frontage



5.20 Table 5.3 shows the total number of units and the total amount of floorspace by use class in the central secondary shopping frontage.

*Table: 5.3: Total Units and Floorspace (including vacancies)*

Use Class	Total Units	%	Total Floorspace	%
A1	0	0%	0	0%
A2	1	7%	152	0%
A3	1	7%	41	0%
A4	1	7%	349	1%
A5	0	0%	0	0%
B1	2	21%	21,454	70%
D1	1	7%	1,481	5%
D2	2	21%	5,234	17%
SG	3	29%	1,886	6%
<b>Total</b>	<b>14</b>	<b>100%</b>	<b>30,597</b>	<b>100%</b>

5.21 The total units in the central secondary shopping frontage are 14 and the total amount of floorspace is 30,597m<sup>2</sup>. The two key observations are (a) there are no A1 and A5 units and (b) the B1 floorspace takes up 70% of the total floorspace mainly because of the presence of Chancery House and St Nicholas House.

5.22 Figure 5.14 shows the occupied and vacant units and Figure 5.15 the occupied and vacant floorspace.

*Figure 5.14: Occupied and Vacant Units in Central Secondary Shopping Frontage*

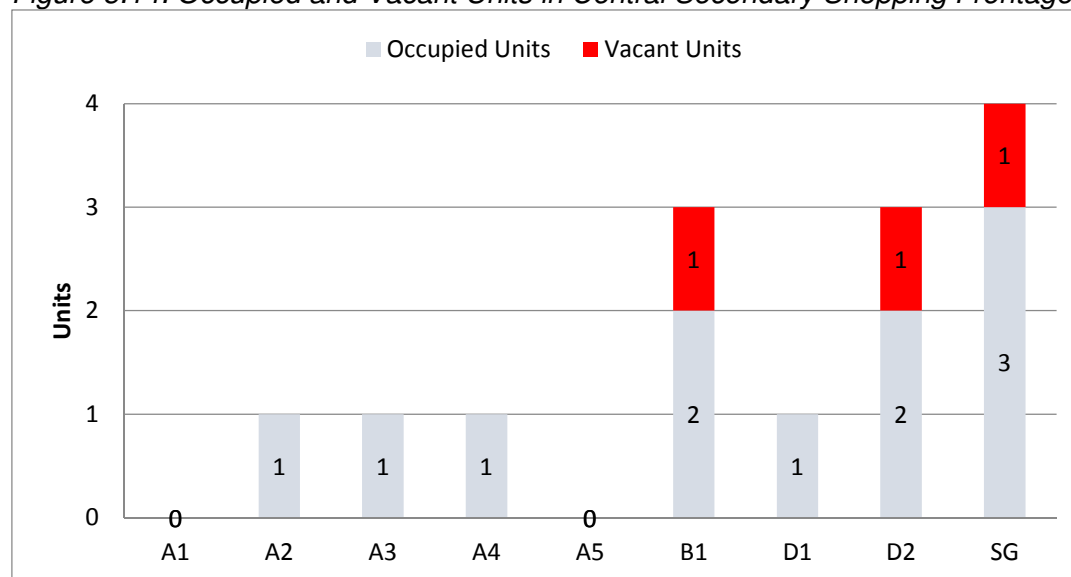
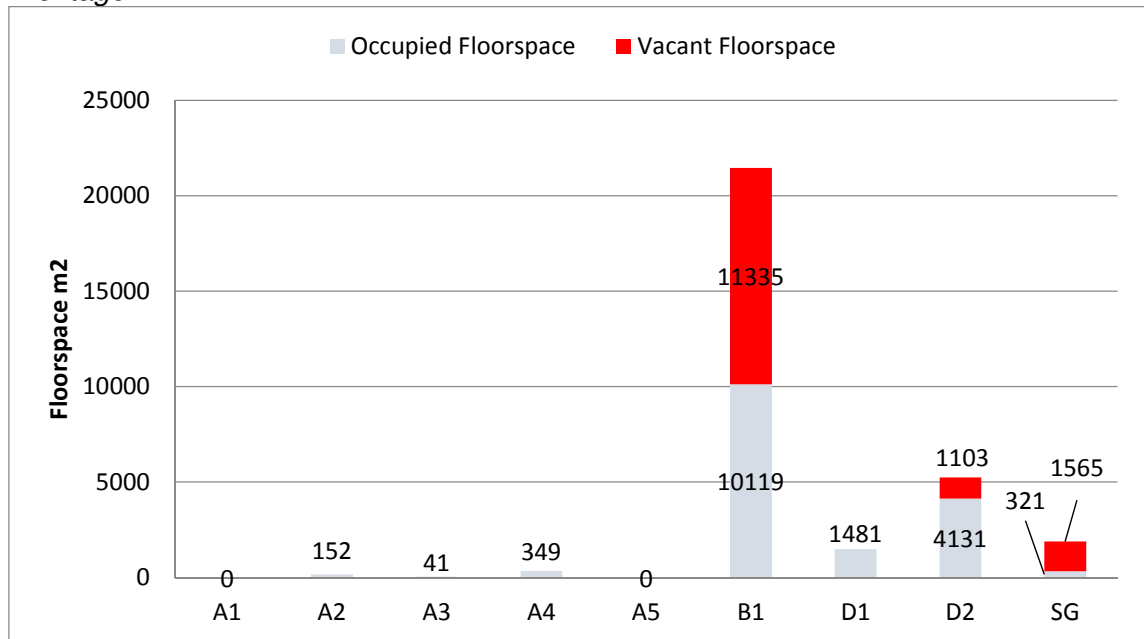


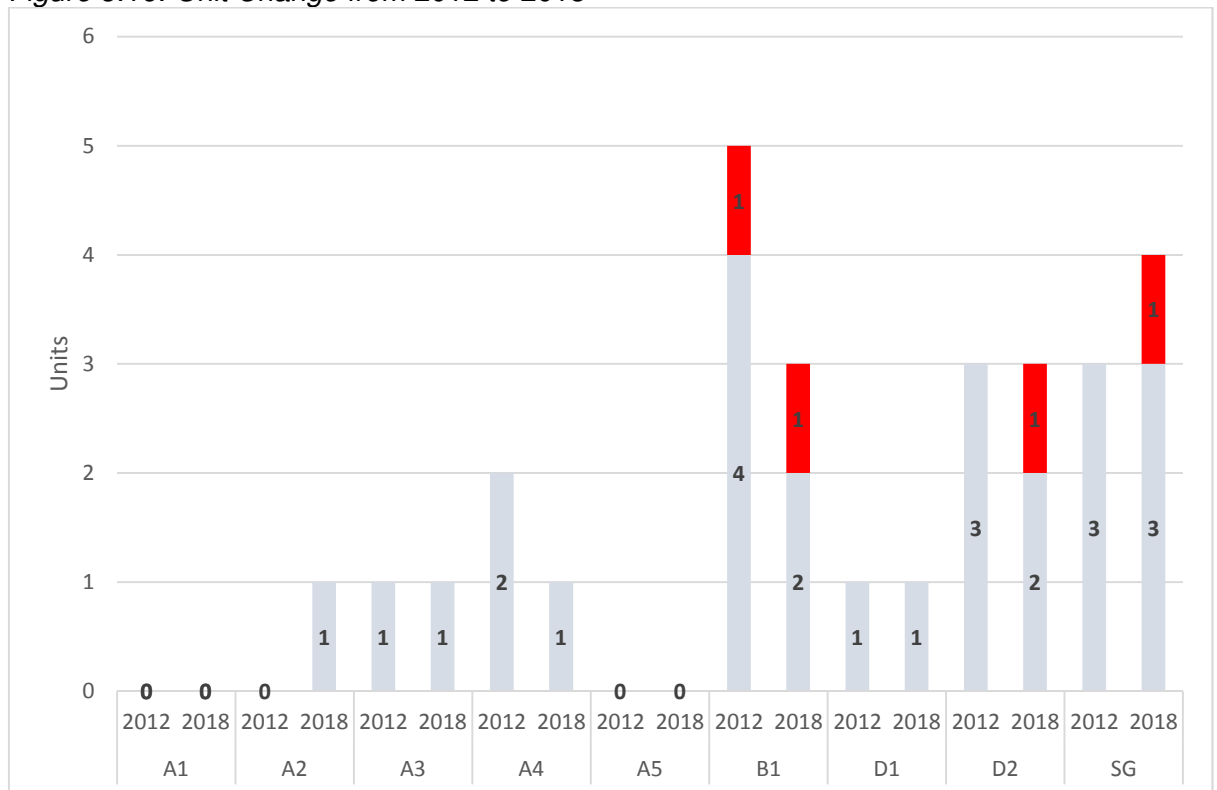
Figure 5.15: Occupied and Vacant Floorspace in Central Secondary Shopping Frontage



5.23 There are three vacant units in the total of 14 units. B1 vacant accounts for 37% of the total floorspace. The remaining use classes have significantly lower or no vacant floorspace.

5.24 Figure 5.16 shows the change to the number of units since the last health check in 2012.

Figure 5.16: Unit Change from 2012 to 2018



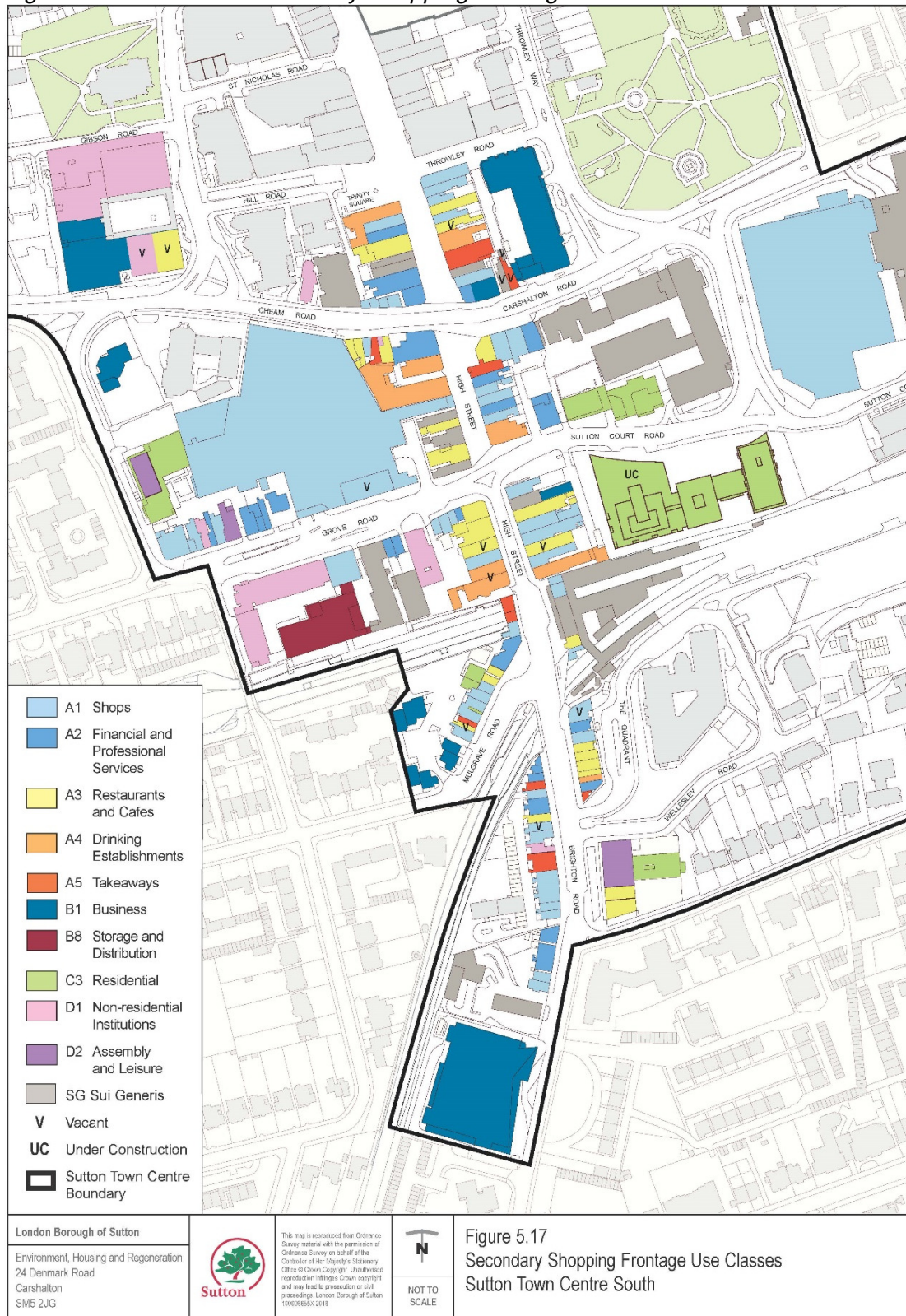


**D. Southern Secondary Shopping Frontage**

5.25 The Southern Secondary Shopping Frontage is displayed in the Figure 5.17 below.

5.25 The Southern Secondary Shopping Frontage is displayed in the Figure 5.17 below.

*Figure 5.17: Southern Secondary Shopping Frontage*





5.26 Table 5.4 shows the total number of units and the total amount of floorspace by use class in the southern secondary shopping frontage.

