

Richmond upon Thames Retail and Leisure Needs Study Phase 1 Update

London Borough of Richmond upon Thames

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1.0 **Introductions**

Overview

- 1.1 Lichfields has been commissioned by the London Borough of Richmond upon Thames (LBRuT) to prepare an update of the Retail and Leisure Needs Study, previously produced in 2014. The study has been prepared in line with the National Planning Policy Framework (NPPF) relating to the need to ensure the vitality of town centres (paragraph 86) and the evidence to assess the need for economic development (paragraph 81). The update also takes account of the Planning Practice Guidance (PPG). LBRuT is currently preparing a new Local Plan and this strategic Retail and Leisure Study update will inform its preparation.
- 1.2 The project has been split into two phases. This update report sets out the findings of Phase 1. A later Phase 2 report will provide a more detailed quantitative and qualitative assessment of the need for new retail, leisure and other main town centre uses within LBRuT. Phase 2 will be completed in early 2022.

Report structure

- 1.3 Section 2 of this Phase 1 report provides an overview of trends and recent changes that will affect the demand for main town centre uses. The appropriate policy and strategy approach for LBRuT should reflect these underlying trends.
- 1.4 Section 3 examines the existing hierarchy of centres within LBRuT and the surrounding boroughs.
- 1.5 Section 4 sets out an update of the retail and food/beverage floorspace capacity assessment based on the latest available GLA population and Experian expenditure projections.
- 1.6 Section 5 updates the assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses.
- 1.7 Section 6 summarises the main conclusions and the high-level implications.

2.0 Recent trends and key changes

Implications of Brexit, Covid-19 and other trends

- 2.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This past growth fuelled demand for new retail and leisure floorspace. Over the past decade expenditure growth has been much slower and the demand for retail floorspace has reduced. Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to continue to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (2020 and 2021) for retail and leisure now reflect the expected effects of Brexit and the Covid-19 pandemic.
- 2.2 The main implications of Brexit and the Covid-19 crisis for the evidence base are likely to be as follows:
- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
 - short term impacts on the mix of town centre uses and customer behaviour that are likely to distort the base year position; and
 - longer terms structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.
- 2.3 The key uncertainties relating to the first two points are primarily the length of Covid-19 crisis and likely recovery period. The longer-term structural implications are harder to predict and quantify at this early stage, however there are already signs of a bounce back in terms of expenditure growth, as set out below.
- 2.4 In the short term, operators have faced elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit. Short-term supply chain disruption could lead to inflationary pressure, which may have an impact of consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery are benefiting at least in the short-term. There is likely to be a long-term structural shift to multi-channel shopping, reducing the demand for physical space within town centres.
- 2.5 Bearing these trends in mind, following the Covid-19 crisis there is likely to be a spike in town centre vacancies with unfortunately some businesses failing to re-open, particularly non-food retail operators, restaurants and leisure uses. Many national operators have already announced job losses and store closures.
- 2.6 The Covid-19 crisis and Brexit could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this update is to assess the long-term need over the new local plan period within five year interval projections (i.e. base year to 2024, 2029 to 2034, and 2034 to 2039), development plan policy should assume population projections will return to projected levels by 2024. The first interval population projections at 2024, and certainly later years, should not be significantly affected by the Covid-19 crisis. It is not yet possible to understand if the short-term impact will continue into the medium and longer term projections to alter previous trends to any greater extent. At the time of Phase 2 work in 2022, there may be updated population projections and the latest evidence of any impacts can be considered.
- 2.7 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes were over 22% lower at the height of the first Covid-19 lockdown in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted).

However, between the first and second lockdown during July and August 2020, sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February. The reintroduction of Covid-19 restrictions saw a reduction in sales in November 2020, although still 3% above pre-Covid levels. Post second lockdown retail sales figures have been encouraging.

- 2.8 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales during the first lockdown from February to April 2020, whilst the food sector experienced 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February 2020 level during March to November 2020.
- 2.9 ONS data suggested on-line retail sales peaked at over 50% higher in June 2020 compared with February 2020. Figures for July to November 2020 were consistently around 40% higher than the pre-Covid sales in February 2020.
- 2.10 Food store on-line sales doubled during May and June 2020, but this still represented a relatively small proportion of total sales in this sector, reaching about 11%; it remained over 10% during July to November 2020. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April, reaching 44% of sales. On-line sales in this sector were over 50% higher than pre-Covid levels during the lockdowns.
- 2.11 It is difficult to predict the long-term implications for retail sales and the amount of on-line sales, post Covid-19. Nevertheless, ONS information suggests retail sales should recover to previous levels of growth but the proportion of retail sales spent on-line is likely to represent a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing.
- 2.12 Reflecting these likely trends, Experian's latest expenditure projections recommend relatively modest levels of growth when compared with historic trends. These long-term forecasts should be monitored and kept under review.
- 2.13 These on-line shopping national trends are likely to be reflected in LBRuT. The proposed Phase 2 household survey will examine trends in on-line shopping and the expenditure projections can be modified accordingly.

Long-term expenditure trends

- 2.14 Planning based on long terms expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later, if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted bearing in mind the uncertainties relating to the growth in on-line shopping.
- 2.15 For convenience goods, Experian's latest forecasts (October 2020) anticipate limited expenditure growth (0.1% per annum after 2026) and most of this slow growth will relate to non-store sales. Any need for new convenience goods retail floorspace in LBRuT is likely to relate to population growth or qualitative areas of deficiency.
- 2.16 For comparison goods, higher levels of expenditure growth are expected in the future (between 2.9% to 3% per annum), still at a lower rate than previous pre-recession trends (8% per annum

between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

- 2.17 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 18 (October 2020) states:

"After easing in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting around 30% in 2027. The pace of e-commerce is anticipated to moderate over the longer term, reaching 35% of total retail sales by 2040."

