

City Commons

Catering Options Appraisal

Prepared for:
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1.0 Introduction

Boyd-Thorpe Associates have been asked to appraise the feasibility of developing café/kiosk operations on three of the City of London Commons, namely: Farthing Down, Ashtead Common and Riddlesdown Common.

As part of this consultancy and to consider the viability of catering operations at these sites Fiona Boyd-Thorpe of Boyd-Thorpe Associates has:

- Visited the three sites;
- Met with the Business Manager for the City Commons, Haydn Robson;
- Met with Head Rangers, Allan Cameron and Andy Thwaites;
- Reviewed available information on visitor numbers, visitor profile and visitor research;
- Carried out some benchmarking to ascertain the level of catering provision in the nearby communities.

Within this short report we comment on the viability of providing catering on each of the Commons, and where appropriate the type of catering provision, the likely level of capital investment, rent and lease terms.

2.0 Data Analysis

Very little up to date information was available on the number and type of visitors to the three commons but we have interpreted that which was available as follows:

2.1 City Commons Visitor Observation Survey 2013

The 'City Commons Visitor Observation Survey 2013' prepared by Alison Milward Associates suggests that the following number of visits are made each year:

Farthing Downs	157,520 visits p.a.
Ashtead Common	205,960 visits p.a.
Riddlesdown	220,530 visits p.a.

There is some further useful information on visitor use at each location:

Farthing Downs

- Farthing Downs is regularly used by large rambling groups.
- Greater densities of visitors are seen at the southern end of the site in the amenity mown areas closest to the car park and interpretation panels.
- 76% of visits are made by people in groups with sitting/relaxing being a popular activity as families/friends enjoy picnics or sunbathing.
- People visit later into the evening at weekends than during the week.

Ashtead Common

- Walking the dog was the most popular activity,
- Cycling was the second most popular activity at 23.6% of visits. This was particularly popular at weekends.
- 75% of visits are to the urban southern and eastern areas of the common closest to the railway station and housing.
- Although Ashtead Common has the second highest number of visits of all seven city commons, because it is such a large site, it has the lowest density of use.
- The rural northern western side of Ashtead Common has more than double the number of visits at weekends than during the week.

Riddlesdown

- This is the most used of the City Commons sites.
- Weekday visits made up 42% of the total and weekend visits 58%. This near even split of visits indicates a steady visitor number.
- There are a high number of under 20's using Riddlesdown as it is used as a through route to local schools.
- 40% of visits to Riddlesdown are made by people with dogs.

Summary

- The profile and activities of visitors match fairly well to the profile of the local population living within 2 hours of the site.
- The data confirms that the sites cater for local people rather than acting as destinations for people from further afield.
- The City Commons are used mainly by local people who enjoy the space for fresh air and exercise with walking, dog walking, running and cycling being the main physical activities.
- The profile and number of visitors do not vary much between the seasons and weekend usage does not differ significantly from weekends except at Ashtead Common/Kenley Common.

2.2 City Common Snapshot Survey

This survey received just 94 respondents so care should be taken when interpreting the data. Furthermore the survey covered all of the City Commons and so it is not possible to pick out information for the three specific commons we are investigating. However, on the understanding that this information provides a general picture we summarise the relevant data below:

Q1 Which City of London site did you visit

Ashtead Common	30.85%
Coulsdon Common	18.09%
Farthing Down	13.83%
Kenley Common	17.02%
Riddlesdown	10.64%
West Wickham Common	8.51%

Spring Park 1.06%

Q3 Approximate arrival time of most recent visit

Early morning (before 9am)	11.39%
Morning (9am-12pm)	35.44%
Afternoon (12-2pm)	17.72%
Late afternoon (2-5pm)	29.11%
Evening (5pm-)	6.33%

Q4 Reason for visit

Dog walking	45%
Walking	52.5%
Peace and quiet	37.5%
Enjoy nature	41.25%
Meeting friends/family	7.5%
Family outing	7.5%
Informal sports	7.5%

Q5 95.25% of respondents said the common was local to them.