*Table: 5.4: Total Units and Floorspace (including vacancies)*

Use Class	Total Units	%	Total Floorspace	%
A1	44	30%	16,334	14%
A2	24	17%	5,079	4%
A3	27	19%	4,885	4%
A4	8	6%	7,402	6%
A5	11	8%	874	1%
B1	5	3%	29,086	25%
B8	1	1%	3,707	3%
D1	8	6%	6,014	5%
D2	2	1%	710	1%
SG	15	10%	41,470	36%
<b>Total</b>	<b>145</b>	<b>100%</b>	<b>115,561</b>	<b>100%</b>

5.27 The total units in the southern secondary shopping frontage are 145 and the total amount of floorspace is 115,561m<sup>2</sup>. The majority of units is A1 use class with 44 units while the highest amount of floorspace is taken by SG units with 41,470m<sup>2</sup> because of the presence of Police Quarters and Morrisons Car Park.

5.28 Figure 5.18 shows the occupied and vacant units and Figure 5.19 the occupied and vacant floorspace.

*Figure 5.18: Occupied and Vacant Units in Southern Secondary Shopping Frontage*

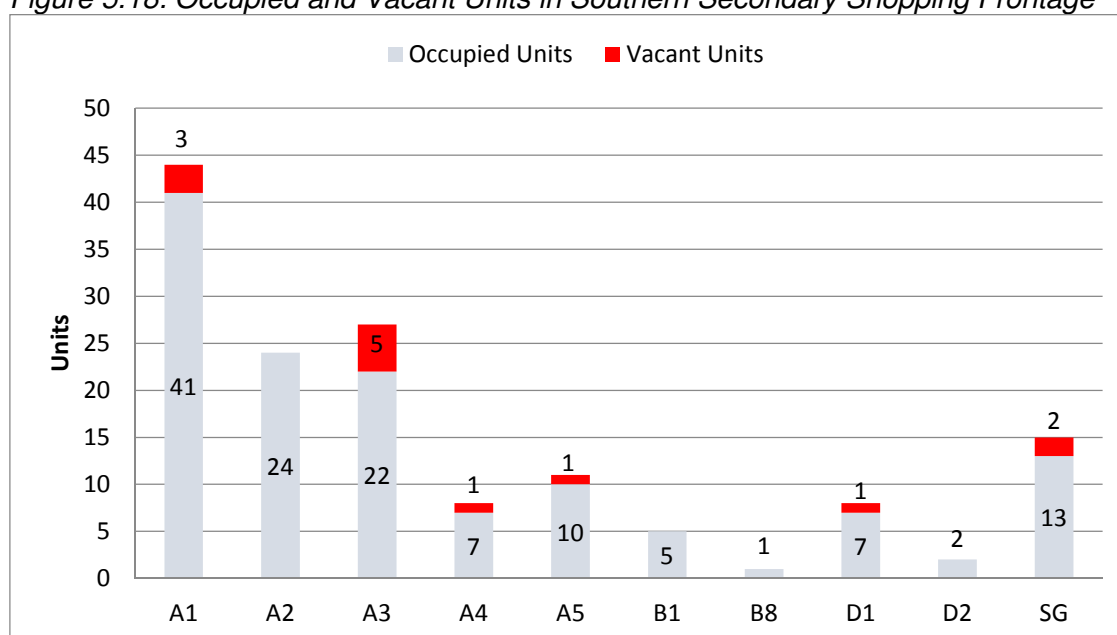
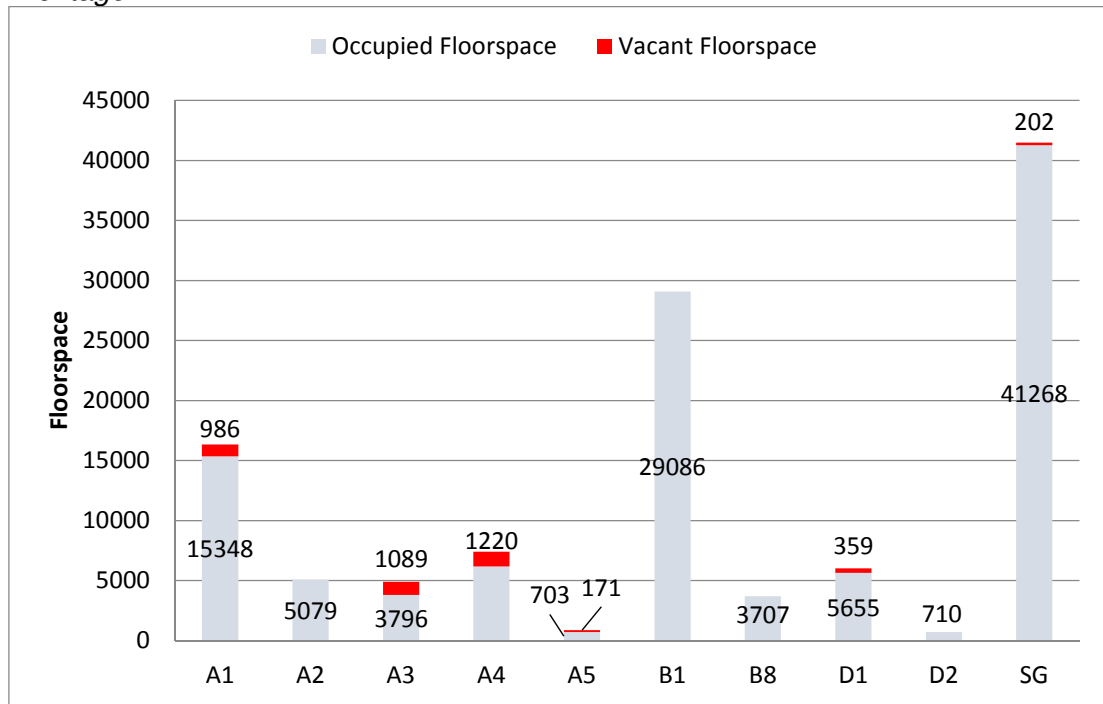


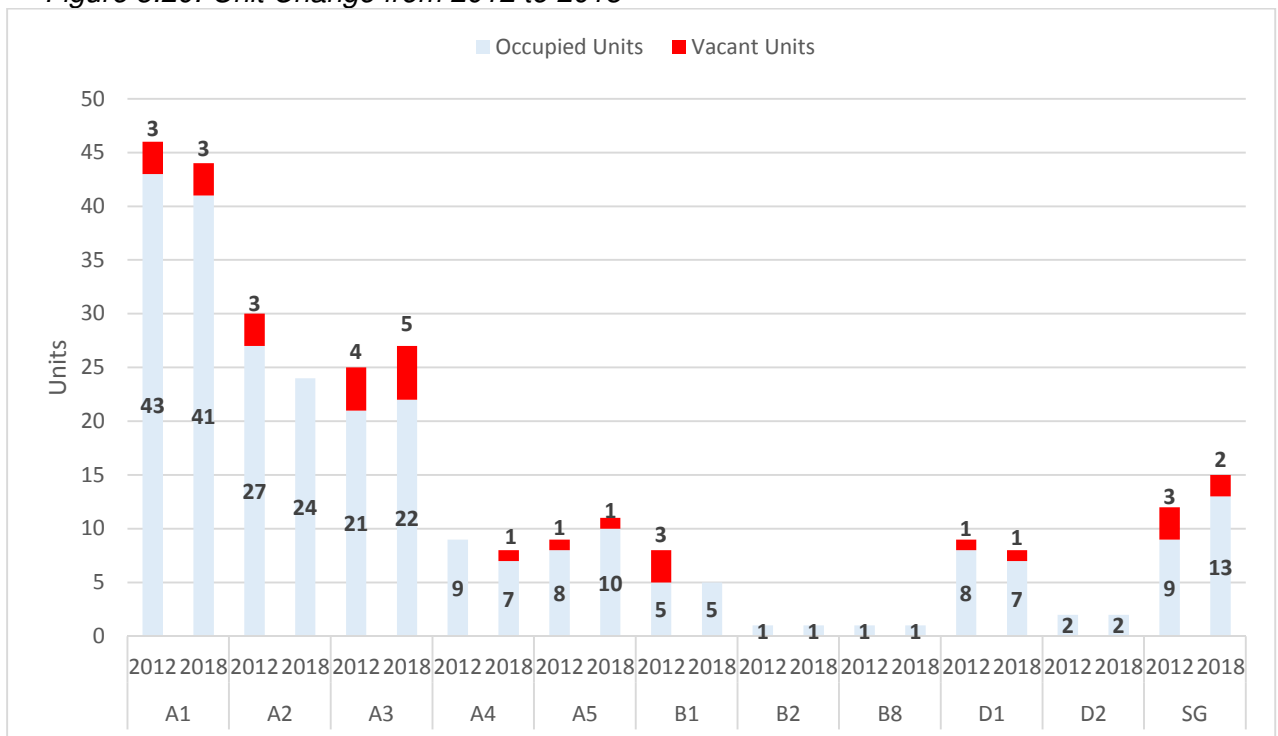
Figure 5.19: Occupied and Vacant Floorspace in Southern Secondary Shopping Frontage



5.29 There are 14 vacant units, which is 10% of the total units. Three of them are A1 and six are A3 units. The vacant floorspace is 4,327m<sup>2</sup>, which accounts for 4% of the total floorspace.

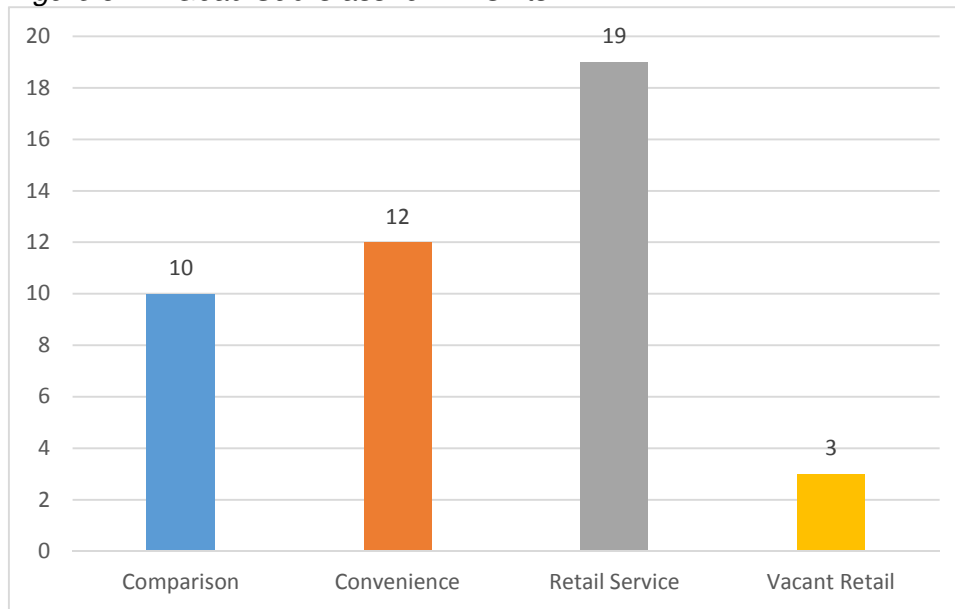
5.30 Figure 5.20 shows the change to the number of units since the last health check in 2012.