- 2.18 The floorspace capacity projections in this update make an allowance for future growth in e-tailing based on Experian's recommended post Brexit and Covid-19 projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure. An allowance is also made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

Demand for town centre floorspace

- 2.19 Lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the past decades. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased to 12.4% in 2020. It seems likely there will be a sharp increase in shop vacancies in many town centres, as and when the impacts of the Covid-19 pandemic are fully felt.
- 2.20 The number of vacant shop units within LBRuT main and local centres was 222 in mid-2020. The average shop vacancy rate in all centres in LBRuT was 10.3%, marginally lower than the UK pre-Covid-19 average (12.4%). The 2014 Retail Study recorded 167 vacant units, which suggests the number of vacant units has increase by 55 since 2014.
- 2.21 The national decline in the number of comparison goods retail outlets within centres has been evident in LBRuT's main centres. The Council's latest 2020 land use survey suggests the number of comparison goods shops is 620 outlets, less than 29% of all shop units. The number of food/beverage and non-retail service uses was 1,084 outlets, over 50% of all shop units. In most centres non-retail services have replaced lost comparison goods outlets.
- 2.22 Property owners, landlords and fund managers have also come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e. an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all of its debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/ leisure assets. These trends are likely to be exacerbated by the coronavirus pandemic, at least in the short-term.
- 2.23 Whilst the CVA process has created headaches for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

Food store operators

- 2.24 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).
- 2.25 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased rapidly by 76% between 2011 and 2016.
- 2.26 Several proposed larger food superstores were not been implemented across the country. There has been a move away from larger stores to smaller formats, reflecting changes in customers' shopping habits i.e. more frequent but smaller food and grocery shopping trips.
- 2.27 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. These operators are now competing more directly for market share with other main food store operators. LBRuT has two Lidl stores but the growth of this discount sector has been lower than in other London Boroughs perhaps due to the absence of suitable sites.

Comparison retailers

- 2.28 Comparison retailers have also responded to difficult market conditions. The bulky goods warehouse sector has rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers have sought large out-of-centre stores, for example Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends have slowed significantly and are unlikely to re-emerge for the foreseeable future.
- 2.29 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This trend can lead to the relocation of retailers creating more vacant units in town centres. The discount sector has occupied many units on retail parks e.g. Home Bargains and B&M Bargains. In London there have been many proposals to redevelop low density retail warehouse sites for higher density mixed use developments. The retail warehouse sector is represented in LBRuT with a concentration of stores at Kew Retail Park. Ivybridge Retail Park in Isleworth is accessible from LBRuT but there is a limited provision of bulky goods comparison outlets.
- 2.30 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in LBRuT (excluding Richmond town centre) with a limited number of comparison goods national multiples present. Large DIY stores including at Homebase, East Sheen (the Mayor has granted permission subject to the conclusion of a Section 106 legal agreement and final decision notice) and nearby, Wandsworth has recently been subject to redevelopment proposals.
- 2.31 In general, operator demand for space has decreased since the last recession and, of those national multiples looking for space, many prefer to locate in larger centres i.e. Richmond and Kingston town centres. Other centres in LBRuT are at a lower level in the hierarchy and multiple operator demand may be much less in these centres in the future. Much of the occupier demand

in many smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres is likely to continue in the future, with many retailers reducing their overall number of outlets.

- 2.32 The continuation of these trends will influence future operator space requirements in LBRuT with smaller vacant units and lower tier centres becoming less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in the main centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

Charity and discount shops

- 2.33 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in LBRuT with a strong presence of charity shops in most centres. There are 50 charity shops within the Borough, 8% of all comparison shops.
- 2.34 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary retail frontages.

Non-retail services

- 2.35 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:
- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as takeaways), funeral parlours and post offices;
 - banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
 - restaurants, cafés and hot food takeaways; and
 - pubs/bars.
- 2.36 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights to control the growth of these uses in town centres. This trend has not been particularly evident in LBRuT with a relatively low proportion of betting shops, lending/pay day loan and takeaways when compared with the national average.
- 2.37 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date these measures have not significantly changed the composition of most town centres.

The evening economy

- 2.38 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

2.39 Recently some restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand has continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly. This sector in town centres has been the most adversely affected by the Covid-19 crisis and the potential for growth in the short-term is uncertain.

2.40 The key categories for food and beverage offer are:

- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
- *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

2.41 The proportion of non-retail uses within town centres across the country has increased significantly. This trend has been experienced in LBRuT, but a short-term reduction seems likely following the Covid-19 crisis.

Pop-up spaces

2.42 The increase in vacant space across the country has led to an increase in premises available for temporary uses or pop-up uses including temporary restaurants, bars, shops and galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations in order to test and learn before committing to permanent stores. This trend may increase following the Covid-19 crisis.

National policy and other changes

2.43 The revised NPPF was replaced by an amended version in February 2019. The revised NPPF indicates planning policies should (para. 86):

- 1 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;
- 2 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;
- 3 retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- 4 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;
- 5 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
 - 6 recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.
- 2.44 The rapid changes that are affecting the retail sector and town centres are acknowledged and reflected in the revised NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.
- 2.45 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. The Covid-19 crisis has elevated this debate. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.
- 2.46 On 1 September 2020, the UCO was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail. Temporary changes to permitted changes of use up to at least July 2021 will provide further flexibility.
- 2.47 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:
- Class E (Commercial, business and service);
 - Class F.1 (Learning and non-residential institutions); and
 - Class F.2 (Local community).
- 2.48 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses' within the NPPF e.g. medical services and some light industrial uses.
- 2.49 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.
- 2.50 Other potential 'bad neighbour' town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling potential 'bad neighbour' uses such as pub/bars and takeaways, whilst protecting

against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.

- 2.51 The previous distinction between Class A3, A4 and A5 uses has become more critical, with Class A3 uses now having more flexibility in the new Class E, but more limited flexibility for Class A4 and A5 uses. Many Class A3 restaurants have offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, LBRuT's land use survey has re-categorised existing uses within town centres to reflect the new UCO, which is helpful when considering appropriate policy options.
- 2.52 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential test policies.
- 2.53 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were recently published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021.
- 2.54 A new Class MA business and commercial to residential permitted development right has introduced certain commercial to residential permitted development rights. The new class MA is different to previous retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.
- 2.55 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. These PD rights are subject to floorspace, vacancy and location limitations.
- 2.56 Class MA allows many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.
- 2.57 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites, National Parks and Areas of Outstanding National Beauty will be excluded from the new PD right. The legislation requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the current Class M PD right will fall away.
- 2.58 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor

sports), other than use as an indoor swimming pool or skating rink, will benefit from the Class MA PD rights.