Q6 Average visit time

Less than 30 mins	7.5%
30 mins-1hr	50.0%
More than 1hr	42.5%

Q7 How often do you visit the site

Daily	28.75%
Weekly	36.25%
Once/twice a month	25.0%
Once/twice a year	10.0%

Q11 If you could make 1 improvement to the space

Of the 62 responses received, 7 wanted to see a café/coffee/refreshment facility.

Refreshments at Farthing Down/Riddlesdown were specifically mentioned by one respondent.

Q13 97.5% of people are local residents to the space.

Q15 Gender

Male	38.5%
Female	61.5%

Q16 Age

20-44	20.25%
45-64	43.04%
65-over	29.11%

This snapshot survey supports the data from the City Commons Visitor Observation Survey:

2.3 What does this mean for catering?

Interpreting this data we can conclude:

- There is steady use of the spaces across the day and across the days of the week with no significant peaks and troughs (except at Ashted Commons where weekend usage is much higher) providing consistency for a catering operator.
- Visits occur throughout the day but 82% occur during the hours a café/kiosk would be open (9am-5pm).
- Repeat visits are high (65% visit at least once a week with 28.75% visiting daily) so with a good café/kiosk there is an opportunity to build a regular customer base.
- The most common dwell time was 30mins-1 hour with 50% of visits made in this time frame but interestingly 42% of visits last longer than an hour. With visits over one hour there is a good prospect that visitors will wish to incorporate a refreshment break.
- The spaces attract more females than males and more over 45's (72.15%) than under 45's (20.25%). These are groups that will make use of a good refreshment facility if it is appropriately priced.
- Most people are local to the space (97.5%) that they visit so the catering offer needs to be good or people will simply go home for refreshments.
- Walking, dog walking, enjoying nature, peace and quiet are the main activities, i.e. relaxation. This fits well with the concept of enjoying refreshments provided that the café/kiosk operation does not intrude into the peace and quiet of the location. ;

3.0 Site Observations

Farthing Down

This a beautiful site with far reaching views across the valley. The car park provides a focal point and an obvious location for a small café/kiosk/mobile to operate from although there are no buildings suitable for conversion. The site is very exposed and without indoor seating business would probably be limited in all but good weather. It is understood that large groups gather particularly at weekends to picnic so there may be opportunity to sell coffee, ice cream to these groups but perhaps not anything more substantial.

A café previously ran out of the Rangers Cottages but this was many years ago and was not managed by the City.

Ashtead Common

This is a very large site although 75% of visits are reportedly made to the southern and eastern more urban part of the site near to the Estate Office. Due to its scale and the fact that there isn't a single focal point where visitors gather on Ashtead Common the visitors are largely well disbursed.

This area is affluent and the common is surrounded by very large detached houses. The busy railway station is located nearby. The 'village' is a 10 minute walk from the more southerly edges of the common.

The Ashtead Estate Office is oversized and there could be spare capacity for developing a catering outlet within the building but there is no parking on site. A successful café could create considerable traffic and parking issues.

Riddlesdown

Riddlesdown car park is accessed from the end of a residential road from which paths lead out onto the common. This provides an obvious location for a catering outlet being the focal point for many visitors arriving by car. However, visitors also arrive on foot via the many entrances onto Riddlesdown and not all will pass the car park. The car park is spacious but contains no buildings suitable for conversion to a kiosk/cafe. It is understood that a café used to be operated from a small building at the end of the Superintendent's garden. This building is a short walk from the car park but still visible from it. It occupies a relatively sheltered position and offers potential for conversion back to a small café/kiosk. It is currently used as a volunteer base.