Figure 5.20: Unit Change from 2012 to 2018



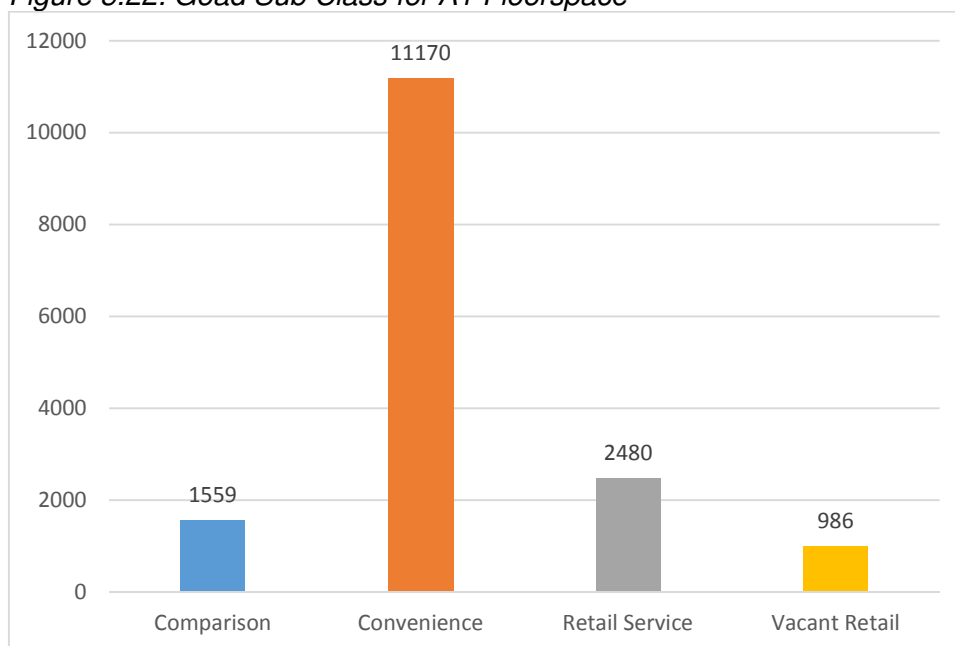
- 5.31 The total A1 units have dropped from 47 to 44. Also, there has been a decline in A2 units from 30 to 24. There has been an increase in A3, A5 and SG units while the number of A4, B1 and D1 units has slightly fallen.
- 5.32 The highest number of A1 units is retail service units with 19 out of 44. Figure 5.21 shows the Goad Sub Class breakdown for the A1 units.

*Figure 5.21: Goad Sub Class for A1 Units*



- 5.33 Convenience floorspace dominates the A1 floorspace with 69%. The vacant retail floorspace is 6%. Figure 5.22 shows the Goad Sub Class breakdown for the A1 floorspace.

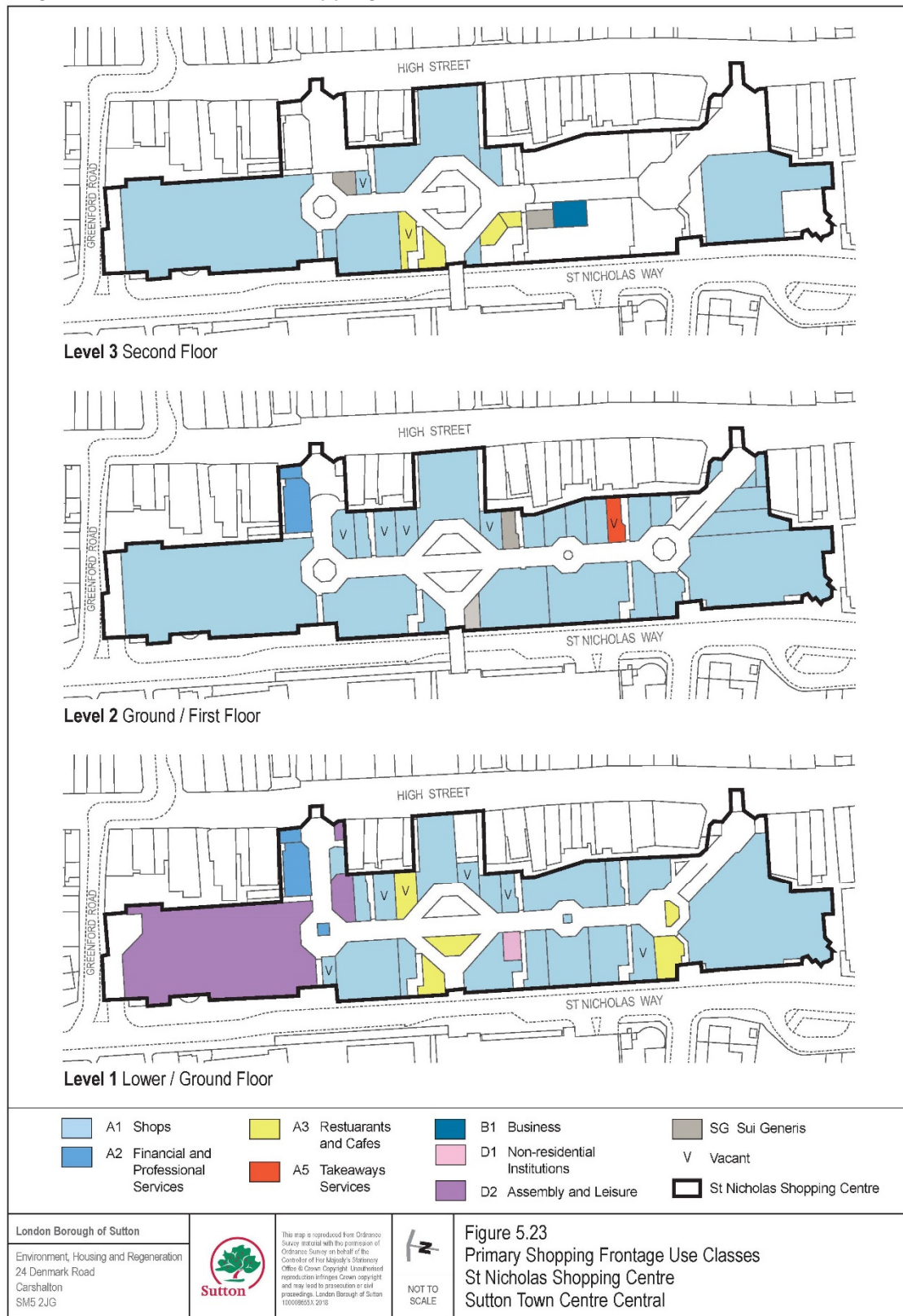
*Figure 5.22: Goad Sub Class for A1 Floorspace*



## E. St Nicholas Shopping Centre

- 5.34 St Nicholas Shopping Centre is part of the primary shopping frontage. This survey area is displayed in the Figure 5.23 below.

Figure 5.23: St Nicholas Shopping Centre



5.35 Table 5.5 shows the total number of units and the total amount of floorspace by use class in the primary shopping frontage.

*Table 5.5: Total Units and Floorspace (including vacancies)*

Use Class	Total Units	%	Total Floorspace	%
A1	49	73%	23,112	84%
A2	2	3%	367	1%
A3	7	10%	649	2%
A4	0	0%	0	0%
A5	2	3%	120	0%
B1	1	1%	150	1%
D1	1	1%	106	0%
D2	2	3%	2,596	9%
SG	3	4%	285	1%
<b>Total</b>	<b>67</b>	<b>100%</b>	<b>27,385</b>	<b>100%</b>

5.36 The total units in St Nicholas Centre are 67 and the total amount of floorspace is 27,385m<sup>2</sup>. A1 use class dominates the area with 49 units and 23,112m<sup>2</sup> of floorspace.

5.37 Figure 5.24 shows the occupied and vacant units and Figure 5.25 the occupied and vacant floorspace.

*Figure 5.24: Occupied and Vacant Units in St Nicholas Centre*

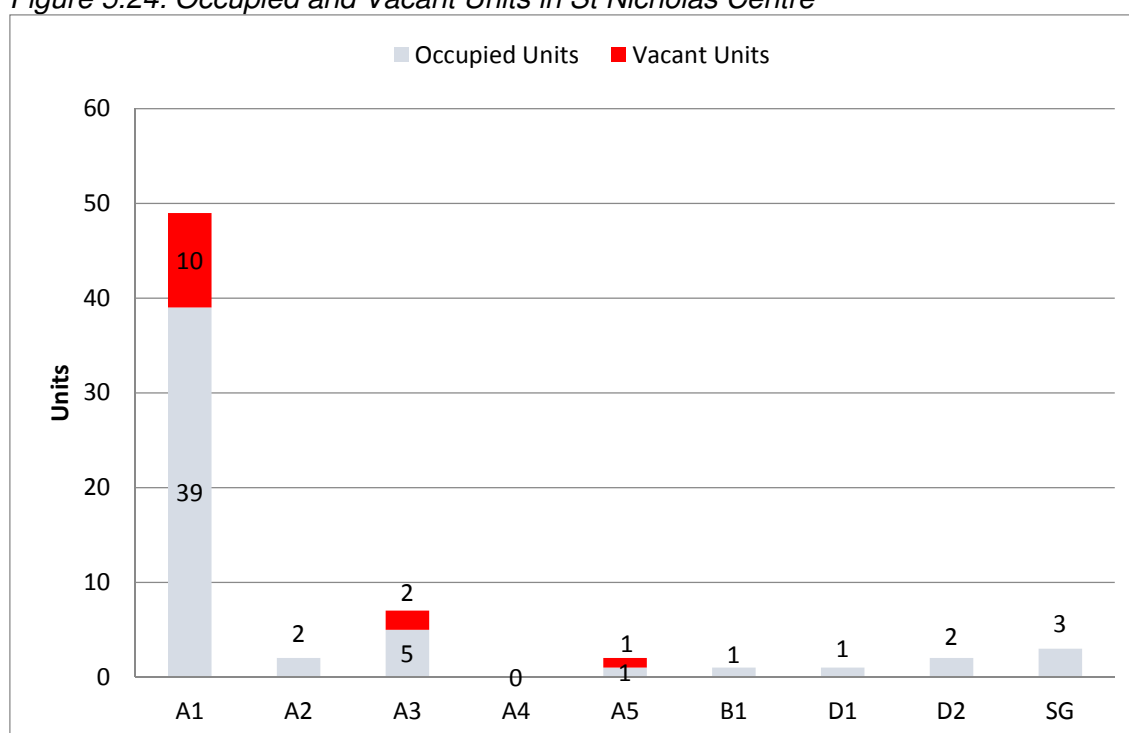
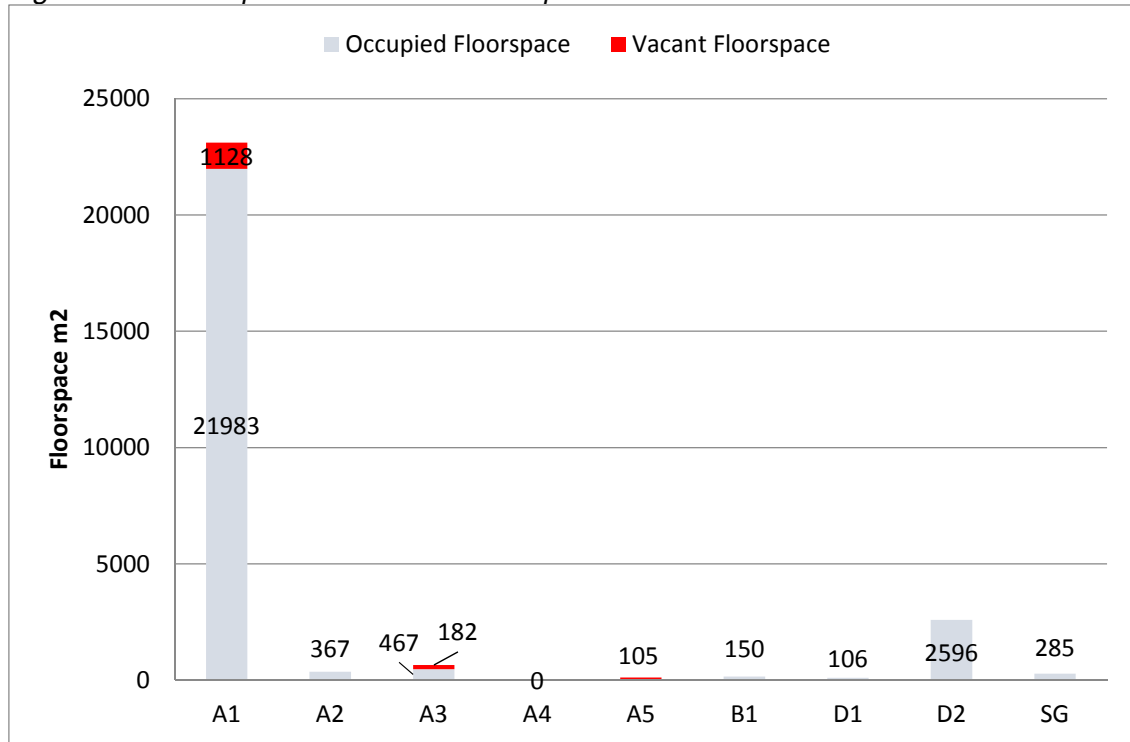