- 2.59 The permitted development right does not apply if more than 1,500 sq.m of cumulative floorspace is to be converted. This is significantly more than the 150 sqm permitted under Class M retail to residential at present, but a significant new restriction for office to residential change of use via permitted development. Most retail units within town centres are below this threshold and converting only part of a building is permitted.
- 2.60 To benefit from Class MA, the use of the building must have fallen within Class E or one or more of the uses that it replaced for at least two years continuously prior to the date the prior approval application is made. The building must have been vacant for a continuous period of at least 3 months immediately prior to the date of the application for prior approval, but periods of closure as a result of Government Covid-19 restrictions will not count towards the vacancy period where the building continues to be occupied by the owner or tenant. A key change arising from Class MA will be the loss of a prior approval matter considering the impact of the loss of retail.
- 2.61 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.
- 2.62 The requirement to meet residential space standards will come into force. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard.
- 2.63 The Council has made a non-immediate Article 4 Direction, which covers 67 areas (including the town and local centres and most local parades) and if confirmed by the Secretary of State this will come into force on 31st July 2022. These measures have been made due to concerns about the potential impact of these changes outlined above on the Borough's high streets and shopping parades, which are essential to support local communities. The effect of the Direction means that a change of use from a town centre use to residential in these locations will require planning permission and will be assessed against Local Plan planning policies.

Summary

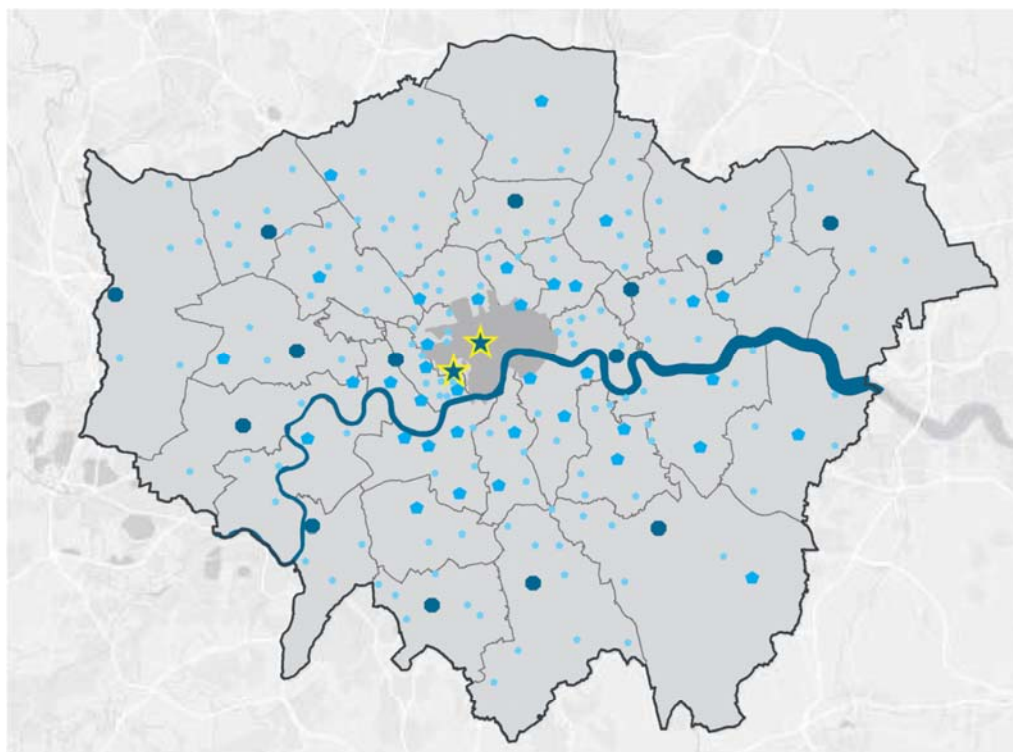
- 2.64 The trends and changes highlighted in this section, including the growth of home shopping are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.
- 2.65 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate increased to over 14% during the last recession but has not returned to pre-recession levels (around 8%). The national vacancy rate remains over 12% and is expected to increase following the Covid-19 crisis, and therefore a cautious approach to future growth is required.
- 2.66 Shopping behaviour will continue to change, and the high street must respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience for those looking for a "day out" or "evening out".

3.0 Hierarchy of centres






The London Plan hierarchy

3.1 The London Plan (2021) sets out the London wide hierarchy of main centres down to District Centre level, as shown below in Figure 3.1. International Centres are in Central London. Westfield at Shepherds Bush is expected to become a new International Centre. The outer London suburbs in West and South West London are served by Metropolitan Centres i.e. Croydon, Ealing, Hounslow and Kingston. Richmond town centre is the highest tiered centre in LBRuT. Richmond along with Chiswick, Putney, Wandsworth and Wimbledon are third-tier Major Centres, below Metropolitan centres in Ealing, Hounslow and Kingston-upon Thames. LBRuT has four District Centres at East Sheen, Teddington, Twickenham and Whitton.

Figure 3.1 London's town centre network



Town Centre Network

-  International
-  Metropolitan
-  Major
-  District
-  CAZ

Source: GLA London Plan (2021)

3.2 The London Plan indicates Metropolitan Centres serve wide catchment areas covering several boroughs, whilst Major Centres including Richmond only have a borough wide catchment area. District Centres are smaller between 5,000 to 50,000 sq.m of retail, leisure and service

floorspace space. Local and neighbourhood centres are not identified in the London Plan and are expected to serve localised catchment areas. The scale and mix of uses within the sub-region based on data from the GLA's 2017 London Town Centres Health Checks is shown in Table 3.1.

3.3

This data demonstrates that GLA International and Metropolitan Centres have over 100,000 sq.m of retail/service floorspace. Major Centres range from around 30,000 to 50,000 sq.m, and Richmond town centre is within this range. District Centres are below 30,000 sq.m and vary significantly in size.