4.0 Competitor Survey

Farthing Down

The nearest cafes are Poppy Café and the Full Monty Café – both of which are fairly basic. Jaconelli's espresso bar seems to serve some good coffee and food, but is near a main road and is only open until 1pm or 2pm. There are 8 cafes on Coulson high street near to the rail station. Most are fairly basic, with the best appearing to be Caffè Nero and the Art Café. These are all some distance from the car park at Farthing Down.

South of Farthing Down (Chaldon) is almost entirely residential and quite sparsely populated, almost rural. There is a café in the pavilion at Netherne Village, near to the sports ground, but the offer appears to be limited.

There are quite a large number of cafes and coffee shops in Caterham, but these are considered too far from Farthing Downs to be serious competition.

In summary there is little competition for a café at Farthing Down should one be developed.

Ashtead Common

There are a few cafes on the periphery of the common – St George's Café and Ashtead Café are the closest. Both focus on low priced cooked breakfasts and hot sandwiches. It is understood that a coffee van operates at the station from 6am to 9am daily servicing the commuter market.

The majority of competition in the area is slightly further from the common, on the A24, near to Ashtead Park (approximately ½ km away). There are only a few cafes here, but they are better quality café/deli operations, with good quality lunchtime offers. CoffeeActive and Handley's appear to be the best operations. There are also a small number of neighbourhood restaurants in this area.

Whilst there is some competition in the area it is some distance from the more popular south eastern part of the common.

Riddlesdown

There is no real competition in the area immediately around the common. Slightly to the north there is Marmaris Café and slightly further into Sanderstead there is Priscilla's Tea Room, which is a small but quaint operation on the edge of a park. Southwest of the park is Whyteleaf where there are a few basic cafes but overall the level of competition in the area is particularly low.

5.0 Site Appraisal

Farthing Down

A scheme was developed in 2007 to create a small kiosk within the toilet block at Farthing Down. At that time visitor numbers were not available but there was a push from the Friends of Farthing Down to create a visitor centre and small refreshment facility. This scheme did not proceed but a tender was entered into to identify a kiosk operator to operate a free standing kiosk at the site. An appointment was made but the lease was terminated after a few weeks due to complaints about quality/hygiene.

Several kiosk/mobile operators have been appointed since but each operator has only lasted a few weeks before moving on. This and the fact that the City has not been bothered by opportunist ice cream operators turning up every weekend suggest that the location is not commercially viable. With visitor numbers now known to be only 150,000 p.a. we are of the view that the site is not busy enough to support even a small local business.

There is no nearby housing to attract custom from non-walkers etc. and the majority of visitors would need a car to access a café at the car park.

Ashtead Common

The rangers at Ashtead Common have been approached by a local events company, Four Gables, requesting permission to locate a Citroen HY 1979 vintage food truck on the common at "Bridleway 33" opposite the station. The van would remain in situ at night with clamps and chains and a tracking device to deter criminal activity. The company claim that they have identified a large market in the common for dog walkers and ramblers who would like a rest in the middle of their activities. They suggest that the van would also provide a group meeting point at the entrance to the common. The proposed opening hours are 7am-12pm 6 days a week (closed Monday). Four Gables propose donating 5% of their net profits to the Ashtead Common charity.

We have the following observations:

- Being rather cynical, the location of the van and the opening hours seem best suited to serve the local commuter market utilising the station than the users of Ashtead Common. If this

proposal was agreed longer opening hours would need to be put in place. The City Commons Visitor Observation Survey 2013 suggests that at weekends approximately 50% of visits are made after 2pm.

- A van left overnight could attract criminal activity, vandalism or theft which could create negative PR for the City.
- Power, if not already available, will be very costly to install. Use of a generator will have a negative impact on the environment both in terms of noise pollution and CO₂ pollution.
- The 5% profit is a manipulable figure and so there is no certainty of income to the City. The caterer could make a reasonable living from this location but never actually declare a profit. If the proposal is to be considered further we recommend requesting a full business proposal and charging a fixed annual rent.