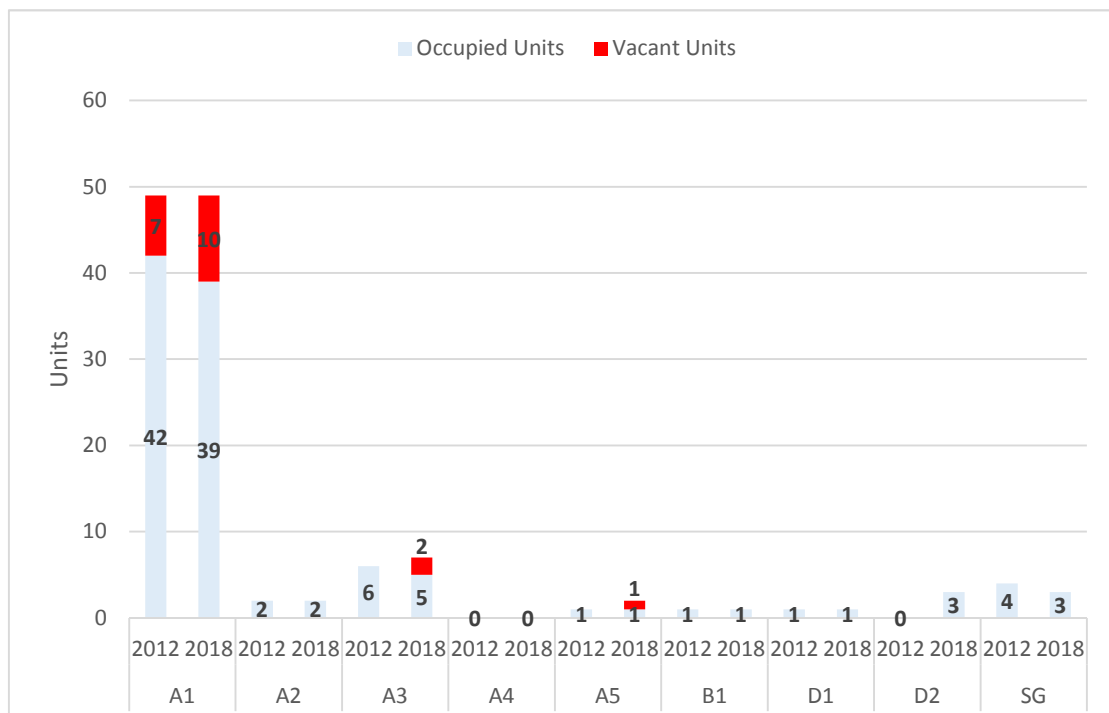
Figure 5.25: Occupied and Vacant Floorspace in St Nicholas Centre



5.38 There are 13 vacant units, which is 19% of the total units. Ten of them are vacant A1 units (15%). The vacant floorspace is 1,415m<sup>2</sup>, which accounts for 5% of the total floorspace. There is 1,128m<sup>2</sup> of vacant A1 floorspace giving a vacancy rate of 4%. The A3 and A5 use classes have negligible amount of vacant floorspace.

5.39 Figure 5.26 shows the change to the number of units since the last health check in 2012.

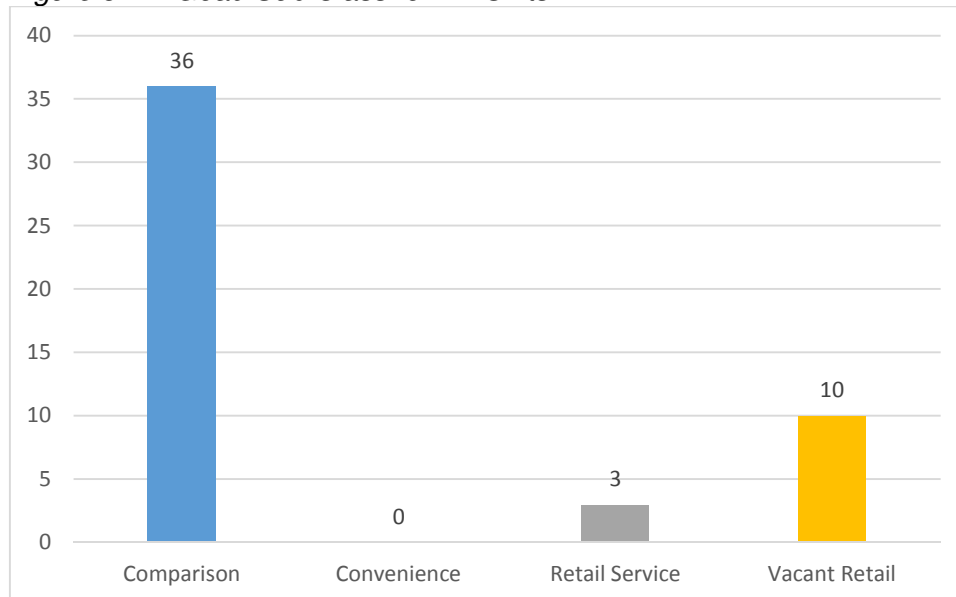
Figure 5.26: Unit Change from 2012 to 2018





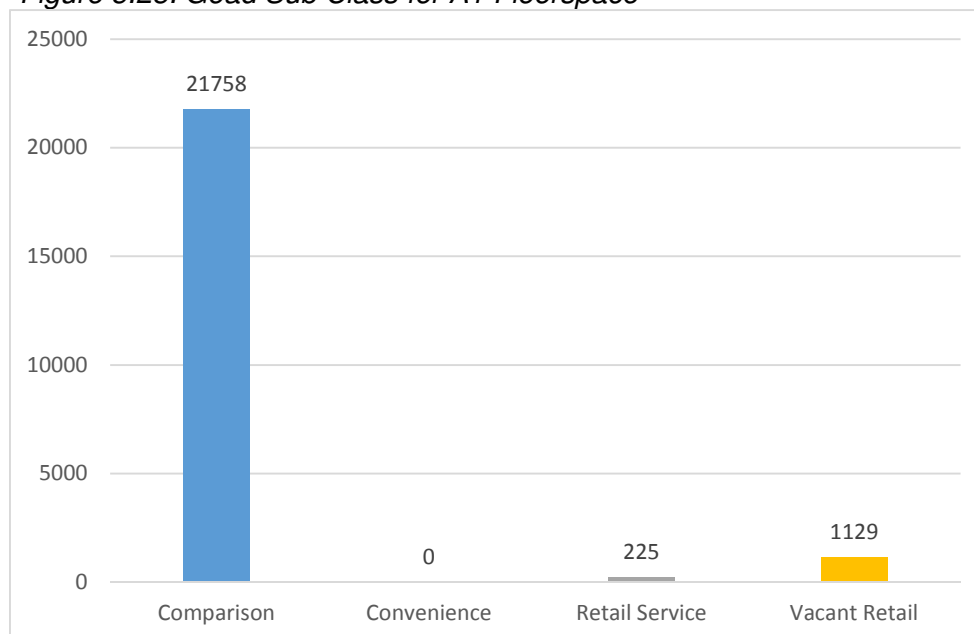
- 5.40 The total A1 units have remained the same at 49. Although there has been an increase in total A3 units, the occupied A3 units have dropped from six to five.
- 5.41 The vast majority of A1 units is comparison retail units with 36 out of 49. Figure 5.27 shows the Goad Sub Class breakdown for the A1 units.

*Figure 5.27: Goad Sub Class for A1 Units*



- 5.42 The comparison floorspace dominates the A1 floorspace with 94%. The vacant retail floorspace is 5%. Figure 5.28 shows the Goad Sub Class breakdown for the A1 floorspace.

*Figure 5.28: Goad Sub Class for A1 Floorspace*



## F. Times Square Shopping Centre

- 5.43 Times Square is part of the primary shopping frontage. This survey area is displayed in the Figure 5.29 below.

Figure 5.29: Times Square Shopping Centre



5.44 Table 5.6 shows the total number of units and the total amount of floorspace by use class in the primary shopping frontage.

*Table 5.6: Total Units and Floorspace (including vacancies)*

Use Class	Total Units	%	Total Floorspace	%
A1	16	67%	10,490	77%
A2	1	4%	25	0%
A3	4	17%	320	2%
A4	0	0%	0	0%
A5	1	4%	48	0%
D2	2	8%	2,699	20%
SG	0	0%	0	0%
<b>Total</b>	<b>24</b>	<b>100%</b>	<b>13,582</b>	<b>100%</b>

5.45 The total units in Times Square are 24 and the total amount of floorspace is 13,582m<sup>2</sup>. A1 use class dominates the area with 16 units and 10,490m<sup>2</sup> of floorspace.