Table 3.1 GLA London main town centres in the Richmond sub-region

Centre	London Plan classification	No. retail and service outlets	Comparison goods floorspace sq.m gross	Convenience goods floorspace sq.m gross	Service floorspace sq.m gross	Total floorspace sq.m gross
West End	International	1,289	445,847	15,874	12,735	474,456
Knightsbridge	International	169	134,832	1,600	2,200	138,632
Croydon	Metropolitan	385	157,155	13,850	9,800	180,805
Kingston	Metropolitan	328	134,080	9,890	5,180	149,150
Ealing	Metropolitan	303	56,587	22,780	9,310	88,677
Westfield London	Unclassified	282	112,657	3,610	1,420	117,687
Hounslow	Metropolitan	180	50,722	17,170	3,330	71,222
Kings Road (East)	Major	179	47,986	3,840	1,480	53,306
Wimbledon	Major	161	37,508	11,380	4,370	53,258
Kensington High St.	Major	189	38,226	6,530	4,900	49,656
Richmond*	Major	215	31,727	7,950	4,640	44,317
Wandsworth	Major	102	24,679	13,070	3,280	41,029
Clapham Junction	Major	169	22,535	11,220	4,470	38,225
Tooting	Major	174	18,547	16,040	3,370	37,957
Putney	Major	177	22,066	8,530	5,430	36,026
Hammersmith	Major	122	23,673	5,020	2,830	31,523
Fulham	Major	167	11,701	12,410	3,940	28,051
Twickenham*	District	154	11,982	5,970	5,550	23,052
East Sheen*	District	139	14,660	3,470	4,930	23,060
Teddington*	District	110	8,810	4,820	3,340	16,970
Balham	District	89	7,510	6,730	3,660	17,900
Whitton*	District	71	3,260	2,690	1,610	7,560
Brentford	District	30	980	4,150	2,400	7,530
Earlsfield	District	42	1,330	940	1,180	3,450

Source: GLA 2017 London Town Centres Health Check data.

* note data relates to smaller Goad Plan area rather than Local Plan designated centre boundaries.

Designated Centres in LBRuT

3.4

Designated centres in the Borough are summarised in Table 3.2, based on the Council's latest land use survey in 2020. This information indicates that District Centres have over 120 retail and service units and have a good mix of facilities. Local Centres are smaller (40 to 120 units) and have a more limited range and choice of comparison goods shopping. Neighbourhood centres have between 20 to 40 units, whilst Local Parades have between 5 to 30 units.

Table 3.2 LBRuT's designated centres – Number of outlets by use

Centre	Total retail service units	Comparison goods retail	Convenience goods retail	Food/ beverage	Non-retail services	Vacant units
Major centres						
Richmond	337	120	27	80	83	27
District centres						
Twickenham	272	73	29	65	82	23
East Sheen	260	93	28	43	71	25
Teddington	171	56	17	41	47	10
Whitton	122	38	16	31	31	6
Local centres						
Barnes	116	39	16	21	29	11
Hampton Hill	96	23	9	21	30	13
Hampstead Village	67	16	9	13	27	2
East Twickenham	65	24	4	12	20	5
St Margaret's	60	15	8	15	19	3
Kew Gardens	43	11	6	14	10	2
Ham Common	39	10	7	7	14	1
Neighbourhood centres						
White Hart Lane	45	11	5	10	16	3
Hampton Wick	41	8	3	11	15	4
Stanley Road	37	15	3	8	10	1
Sheen Road	35	12	4	7	10	2
Heathside	31	6	8	6	6	5
Castelnau	22	2	6	5	9	0
Friars Stile Road	21	5	3	6	5	0
Kingston Road	17	6	3	5	2	1
Local parades						
Twickenham Green	34	5	4	11	12	2
Kew Road	30	6	2	14	7	1
Sandycombe Road	29	7	2	8	9	3
Kew Green	17	5	2	5	4	1
Ham Street/Back Lane	16	2	3	4	3	4
Lower Mortlake Road	14	6	1	2	2	3
Waldegrave Road	12	2	2	5	3	0
Whitton Road	12	1	5	3	1	2
Hampton Road	11	1	2	1	5	2
Fulwell	11	1	3	4	2	1
Strawberry Hill	11	1	3	2	5	0
Nelson Road	10	0	2	3	4	1
Crown Road	9	1	1	0	6	1
St Margaret's Road	9	1	2	4	0	2
Ashburnham Road	8	1	4	1	0	2
Hampton Nursery Lands	8	1	2	1	3	1
Hospital Bridge Road	5	2	2	1	0	0

Source: LBRuT land uses survey 2020.

- 3.5 There may be a degree of overlap in the size and role of centres and some anomalies, particularly affecting the smaller centres. However, the Council's established hierarchy reflects a number of factors, including the centre's size and contribution to meeting local needs; location, function and diversity of use (including growth/decline in types of uses); transport accessibility; and whether the centre could be developed to fill a gap in retail provision. In addition, the Council's 2020 land use survey is a snapshot and the Covid-19 restrictions may have affected its reliability. Given this is clearly a time of change, and the increased importance of local shops and services during the pandemic, this has given rise to the Council's support for the 20 minute neighbourhood concept of "living locally". The Council does not propose to make changes to the

categorisation of designated centres, but future Land Use Surveys and the Phase 2 work in 2022 may provide further updates to inform how designated centres are performing.

Relative attraction of centres

3.6 The Javelin Group's Venuescore ranks over 3,500 retail destinations in the UK including town centres, malls, retail warehouse parks and factory outlet centres across the country. Each destination is given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer is weighted depending on their overall impact on shopping patterns, e.g. a department store will achieve a high score. The results for the town centre destinations and other relevant centres outside the study area are shown in Table 3.3.

3.7 Each shopping destination is given a weighted score for multiple retailers present. The score attached to each retailer is weighted depending on their overall impact on shopping patterns. The Venuescore usually correlates to the actual market size of the shopping destination in terms of consumer expenditure, but some larger shopping centres such as Westfield have fewer but larger stores and town centres with a higher proportion of independent stores can generate spending levels in excess of their relative Venuescore. Javelin also assesses the market position of the larger town centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury (i.e. lower, middle to upscale).