The proposal may warrant further investigation but in so doing there needs to be a clear and fixed return to the City.

An alternative proposal may be to consider the conversion of the current Superintendent's office into a takeaway kiosk or the Superintendent's office, reception area, kitchen and toilets into a small café. However, the cost of converting the space, particularly to a café, is not insubstantial. Visitor numbers are relatively low at just over 200,000 so to cover the cost of conversion the kiosk/café would have to attract additional destination custom from elsewhere to make it viable. We have established that there is little competition of good quality in the area but we wonder what the café/kiosk's USP would be. Without a USP (the view from inside is lovely but there is no 'garden', the building is not particularly 'interesting') it is difficult to see why people would come specifically to this location for a café. Commuters using the station in the morning/evening need somewhere very convenient. They are unlikely to go out of their way to the common for a coffee. Lack of parking on site will be a limiting factor for it operating as a café.

Without a wider piece of work to better understand visitor use of the common and interest in a café it is difficult to comment further but our view is that a café operator would probably struggle to payback the cost of conversion to a café or even a kiosk. Furthermore, if it were financial viable and successful such a facility may create car parking and traffic issues which the City may not want.

Riddlesdown

Riddlesdown presents the most interesting opportunity.

Although visitor numbers are not much higher than Ashted Common and certainly much lower than, say, Burnham Beeches, the area is surrounded by residential housing and there is virtually no competition by way of alternative cafes on the nearby streets. The existing building is understood to be in good condition so the cost of creating a café should be relatively low. Its location near to the car park and in a sheltered southerly position with an outdoor seating area makes it ideal. The building, with some internal reconfiguration, should be large enough to accommodate a few internal seats which will ensure it can trade year-round.

We were unable to access the inside of the building and detailed plans of the building are not available but utilising the sketch drawings and internal photographs sent to us we have prepared a suggested layout drawing (Appendix A). With more information a better layout could probably be

achieved. This configuration requires recessing the wall to the current office to open out the service space and create a seating area and a small store. However, this wall could possibly be removed completely to create further seating with the catering storage incorporated into the kitchen and under counters. New floor, wall and ceiling finishes will be required to improve the look and feel of the space.

The café would only be able to serve a limited menu due to space restrictions but it would be sufficient to meet the requirements of the majority of visitors. This might include hot and cold beverages, ice creams, wrapped bought in cakes, pastries, biscuits, confectionery, crisps etc., hot soup, sandwiches/panini/toasties and possibly jacket potatoes.

We are unable to comment on the cost of converting the space since we do not have access to building costs nor do we know the condition of the current building and M+E services but we are confident that a low-cost conversion could be achieved.

Until an agreed layout and the cost of conversion has been identified it is not possible to forecast sales revenue and therefore income to the City but based on other City lease buildings we believe a rent of say £5,000 to £7,500 p.a. could be achieved if the City carry the building works out themselves. If the tenant carries out the work (which may be more cost effective) they will probably require a rent-free period to recover the building and fit-out costs. Further financial modelling can be undertaken once the makeup and cost of the conversion is better understood.

The opportunity is most likely to appeal to a small local person wishing to operate their own business.