5.46 Figure 5.30 shows the occupied and vacant units and Figure 5.31 the occupied and vacant floorspace.

*Figure 5.30: Occupied and Vacant Units in Times Square*

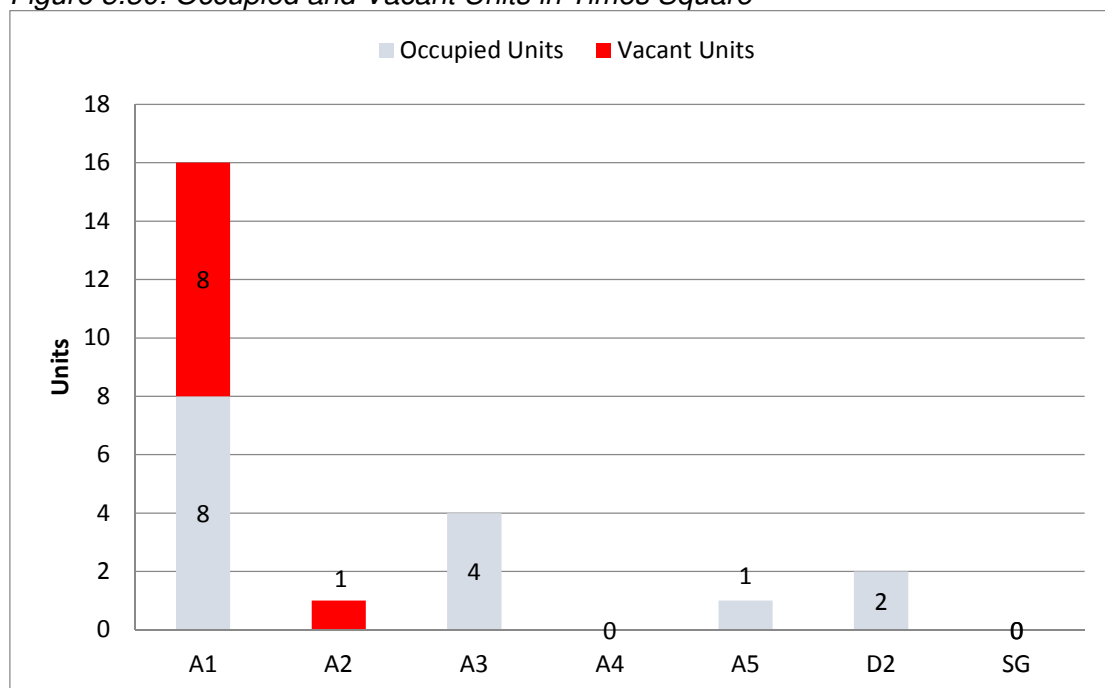
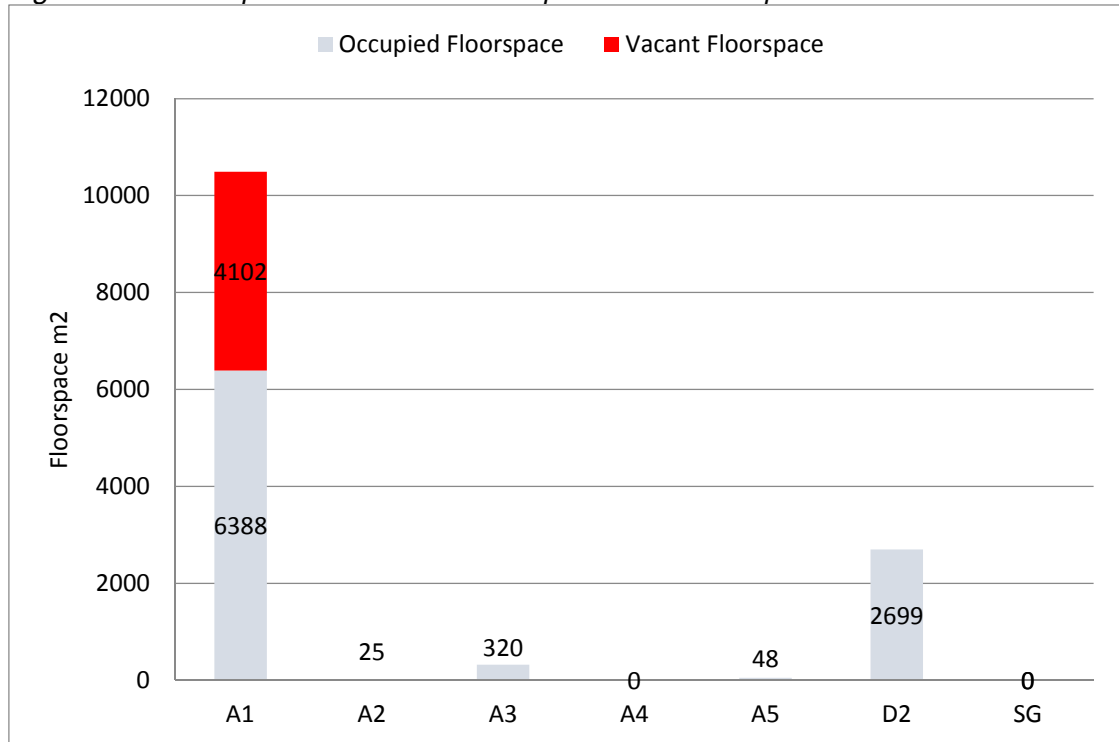


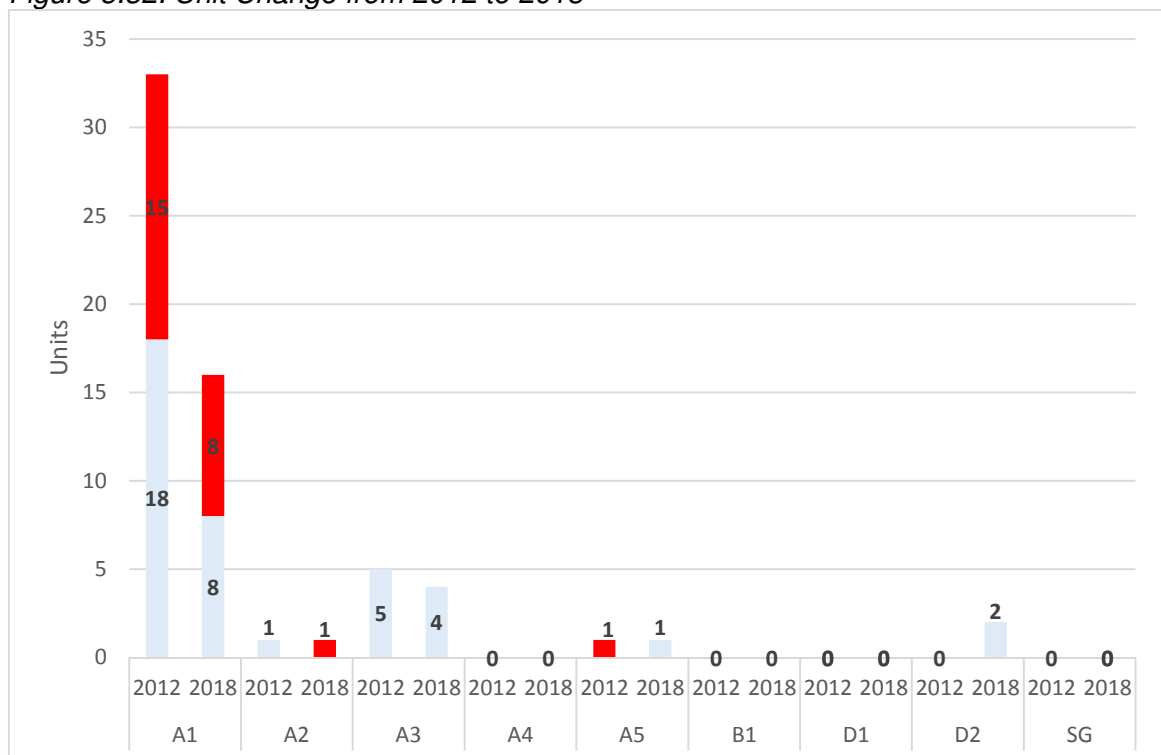
Figure 5.31: Occupied and Vacant Floorspace in Times Square



5.47 There are 9 vacant units, which is 38% of the total units. Eight of them are vacant A1 units (33%). The vacant A1 floorspace is 4,102m<sup>2</sup>, which accounts for 30% of the total floorspace. The A2 vacant unit has negligible amount of vacant floorspace.

5.48 Figure 5.32 shows the change to the number of units since the last health check in 2012.

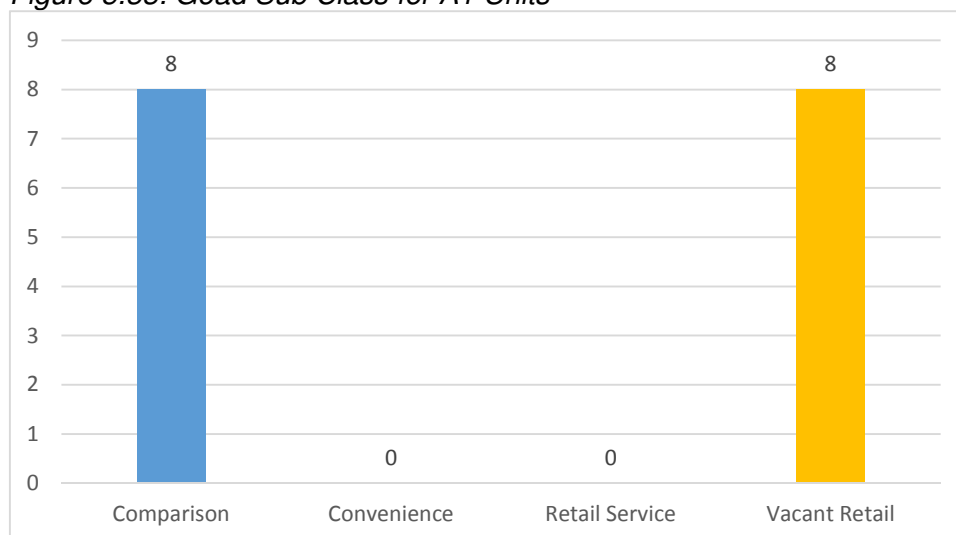
Figure 5.32: Unit Change from 2012 to 2018





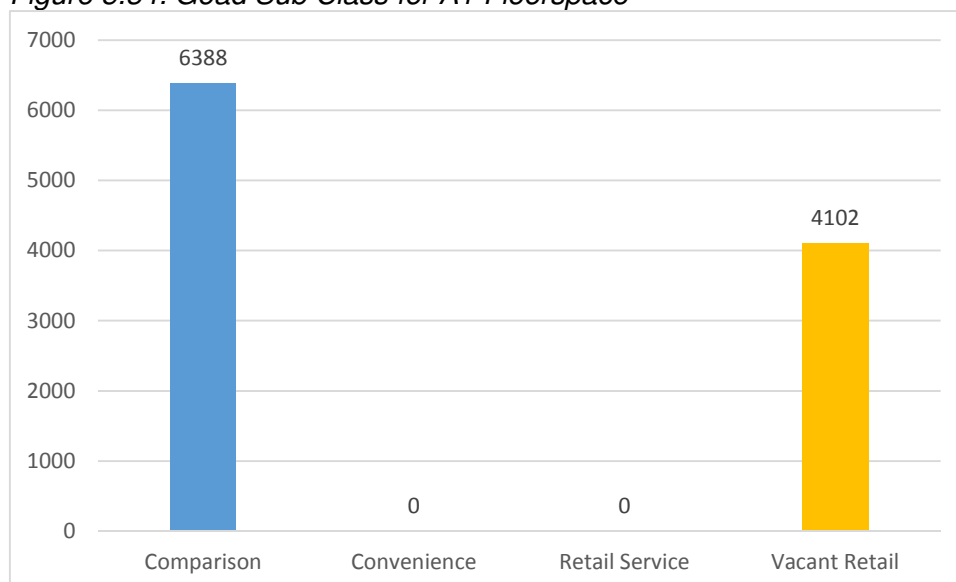
- 5.49 The total A1 units have dropped from 33 to 16. This is mainly because 15 A1 units were merged and now form the Pure Gym which is one D2 unit. The other use classes have not changed remarkably.
- 5.50 All eight occupied A1 units are comparison retail units. The rest of them are vacant retail units. Figure 5.33 shows the Goad Sub Class breakdown for the A1 units.

*Figure 5.33: Goad Sub Class for A1 Units*



- 5.51 The comparison floorspace covers 61% of the A1 floorspace. The rest is vacant retail floorspace. Figure 5.34 shows the Goad Sub Class breakdown for the A1 floorspace.