Table 3.3 Javelin's Venuescore UK shopping Index

Centre	UK Rank 2017	Venuescore 2017	Market position
London, West End	1	1,625	upper middle
Kingston-upon-Thames	18	382	upper middle
Croydon	23	328	middle
Westfield, Shepherds Bush	23	328	upscale
Knightsbridge	41	279	upscale
Kings Road	72	201	upscale
Richmond	97	184	upscale
Wimbledon	121	171	upper middle
Hammersmith	129	167	middle
Kensington High Street	133	165	upper middle
Putney	143	156	upper middle
Wandsworth Town	169	139	middle
Chiswick	174	137	upper middle
Hounslow	181	133	lower middle
Tooting	292	91	middle
Feltham	343	80	lower middle
Balham	343	80	middle
Twickenham	363	77	middle
East Sheen	754	41	upper middle
Teddington	879	36	upper middle
Merton	1074	30	middle
Whitton	1276	25	lower middle
Barnes	1481	21	upper middle
Brentford	1775	17	middle
Roehampton	2171	14	middle
Hampton Hill	3133	10	lower middle

Source: Javelin Group 2017

- 3.8 This Javelin information is used in the retail industry to assess the relative strength of shopping destinations. Javelin also assesses the market position of centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury or down-market to aspirational (i.e. lower, middle to upscale), also shown in Table 3.3. The market position relates specifically to the fashion offer together with others easily classified operators, because the range and choice of clothing and fashion shopping is the key driver in the relative attraction of large comparison shopping destinations. The Venuescore data is weighted towards clothing and fashion retailing. Clothing/fashion shopping facilities are primarily focused in the larger centres.
- 3.9 Consistent with the London Plan, the Javelin index ranks Richmond as the main centre within the Borough. Other centres in LBRuT feature much lower in the rankings and achieve relatively low scores. Central London, Kingston, Croydon and Westfield are ranked at the top of the hierarchy. Other GLA Major Centres including Richmond, Kings Road, Kensington High Street, Wimbledon and Wandsworth and are all ranked within the top 200, their scores reflect the higher number of national multiple retailers.
- 3.10 The top ranked centres also have the higher market positions, with a focus on luxury rather than discount products. Richmond is considered to have an upscale market position, along with Westfields and Kings Road. Barnes, East Sheen and Teddington are considered upper middle market by Javelin, whilst Twickenham middle market.
- 3.11 Overall, the Javelin analysis suggests centres within LBRuT have a good choice of clothes/fashion shops, including independent shops and multiples.

4.0 **Retail and food/beverage need assessment**

Introduction

4.1 This section updates the quantitative and qualitative need for retail uses within LBRuT. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

4.2 This section sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home).

Assumptions and base data

4.3 All monetary values expressed in this study are at 2019 prices, consistent with Experian's base year expenditure figures for 2019, which are based on actual recorded expenditure levels rather than projections.

Study area zones and population

4.4 A household telephone survey was undertaken in order to quantify existing shopping and leisure patterns in 2014. The Borough was sub-divided into 7 zones as shown in Appendix 1, based on ward boundaries, reflecting the primary catchment areas of the main destinations within LBRuT.

4.5 The projected population within each zone between 2021 to 2039 is set out in Table 1 in Appendix 2, based on GLA 2018-base projections for wards (housing trajectory projections). The base year 2021 population within LBRuT is 199,630. This population is projected to increase to 205,200 by 2039, an increase of about 2.8%.

Retail Expenditure

4.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2019 have been obtained.

4.7 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 18 - October 2020) has been used to forecast expenditure within LBRuT. Experian's short term EBS growth forecast rates during 2020, 2021 and 2022 reflect current economic circumstances, including the current Covid-19 crisis. The forecast changes during this period are as follows:

- convenience goods: +4.2%;
- comparison goods: +1.2%;
- leisure: -12.6%.

4.8 These short-term forecasts, particularly for comparison goods and leisure, are relatively cautious. In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted, as follows:

- convenience goods: 0% per annum growth for 2023 to 2027 and +0.1% per annum after 2027;

- comparison goods: +3.0% per annum growth for 2023 to 2027 and +2.9% per annum after 2027; and
- leisure: +2.9% per annum growth for 2023 to 2027 and +0.9% per annum after 2027.

4.9 These growth figures relate to real growth and exclude inflation.

4.10 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2018 were:

- 3.8% of convenience goods expenditure; and
- 16.8% of comparison goods expenditure.

4.11 Experian's projections suggest that these percentages will increase to 5.7% and 23.2% by 2023 respectively. The long-term Experian projections suggest an increase to 7.3% and 28.6% by 2039 respectively.

4.12 As indicated in Section 2, it is not yet possible to understand if the short-term impact of the Covid crisis will continue into the medium and longer term projections to alter previous trends to any greater extent. At the time of Phase 2 work in 2022 there may be updated projections and the latest evidence of any impacts can be further considered.

4.13 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2038, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 2 and food/beverage expenditure is shown in Table 2 in Appendix 3.

4.14 Based on growth in population and per capita spending, total convenience goods spending within LBRuT is forecast to increase by +2.1% from £520.9 million in 2021 to £532 million in 2039, as shown in Table 3 (Appendix 2).

4.15 Comparison goods spending is forecast to increase by +59% between 2021 and 2039, increasing from £804 million in 2021 to £1,280 million in 2039, as shown in Table 3 (Appendix 3).

4.16 Food and beverage spending is forecast to increase by +52% between 2019 and 2038, increasing from £357 million in 2021 to £542 million in 2039, as shown in Table 3 (Appendix 4).

Growth in turnover densities

4.17 Experian's Retail Planner Briefing Note 18, October 2020 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +4.5% in 2022, and further growth is envisaged in the medium term (+3.0% per annum during 2023 and 2027), and longer term (+2.6% per annum beyond 2027). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide. For convenience goods retail, Experian indicates a decline in sales densities during 2021 and 2022 and no predicted growth in sales densities thereafter.

4.18 Experian does not provide projections for food and beverage sales densities. Experian's projections suggest average food/beverage per person will be 23.9% lower in 2021 than in 2019, due to the effects of the Covid-19 crisis. Existing food/beverage facilities are expected to recover this lost expenditure and therefore a 31.4% growth in turnover is adopted between 2021 and 2024. An average growth rate of 1% per annum has been adopted thereafter.