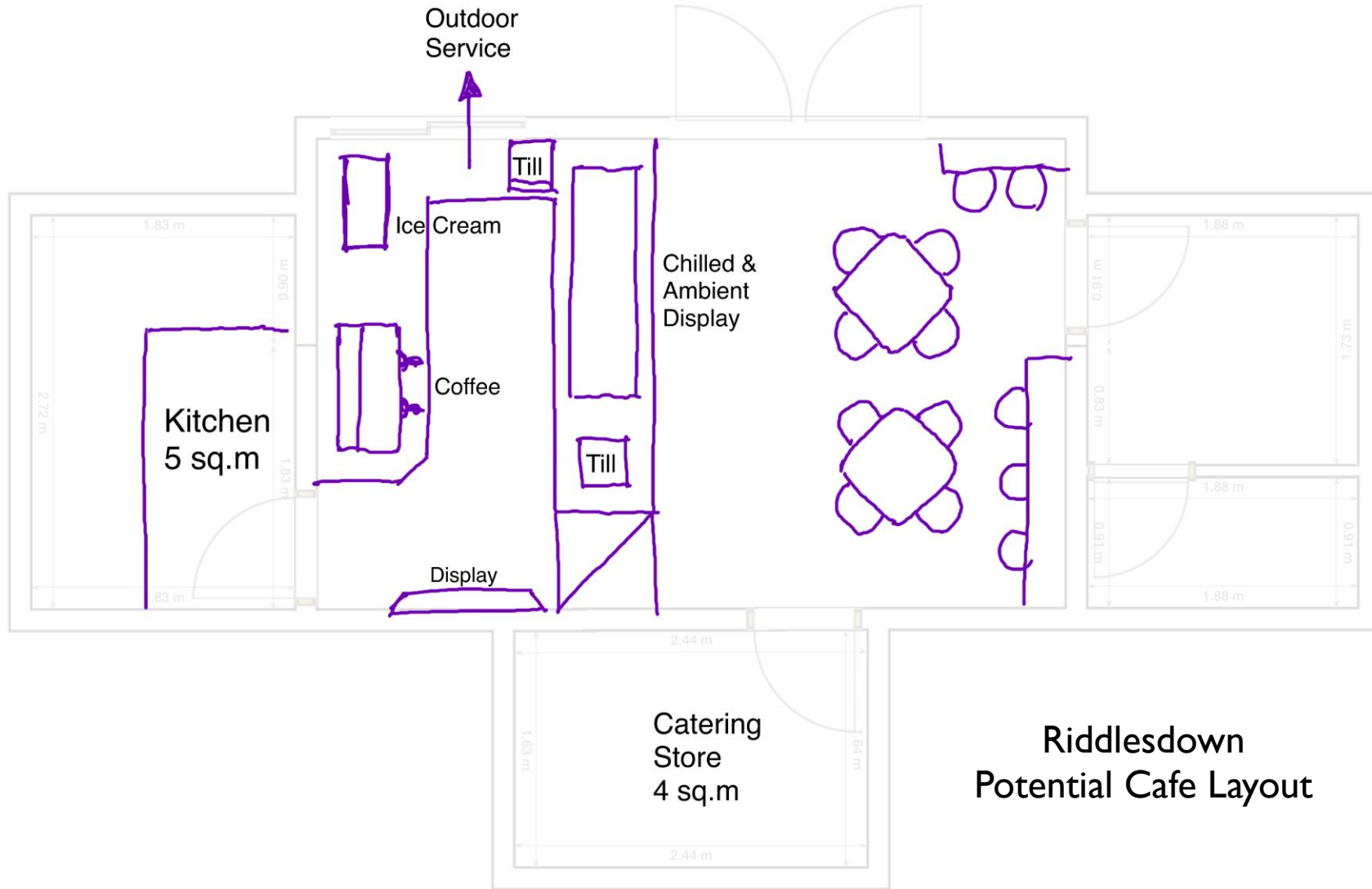
6.0 Recommendations

We do not believe there is a case for catering at Farthing Down due to the low visitor numbers and location.

We do not believe there is a business case for catering at Ashted Common due to the cost of converting the office space. The proposal from Four Gables warrants further investigation but in its current guise it does not offer a guaranteed income to the City and the benefits seem to weigh solely in favour of the operator.

It is strongly recommended that a café at Riddlesdown is investigated further. A short visitor survey should be carried out to establish the level of interest in a café operation in the identified location. If such interest is confirmed it is suggested that the cost for converting the building is obtained, further financial modelling is undertaken and the opportunity is market tested to identify whether there is interest from suitable operators.

Appendix A



Riddlesdown
Potential Cafe Layout