*Figure 5.34: Goad Sub Class for A1 Floorspace*



## G. Summary of the Primary Shopping Frontage

5.52 The percentage of the A1 units in the primary shopping frontage is shown in Table 5.7.

Table 5.7: A1% Units in Primary Shopping Frontage

	High Street & Surroundings (only ground floor units)		St Nicholas Centre		Times Square		Total	
	Incl. Vacant Units	Occupied	Incl. Vacant Units	Occupied	Incl. Vacant Units	Occupied	Incl. Vacant Units	Occupied
<b>A1 Units</b>	67	58	49	39	16	8	132	105
<b>All Classes</b>	89		67		24		182	
<b>A1%</b>	75.3%	65.2%	73.1%	58.2%	66.7%	33.3%	73.3%	58.3%

5.53 The percentage of the A1 units in the primary shopping frontage is shown in Table 5.8.

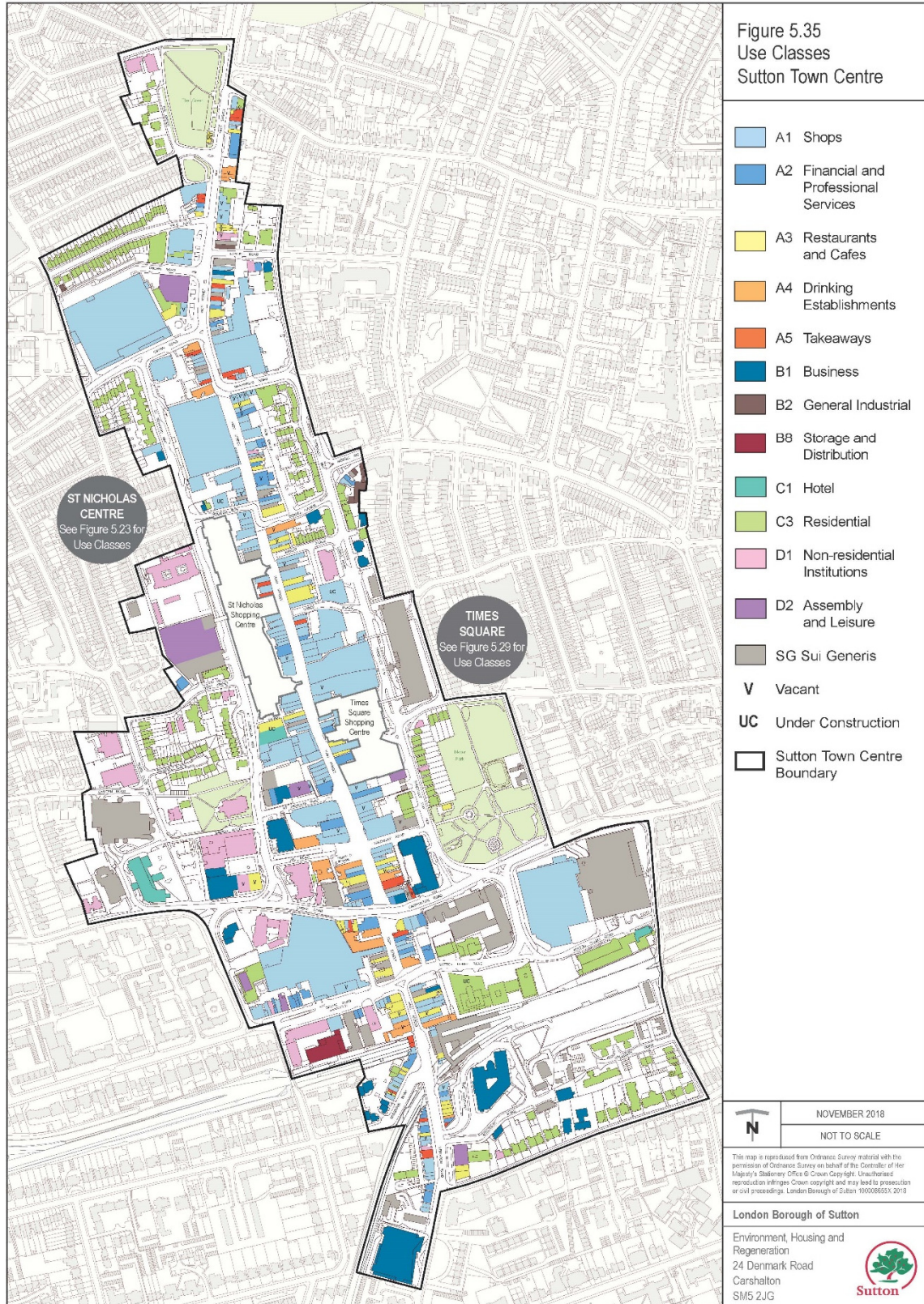
Table 5.8: A1% Floorspace in Primary Shopping Frontage

	High Street & Surroundings (only ground floor units)		St Nicholas Centre		Times Square		Total	
	Incl. Vacant Fl.	Occupied	Incl. Vacant Fl.	Occupied	Incl. Vacant Fl.	Occupied	Incl. Vacant Fl.	Occupied
<b>A1 Units</b>	44,132	33,580	23,112	21,983	10,490	6,388	77,734	61,951
<b>All Classes</b>	53,755		27,385		13,582		94,722	
<b>A1%</b>	82.1%	62.5%	84.4%	80.3%	77.2%	47.0%	82.1%	65.4%

## H. Sutton Town Centre

- 5.54 The Sutton Town Centre use class analysis gives the full picture and compares the nature of each of the aforementioned areas. Sutton Town Centre is displayed in the Figure 5.35 below.

Figure 5.35: Sutton Town Centre



5.55 Table 5.9 shows the total number of units and the total amount of floorspace in Sutton Town Centre including upper floors but excluding C1 and C3 use classes.

*Table 5.9: Total Units and Floorspace (including vacancies)*

Use Class	Total Units	%	Total Floorspace	%
A1	236	41%	137,692	27%
A2	72	13%	23,339	5%
A3	65	11%	11,683	2%
A4	13	2%	10,865	2%
A5	27	5%	2,541	0%
B1	46	8%	107,446	21%
B2	4	1%	815	0%
B8	6	1%	4,416	1%
D1	34	6%	31,805	6%
D2	13	2%	15,236	3%
SG	58	10%	171,911	33%
<b>Total</b>	<b>574</b>	<b>100%</b>	<b>517,749</b>	<b>100%</b>

5.56 The total units in Sutton Town Centre are 574 and the total amount of floorspace is 517,749m<sup>2</sup>. There are also 164 residential units (C3) and 2 hotels (C1) which are excluded from the calculations. The highest number of units is A1 with 236 units while the highest amount of floorspace is taken by SG units with 171,911m<sup>2</sup>.

5.57 Figure 5.36 shows the occupied and vacant units and Figure 5.37 the occupied and vacant floorspace.

*Figure 5.36: Occupied and Vacant Units in Sutton Town Centre*

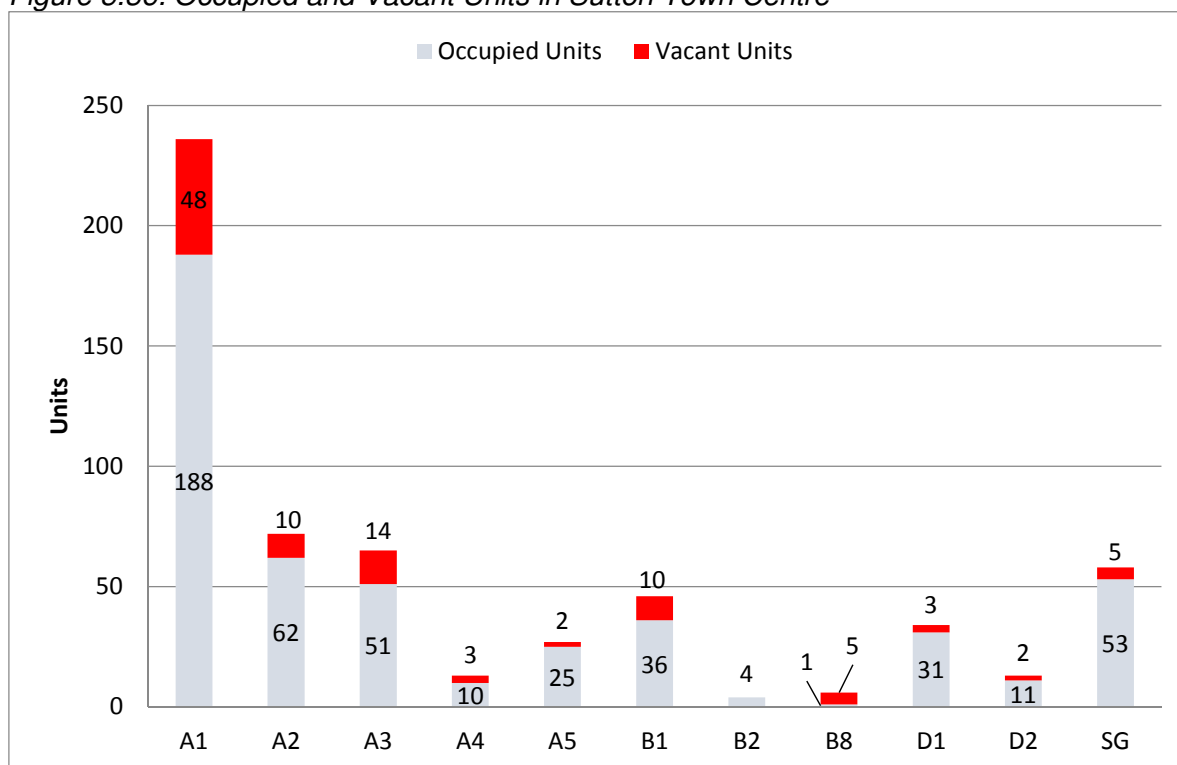
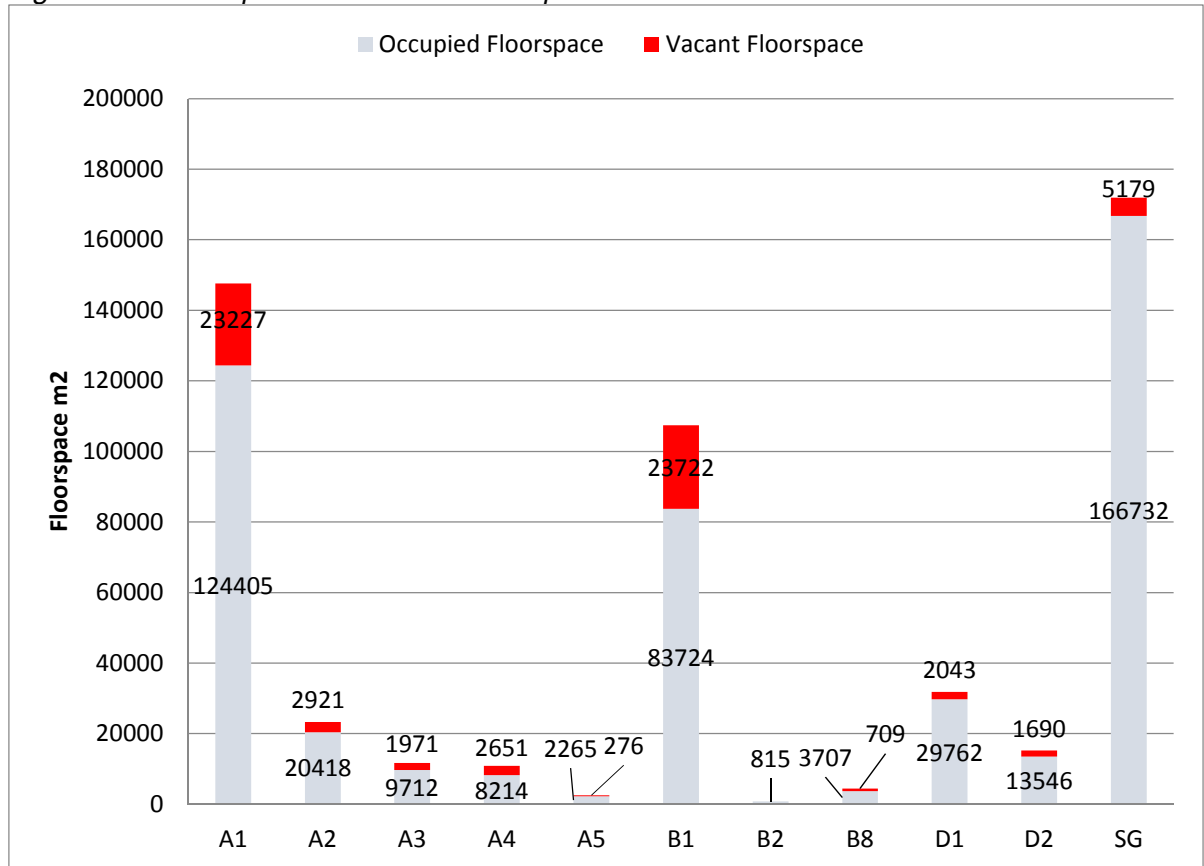




Figure 5.37: Occupied and Vacant Floorspace in Sutton Town Centre

























5.58 In terms of units, A1 use class dominates with 236 units. This is 41% of the total units while A2, A3 and SG occupy a little more than 10% each.