Base year market shares

- 4.19 The turnover of facilities within LBRuT is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates were estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in March 2014. The household survey results suggested high levels (over 80%) of expenditure retention throughout the Borough for convenience goods shopping and food/beverage. The retention of comparison goods expenditure was much lower (ranging from 21% to 62%) due to the draw of larger centres outside the Borough, primarily Kingston upon Thames. The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 2 and Table 4 in Appendix 3 respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 4.

Capacity for convenience goods retail floorspace

- 4.20 Based on the market shares suggested by the 2014 household survey, available convenience goods expenditure attracted to LBRuT at 2021 is shown in Table 4 in Appendix 2. This has been projected forward to 2024, 2029, 2034 and 2039, and is summarised in Table 11 in Appendix 2. Convenience goods expenditure available to facilities within LBRuT is expected to increase from £478.58 million in 2021 to over £489 million in 2038. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). A breakdown for the main centres is set out in Table 4.1.

Table 4.1 Convenience goods base year turnover at 2021

	Turnover £M
Richmond	127.82
Twickenham	61.11
Teddington	48.12
Whitton	29.06
East Sheen	57.04
Other LBRuT	155.42
Total	478.57

Source: Table 10 in Appendix 2.

- 4.21 Table 11 in Appendix 2 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future. There is a projected convenience goods expenditure deficit of -£5.07 million at 2024 due to the increase in home shopping (SFT), as shown in Table 10 in Appendix 2. This expenditure deficit is projected to reduce to -£3.67 million at 2029. Continued population growth creates a small surplus of +£0.36 million by 2034, increasing to +£10.47 million by 2039. These projections suggest there is limited convenience goods retail capacity for the foreseeable future and there is likely to be a small over-supply of convenience goods retail floorspace in the short to medium term.
- 4.22 The deficit/surplus expenditure projections are converted into floorspace estimates Table 11 in Appendix 2 based on an average sales density of £12,000 per sq.m net, which is an approximate average for the main food store operators. The results are summarised in Table 4.2.
- 4.23 The deficit expenditure projections up to 2029 indicates an over-supply of convenience goods floorspace in LBRuT of -437 sq.m gross at 2029, but long-term growth suggests an under-supply at 2039 of 1,247 sq.m gross.

Table 4.2 Convenience goods floorspace capacity (sq.m gross) - cumulative

Area	2024	2029	2034	2039
Richmond	-246	-163	55	388
Twickenham	-68	-65	-32	131
Teddington	-36	-23	-16	100
Whitton	-25	11	29	103
East Sheen	-88	-4	95	243
Other LBRuT	-215	-192	-87	281
Total	-679	-437	43	1,247

Source: Table 11, Appendix 2.

- 4.24 The Richmond Retail Study 2014 predicted capacity for 6,315 sq.m gross of convenience goods retail floorspace up to 2029. The updated and rolled forward floorspace projection is lower due to lower population and expenditure growth and a higher proportion of home shopping expenditure.
- 4.25 Collectively main and local centres and parades within LBRuT have 250 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. Residents across the LBRuT have good access to a range and choice of food stores and there are no obvious areas of deficiency in food store provision.
- 4.26 Main shopping trips are generally made once a week or less often. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of shopping trip. There are two Sainsbury's superstores (over 2,500 sq.m net) in LBRuT at Uxbridge Road, Hampton Hill and Lower Richmond Road. Tesco Extra at Isleworth is just outside the borough, but also serves the Twickenham and St Margaret's areas.
- 4.27 In addition to these superstores, there is good choice of other large stores/supermarkets and smaller convenience stores within LBRuT. There are 7 large food stores (1,000 to 2,000 sq.m net) including 3 Waitrose stores. The discount food sector is represented by Lidl stores at East Moseley and Twickenham. There are 13 Tesco stores (2 Metro and 11 Tesco Express stores), 9 Sainsbury's Local and 7 Marks & Spencer Simply Food/food halls.
- 4.28 There no obvious areas of deficiency in food store provision in LBRuT.

Capacity for comparison goods floorspace

- 4.29 Available comparison goods expenditure has been projected to 2024, 2029, 2034 and 2039 and is summarised in Table 10 in Appendix 3. Comparison goods expenditure available to facilities in LBRuT is expected to increase from £443 million to over £708 million by 2039.
- 4.30 Table 10 in Appendix 3 subtracts the turnover of existing floorspace (including an allowance for growth in turnover densities) and the closure and redevelopment of House of Fraser in Richmond. The projections suggest future growth in available expenditure will be offset by expected growth in turnover densities up to and beyond 2039 i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

- 4.32 By 2024 there is a projected expenditure deficit of -£24.34 million, which will increase to -£37.35 million by 2029 but this will remain stable until 2034 (-£38.7 million). These projections suggest growth in turnover densities will absorb expenditure growth and there is likely to be an over-supply of comparison goods retail floorspace for the foreseeable future. The deficit expenditure projections have been converted into floorspace estimates Table 11 in Appendix 3. The results are summarised in Table 4.3.

Table 4.3 Comparison goods floorspace capacity (sq.m gross) - cumulative

Area	2024	2029	2034	2039
Richmond	-1,594	-2,075	-1,895	-1,342
Twickenham	-412	-626	-623	-383
Teddington	-200	-310	-322	-209
Whitton	-80	-109	-108	-61
East Sheen	-280	-316	-241	-81
Other LBRuT	-570	-748	-625	-319
Total	-3,137	-4,184	-3,813	-2,396

Source: Table 11, Appendix 3.

- 4.33 The Richmond Retail Study 2014 predicted capacity for 18,899 sq.m gross of comparison goods retail floorspace up to 2029. The main reasons for this significant difference are Experian's lower expenditure projections (including higher deductions for on-line shopping) and higher growth in turnover densities, resulting in less available expenditure for new floorspace.
- 4.34 Collectively main and local centres and parades within LBRuT have 626 comparison goods outlets including national retailers and independent shops. Shopping destinations within LBRuT provide a good range and choice of comparison shops. Richmond is the largest centre in terms of comparison goods floorspace and national multiples, but the Borough is also served by Kingston-upon-Thames a designated Metropolitan Centre. The four District Centre also have a reasonable provision of comparison goods outlets. The other centres have a more limited comparison goods offer.
- 4.35 Overall, the accessibility for residents in LBRuT to a range and choice of comparison goods shopping destinations is good, although the bulky good retail warehouse sector has diminished.