5.59 In terms of floorspace, 81% is occupied by the A1, B1 and SG use classes. The amount of A1 floorspace is 27% of the total floorspace. The SG units cover one third of the total floorspace but only 10% of the total units.

5.60 There are 102 vacant units, which is 18% of the total units. The vacant floorspace is 64,389m<sup>2</sup>, which accounts for 12% of the total floorspace.

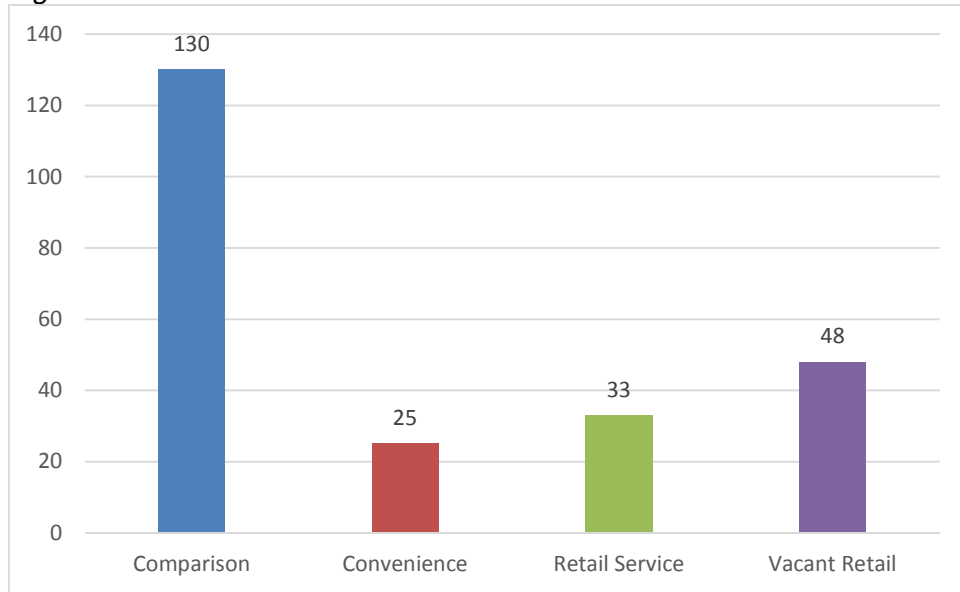
5.61 Table 5.10 shows an overview of the change to the number of units since the last health check in 2012.

Table 5.10: Unit Change from 2012 to 2018

Use Class	Status	Occupied	Vacant	Total Units	Change
A1	2012	211	42	 253	-17
	2018	188	48	 236	
A2	2012	75	7	 82	-10
	2018	62	10	 72	
A3	2012	57	5	 62	3
	2018	51	14	 65	
A4	2012	15	1	 16	-3
	2018	10	3	 13	
A5	2012	19	2	 21	6
	2018	25	2	 27	
B1	2012	51	23	 74	-28
	2018	36	10	 46	
B2	2012	2	0	 2	2
	2018	4	0	 4	
B8	2012	2	0	 2	4
	2018	1	5	 6	
D1	2012	25	1	 26	8
	2018	31	3	 34	
D2	2012	7	1	 8	5
	2018	11	2	 13	
SG	2012	44	4	 48	10
	2018	53	5	 58	

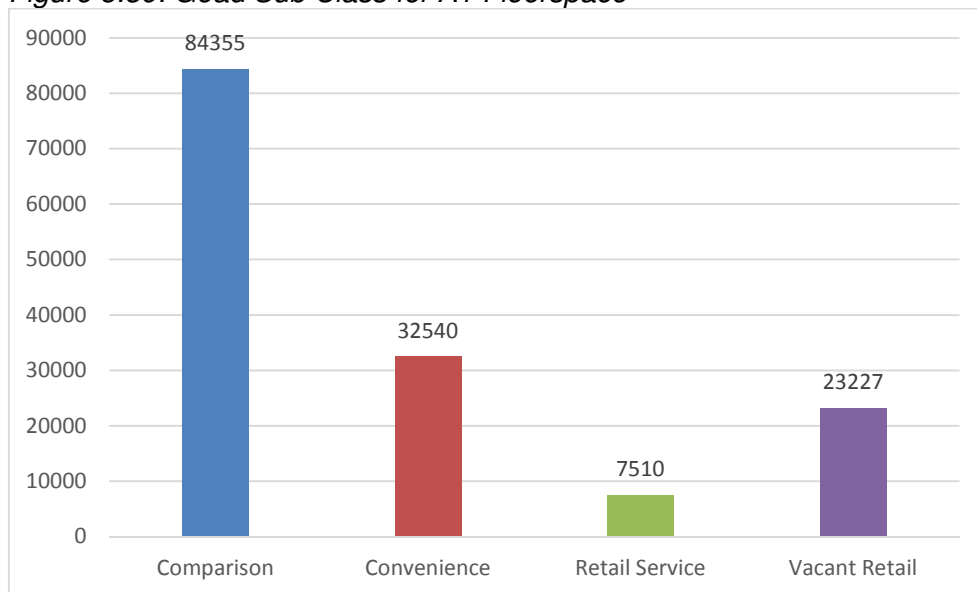
- 5.62 There has been a decrease in A1, A2, A4 and B1 use classes. The biggest drop has occurred in B1 units because 12 of them have changed to residential units (C3). Although the total A3 units have slightly increased, the occupied A3 units have dropped from 57 to 51.
- 5.63 The majority of the lost A1 units were either demolished as part of Zurich Building or converted to D2 units as part of Pure Gym in Times Square.
- 5.64 The A1 comparison units are 130, which accounts for 55% of the total. Convenience, retail service and vacant retail account for 11%, 14% and 20% respectively. Figure 5.38 shows the Goad Sub Class breakdown for the A1 units.
- 5.65 The detailed comparison tables for Sutton Town Centre can be found in Appendix A.

*Figure 5.38: Goad Sub Class for A1 Units*



5.66 The majority of A1 floorspace is taken by comparison units (57%). The convenience units occupy 22% and the vacant retail occupy 16%. Figure 5.39 shows the Goad Sub Class breakdown for the A1 floorspace.

*Figure 5.39: Goad Sub Class for A1 Floorspace*



## 6 Conclusions

### Primary Shopping Frontage

- 6.1 The total units in the primary shopping frontage are 180. A1 units dominate the primary shopping frontage, occupying 73% of the total units. A1 units in St Nicholas Centre occupy similar proportion at 73%. Times Square gives the lowest proportion as several of the A1 units have converted to D2.
- 6.2 The total floorspace in the primary shopping frontage is 94,722m<sup>2</sup>. 82% is occupied by A1 uses, predominantly A1 comparison.
- 6.3 The vacancy rate in terms of units is 18%. 27 of the 33 vacant units are A1. This is 20% of the total number of A1 units. There is a low vacancy rate for other uses.
- 6.4 The vacant floorspace accounts for 18% of the total floorspace. The vacant A1 floorspace occupies 20% of the total floorspace.
- 6.5 In terms of retail uses, 96 units sell comparison goods and four units sell convenience goods.

### Secondary Shopping Frontage

- 6.6 The total units in the primary shopping frontage are 257. In terms of the highest proportion by use class, A1 units occupy 32% of the total units. A2 and A3 occupy 14% and 16% respectively.
- 6.7 The total floorspace in the secondary shopping frontage is 179,418m<sup>2</sup>. In terms of the highest proportion by use class, 29% is occupied by B1 uses. 26% is occupied by SG uses and 21% by A1 uses.
- 6.8 The vacancy rate in terms of units is 13%. Only 4% of the A1 units are vacant. However, this is 12% of the total number of A1 units. It is worth noting that ten of the 42 A3 units are vacant.
- 6.9 The vacant floorspace accounts for 12% of the total floorspace. Much of this is made by B1 floorspace. There is a low vacancy rate for other uses, for example only 1% of the A1 floorspace is vacant.
- 6.10 In terms of retail uses, 25 units sell comparison goods and 20 units sell convenience goods.

### Sutton Town Centre

- 6.11 The total units in the Sutton Town Centre are 574. In terms of the highest proportion of uses, A1 units occupy 41% of the total units. A2, A3 and SG occupy 13%, 11% and 10% respectively.
- 6.12 The second most common land use in terms of units is C3 residential uses. However, these units have been excluded from the calculations.
- 6.13 The total floorspace in the Sutton Town Centre is 527,689m<sup>2</sup>. One third of the total is SG floorspace. This is mainly because of the presence of the car parks. 28% is occupied by A1 floorspace and 20% is occupied by B1 floorspace.



- 6.14 The vacancy rate in terms of units is 18%, where 102 units of the 574 are vacant. 47% of these vacant units are A1 units. However, the vacant A1 units are only 20% of the total number of A1 units.
- 6.15 There has been noticeable change in the composition of Sutton Town Centre since 2012. The total number of units, excluding the residential and hotel uses, has decreased by 20 units. However, this is mainly because of the conversion of a number of units into a few big units. For example there are three new gyms which occupy more than one unit.
- 6.16 The demolition and development of some sites has changed the composition of a few locations in Sutton Town Centre. The total number of units overall has increased because of the increase of the number of residential units.
- 6.17 The number of B1 offices has decreased from 74 units to 46 units. The number of A1 retail units has decreased from 253 units to 236 units. The land uses which have increased in units are A3, A5, D1, D2 and SG.
- 6.18 A1 retail uses dominate the primary shopping frontage and to a lesser extent the remainder of Sutton Town Centre.
- 6.19 In terms of retail uses, 130 units sell comparison goods and 25 units sell convenience goods.