Capacity for food/beverage floorspace

- 4.36 Available food and beverage expenditure has been projected forward to 2024, 2029, 2034 and 2039, and is summarised in Table 10 in Appendix 4. The amount of expenditure attracted to LBRuT is expected to increase from £410 million in 2021 to over £621 million in 2039. Table 10 in Appendix 3 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. At 2024 there is a relatively large expenditure deficit of -£44.25 million due to the recovery of existing turnover to pre-Covid levels in 2019. However, continued population and expenditure growth creates an expenditure surplus of +£1.19 million at 2029 increasing to +£16.96 million by 2034 and +£40.56 million by 2039. Floorspace capacity projections are shown in Table 11 in Appendix 4 and summarised in Table 4.4 below.

Table 4.4 Food/beverage floorspace capacity (sq.m gross) - cumulative

Area	2024	2029	2034	2039
Richmond	-3,266	-217	891	2,411
Twickenham	-1,037	31	337	868
Teddington	-1,124	56	363	919
Whitton	-209	26	88	192
East Sheen	-540	141	395	677
Other LBRuT	-1,089	153	575	1,113
Total	-7,265	191	2,649	6,180

Source: Table 11, Appendix 3.

4.37

The Richmond Retail Study 2014 predicted capacity for 9,118 sq.m gross of food/beverage floorspace up to 2029, which is higher than the updated projection for 2039. The main reason for this significant difference is Experian's lower expenditure projections.

5.0 **Leisure, entertainment and cultural uses**

Introduction

5.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, excludes less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study. The demand for office uses (now included in the new Use Class E) needs to be assessed in the context of the wider need for Class B employment uses.

5.2 Residents in LBRuT have a relatively good range of commercial leisure and entertainment uses within the authority area and within neighbouring boroughs and Central London.

Leisure and cultural expenditure

5.3 Experian local expenditure data for LBRuT indicates the resident population generated £124.69 million in 2019 (an average of about £630 person) on selected cultural, recreational and sporting services, broken down as follows:

- cinema admissions £10.75 million;
- live entertainment i.e. theatre/concerts/shows £29.08 million;
- museums, theme parks, houses and gardens £11.48 million;
- admissions to clubs, dances, discos, bingo £5.00 million;
- other miscellaneous entertainment £6.47 million;
- subscriptions to sports and social clubs £30.21 million; and
- leisure class fees £31.70 million.

5.4 Not all leisure/cultural spend from residents will be spent in LBRuT. Taking account shopping and food beverage expenditure retention rates, it is reasonable to assume LBRUT can retain at least 70% of resident's total leisure expenditure within the Borough. Based on this estimated 70% market share, retained leisure expenditure at 2019 is about £87 million. This retention rate will be calculated based on new household survey results in Phase 2.

Leisure/cultural floorspace capacity

5.5 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by +7.3% between 2019 to 2034 and by +12.2% between 2019 to 2039, which will generate an additional +£9.1 million for these activities from the resident population by 2034 or £15.2 million by 2039.

5.6 With population growth (+1.8% by 2034 or +3.6% by 2039) retained expenditure (70%) on these leisure/cultural activities should increase from about £87 million in 2019 to £95 million by 2034 and then £101 million by 2039, an additional £8 million by 2034 or £14 million by 2039 (+16.2%).

5.7 Based on Lichfields experience, leisure floorspace normally trades on average around £2,000 per sq.m gross. If leisure/cultural expenditure attracted to LBRuT increased by £8 million and then £14 million, as indicated above, then this additional expenditure could support about 4,000 sq.m gross of new commercial leisure and cultural floorspace by 2039, based on an assigned average of £2,000 per sq.m, increasing to 7,000 sq.m gross by 2039.

- 5.8 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

- 5.9 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate is about 2.6 trips per person per annum. The number of trips during the on-going Covid-19 crisis will have reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future.
- 5.10 The Cinema Advertising Association identifies 771 cinema facilities with 4,115 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 40,000 cinema trips per screen per annum or 220 trips per seat per annum.
- 5.11 Cinema provision in LBRuT is 10 screens with 1,351 seats, as follows:
- | | | |
|---|------------------------------|--------------------------------|
| 1 | Curzon, Water Lane, Richmond | (1 screen / 144 seats); |
| 2 | Odeon, Hill Street, Richmond | (7 screens / 1,006 seats); and |
| 3 | Olympic Studios, Barnes | (2 screens / 201 seats). |
- 5.12 The population within LBRuT is 199,630 in 2021 which would generate around 519,000 cinema trips per annum, based on the national average visitation rate (2.6 trips per annum).
- 5.13 Experian's local expenditure data indicates LBRuT generates £10.75 million on cinema trips. This expenditure estimate appears to be higher than 519,000 cinema trips estimated above i.e. it implies an average of over £20 per person each trip. This figure suggests the cinema visitation rate in LBRuT is higher than the national average (2.6 trips per annum per person).
- 5.14 Adopting the national average population per cinema screen (40,000 trips per screen), implies that 519,000 cinema trips generates demand for 13 cinema screens. In terms of seats, the national average (220 trips per seat) suggests 519,000 trips could support 2,359 seats. These projections suggest a current under-supply of 3 screens or 1,008 seats. Population within LBRuT is projected to increase to 205,200 by 2039, generating 533,000 cinema trips in total. These projections suggest a future under-supply of 1,071 seats at 2039.
- 5.15 These projections suggest that there is theoretical capacity for a further cinema within LBRuT but the presence of three large multiplex cinemas (Odeon in Kingston, Cineworld in Feltham and Wandsworth) may limit operator demand for an additional facility particularly in the short term up to 2024. Furthermore, the longer-term impact of the Covid-19 on the number of cinema trips may reduce this theoretical capacity.