## Appendix A

### Primary Shopping Frontage

Use Class	Units	% Units	Floorspace	% Floorspace	Vacant Units	%	Vacant Floorspace	%	Total Units	%	Total Floorspace	%
A1	105	58%	61951	65%	27	15%	15783	17%	132	73%	77734	82%
A2	8	4%	2697	3%	1	0%	25	0%	9	5%	2722	3%
A3	15	8%	3557	4%	3	2%	306	0%	18	10%	3863	4%
A4	0	0%	0	0%	1	0%	1142	1%	1	1%	1142	1%
A5	5	3%	839	1%	1	0%	105	0%	6	3%	944	1%
B1	1	1%	150	0%	0	0%	0	0%	1	1%	150	0%
B2	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
B8	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
D1	1	1%	106	0%	0	0%	0	0%	1	1%	106	0%
D2	5	3%	6666	7%	0	0%	0	0%	5	3%	6666	7%
SG	7	4%	1395	1%	0	0%	0	0%	7	4%	1395	1%
<b>Total</b>	<b>147</b>	<b>82%</b>	<b>77361</b>	<b>82%</b>	<b>33</b>	<b>18%</b>	<b>17361</b>	<b>18%</b>	<b>180</b>	<b>100%</b>	<b>94722</b>	<b>100%</b>

## Secondary Shopping Frontage

Use Class	Units	% Units	Floorspace	% Floorspace	Vacant Units	%	Vacant Floorspace	%	Total Units	%	Total Floorspace	%
A1	73	28%	34976	19%	10	4%	2168	1%	83	32%	37144	21%
A2	33	13%	6548	4%	3	1%	1349	1%	36	14%	7897	4%
A3	32	12%	4783	3%	10	4%	1586	1%	42	16%	6369	4%
A4	10	4%	7517	4%	2	1%	1510	1%	12	5%	9027	5%
A5	20	8%	1461	1%	1	0%	171	0%	21	8%	1632	1%
B1	10	4%	40085	22%	1	0%	11335	6%	11	4%	51420	29%
B2	1	0%	437	0%	0	0%	0	0%	1	0%	437	0%
B8	1	0%	3707	2%	0	0%	0	0%	1	0%	3707	2%
D1	10	4%	7368	4%	2	1%	488	0%	12	5%	7856	4%
D2	5	2%	5949	3%	1	0%	1103	1%	6	2%	7052	4%
SG	29	11%	45110	25%	3	1%	1767	1%	32	12%	46877	26%
<b>Total</b>	<b>224</b>	<b>87%</b>	<b>157941</b>	<b>88%</b>	<b>33</b>	<b>13%</b>	<b>21477</b>	<b>12%</b>	<b>257</b>	<b>100%</b>	<b>179418</b>	<b>100%</b>

### Sutton Town Centre Overall 2018

Use Class	Units	% Units	Floorspace	% Floorspace	Vacant Units	%	Vacant Floorspace	%	Total Units	%	Total Floorspace	%
A1	188	33%	124405	24%	48	8%	23227	4%	236	41%	147632	28%
A2	62	11%	20418	4%	10	2%	2921	1%	72	13%	23339	4%
A3	51	9%	9712	2%	14	2%	1971	0%	65	11%	11683	2%
A4	10	2%	8214	2%	3	1%	2651	1%	13	2%	10865	2%
A5	25	4%	2265	0%	2	0%	276	0%	27	5%	2541	0%
B1	36	6%	83724	16%	10	2%	23722	4%	46	8%	107446	20%
B2	4	1%	815	0%	0	0%	0	0%	4	1%	815	0%
B8	1	0%	3707	1%	5	1%	709	0%	6	1%	4416	1%
D1	31	5%	29762	6%	3	1%	2043	0%	34	6%	31805	6%
D2	11	2%	13546	3%	2	0%	1690	0%	13	2%	15236	3%
SG	53	9%	166732	32%	5	1%	5179	1%	58	10%	171911	33%
<b>Total</b>	<b>472</b>	<b>82%</b>	<b>463300</b>	<b>88%</b>	<b>102</b>	<b>18%</b>	<b>64389</b>	<b>12%</b>	<b>574</b>	<b>100%</b>	<b>527689</b>	<b>100%</b>
C1	2		10603									
C2	0		0									
C3	164		107054									

### Goad Sub Class for A1

Goad Sub Class for A1	Units	% Units	Floorspace	% Floorspace
Comparison	130	55.1%	84355	57%
Convenience	25	10.6%	32540	22%
Retail Service	33	14.0%	7510	5%
Vacant Retail	48	20.3%	23227	16%
<b>Total</b>	<b>236</b>	<b>100%</b>	<b>147632</b>	<b>100%</b>

# Sutton Town Centre Overall 2012

Use Class	Units	% Units	Floorspace	% Floorspace	Vacant Units	%	Vacant Floorspace	%	Total Units	%	Total Floorspace	%
A1	211	36%	128148	24%	42	7%	7804	1%	253	43%	135952	25%
A2	75	13%	21319	4%	7	1%	1721	0%	82	14%	23040	4%
A3	57	10%	9791	2%	5	1%	1120	0%	62	10%	10911	2%
A4	15	3%	11809	2%	1	0%	258	0%	16	3%	12067	2%
A5	19	3%	2017	0%	2	0%	219	0%	21	4%	2236	0%
B1	51	9%	106870	20%	23	4%	31285	6%	74	12%	138155	26%
B2	2	0%	324	0%	0	0%	0	0%	2	0%	324	0%
B8	2	0%	3917	1%	0	0%	0	0%	2	0%	3917	1%
D1	25	4%	30465	6%	1	0%	359	0%	26	4%	30824	6%
D2	7	1%	9148	2%	1	0%	587	0%	8	1%	9735	2%
SG	44	7%	170736	32%	4	1%	323	0%	48	8%	171059	32%
<b>Total</b>	<b>508</b>	<b>86%</b>	<b>494544</b>	<b>92%</b>	<b>86</b>	<b>14%</b>	<b>43676</b>	<b>8%</b>	<b>594</b>	<b>100%</b>	<b>538220</b>	<b>100%</b>
C1	1		8782									
C2	0		0									
C3	104		65798									



## Appendix B

### Use Classes

#### Part A

- **A1 Shops** - Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes.
- **A2 Financial and professional services** - Financial services such as banks and building societies, professional services (other than health and medical services) and including estate and employment agencies. It does not include betting offices or payday loan shops - these are now classed as “sui generis” uses (see below).
- **A3 Restaurants and cafés** - For the sale of food and drink for consumption on the premises - restaurants, snack bars and cafes.
- **A4 Drinking establishments** - Public houses, wine bars or other drinking establishments (but not night clubs) including drinking establishments with expanded food provision.
- **A5 Hot food takeaways** - For the sale of hot food for consumption off the premises

#### Part B

- **B1 Business** - Offices (other than those that fall within A2), research and development of products and processes, light industry appropriate in a residential area.
- **B2 General industrial** - Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste).
- **B8 Storage or distribution** - This class includes open air storage.

#### Part C

- **C1 Hotels** - Hotels, boarding and guest houses where no significant element of care is provided (excludes hostels).
- **C2 Residential institutions** - Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres.
- **C2A Secure Residential Institution** - Use for a provision of secure residential accommodation, including use as a prison, young offenders institution, detention centre, secure training centre, custody centre, short term holding centre, secure hospital, secure local authority accommodation or use as a military barracks.
- **C3 Dwellinghouses** - this class is formed of 3 parts:
  - C3(a) covers use by a single person or a family (a couple whether married or not, a person related to one another with members of the family of one of the couple to be treated as members of the family of the other), an employer and certain domestic employees (such as an au pair, nanny, nurse, governess, servant, chauffeur, gardener, secretary and personal assistant), a carer and the person receiving the care and a foster parent and foster child.
  - C3(b): up to six people living together as a single household and receiving care e.g. supported housing schemes such as those for people with learning disabilities or mental health problems.
  - C3(c) allows for groups of people (up to six) living together as a single household. This allows for those groupings that do not fall within the C4 HMO definition, but which fell within the previous C3 use class, to be provided for

i.e. a small religious community may fall into this section as could a homeowner who is living with a lodger.

- **C4 Houses in multiple occupation** - small shared houses occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities such as a kitchen or bathroom.

## Part D

- **D1 Non-residential institutions** - Clinics, health centres, crèches, day nurseries, day centres, schools, art galleries (other than for sale or hire), museums, libraries, halls, places of worship, church halls, law court. Non-residential education and training centres.
- **D2 Assembly and leisure** - Cinemas, music and concert halls, bingo and dance halls (but not night clubs), swimming baths, skating rinks, gymnasiums or area for indoor or outdoor sports and recreations (except for motor sports, or where firearms are used).

## Sui Generis

- Certain uses do not fall within any use class and are considered 'sui generis'. Such uses include: betting offices/shops, pay day loan shops, theatres, larger houses in multiple occupation, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/or displaying motor vehicles. Retail warehouse clubs, nightclubs, launderettes, taxi businesses and casinos.

## Appendix C

### Glossary

**Comparison Retail/Shopping:** These refer to shopping for things like clothes, products, household and leisure goods which are not bought on a regular basis

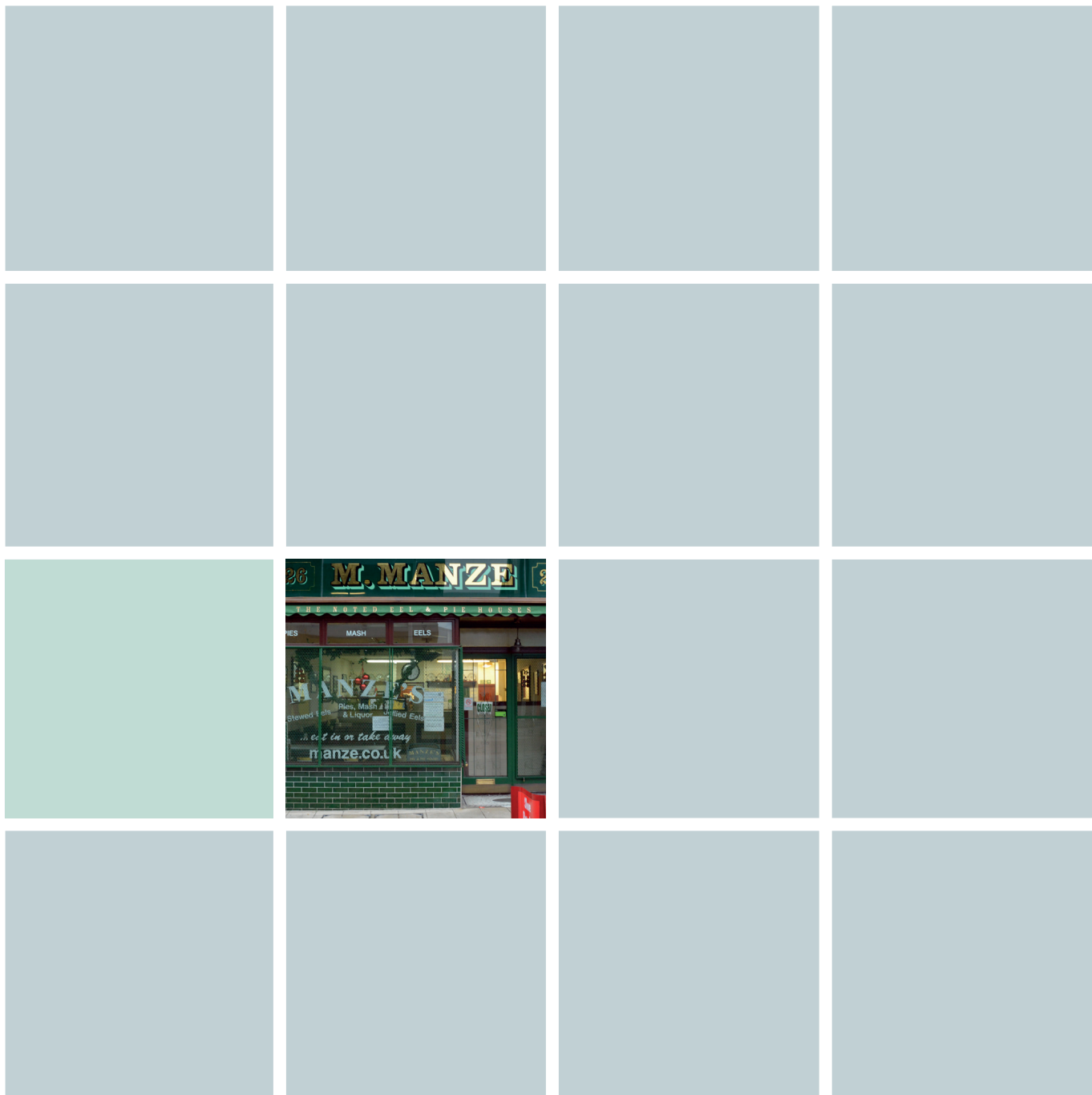
**Convenience Retail/Shopping:** These refer to shopping for everyday, essential items like food, drink, newspapers and confectionary.

**Primary Shopping Frontages:** the retail core of the district centre where development is largely restricted to A1 *Shops* and where pedestrian activity is concentrated. Change of use from retail is discouraged.

**Secondary Shopping Frontages:** have a greater diversity of use. Change of use in these areas is treated more flexibly to allow for diversification although A1 *Shops* use is still highly important.

**Service Retail:** A1 *Shops* units that offer a personal service that can be purchased as their main form of trade e.g. hairdressers; shoe repairs; dry cleaners.





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