Theatres, nightclubs, live music and other cultural activities

- 5.16 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34.35 million tickets visits,

generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue is £5.7 million. The UK average attendance per performance is 545.

- 5.17 Experian's local expenditure data indicates LBRuT generates £29.08 million on live theatre, concerts and shows. Based on the average ticket revenue per venue (£5.7 million) LBRuT population generates theoretical demand for 5 venues, but LBRuT is unlikely to retain all resident's trips to these venues, due to access to facilities in the West End.
- 5.18 LBRuT existing provision includes Richmond Theatre, The Orange Tree Theatre, The Exchange in Twickenham and Hampton Hill Theatre. This provision appears to be consistent with the theoretical demand generated by the Borough's indigenous population and there is no clear need for additional facilities.
- 5.19 The nightclub sector has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 5.20 LBRuT's land use survey identified only one nightclub (Viva in Richmond). Experian suggests leisure expenditure on admissions to clubs, dances, discos etc is only £5 million within LBRuT. Access to nightclubs in the West End is also likely to limit demand for additional facilities in the Borough.
- 5.21 Experian's local expenditure data indicates LBRuT generates £11.48 million on museums, theme parks, houses and garden. Leisure expenditure is projected to increase by about 16% by 2039. Expenditure growth attracted from the indigenous population is likely to be relatively small (£1.8 million).
- 5.22 LBRuT's existing provision of museums/galleries and other attractions, including Hampton Court Palace and Kew Gardens, attracts a small proportion its visitors from the Borough's the indigenous population. There may be additional potential demand from tourist visitors.
- 5.23 Based on LBRuT's population, there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision. However, there may be potential to increase LBRuT's market share and attract more demand from tourist visitors if provision is improved. The development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Health and fitness clubs

- 5.24 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The sector has more clubs, more members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.7% in the number of memberships and 2.9% growth in the number of facilities.
- 5.25 The Sport England/Active Places data indicates that there are 29 registered health and fitness facilities in LBRuT, with 1,438 fitness stations as shown in Table 5.2.
- LBRuT's 2021 population (199,630) suggests an average of 7.2 fitness stations per 1,000 people. Greater London has 1,131 Sport England registered health and fitness facilities with 77,914 fitness stations (average of 69 stations per facility). This existing provision equates to about 8.6 registered fitness stations per 1,000 people in Greater London in 2021.

Table 5.2 LBRuT health and fitness facilities (Active Places, June 2021)

Name	Type	No. Fitness Stations
Pure Gym (London East Sheen)	Registered Membership use	220
Pure Gym (London Twickenham)	Registered Membership use	220
David Lloyd Club (Hampton)	Registered Membership use	138
Nuffield Health (Twickenham)	Pay and Play	90
Virgin Active Classic (The Twickenham Club)	Registered Membership use	80
Better Gym (London Teddington)	Registered Membership use	77
Lensbury at Teddington Lock	Registered Membership use	77
Richmond Hill Health Club	Registered Membership use	68
Pools on The Park	Registered Membership use	50
Teddington Pools & Fitness Centre	Registered Membership use	46
Richmond Harspa	Registered Membership use	45
The Royal Military School Of Music	Private Use	40
St Marys University	Registered Membership use	33
Anytime Fitness (Twickenham)	Registered Membership use	30
Escape Fitness	Registered Membership use	20
Richmond Athletic Ground	Sports Club / Community Assoc.	20
Richmond Upon Thames College	Sports Club / Community Assoc.	20
Sheen Sports & Fitness Centre	Pay and Play	19
Hampton Heated Open Air Pool	Pay and Play	18
4d Personal Training Studio	Private Use	17
Barn Elms Sports Centre	Registered Membership use	17
Hampton Sport and Fitness Centre	Pay and Play	17
Waldegrave School	Private Use	14
Curves (Hampton Teddington)	Registered Membership use	12
St Pauls School	Private Use	12
Whitton Sports and Fitness Centre	Pay and Play	12
SW14 Women's Fitness	Registered Membership use	11
Bu'sen Martial Arts & Fitness Centre	Registered Membership use	10
Ham Polo Club	Sports Club / Community Assoc.	5
Total		1,438

- 5.26 LBRuT's population (199,630) has a lower provision of fitness registered stations (7.2 per 1,000 people) than the London average (8.6 stations), suggesting lower participation rates, a relative under-supply of fitness stations and/or demand being met elsewhere. Based on the London average (8.6 stations per 1,000 people), the figures suggest a current under-supply of 278 fitness stations in LBRuT, increasing to 287 fitness stations by 2039. However, there appears to be a reasonable spread of facilities across the Borough and there is a quality of provision across other indoor and outdoor facilities that can be accessed. Further evidence base on sport, open space and recreation needs is due to be carried out in early 2022.
- 5.27 Demand for additional facilities within LBRuT should arise from future population growth and/or increased participation rates. As indicated above, LBRuT's population generates £30.21 million on subscriptions to sports and social clubs, which equates to about £21,000 per fitness station.
- 5.28 Based on Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by 12.2% between 2021 to 2039, which is likely to include an increase in

participation rates. With population growth (+3.6%) expenditure on this activity in LBRuT should increase from £30 million to £35 million by 2039, an additional +£5 million. Based on £21,000 per fitness station, this additional expenditure could support 238 new fitness stations by 2039.

- 5.29 These projections suggest an additional requirement of between 238 to 287 new fitness stations by 2039, or 3 to 4 medium sized facilities.

Tenpin bowling and other indoor leisure innovations

- 5.30 As indicated in Section 2, freed-up space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.

- 5.31 There are no tenpin bowling/family entertainment facilities in LBRuT. The nearest facilities are Tenpin outlets at Acton, Feltham, Croydon and Kingston, Hollywood Bowl at Tolworth and All tar Lanes in Westfields White City.

- 5.32 LBRuT's current population (199,630) could theoretically support about 16 lanes, based on the national average of one lane per 12,000 people. This theoretical capacity would increase marginally to 17 lanes by 2021.

- 5.33 There is theoretical capacity for a small to medium sized tenpin bowling/family entertainment facility in LBRuT but provision in neighbouring boroughs may limit operator demand for a new facility. There may also be limited opportunities for large sites.

- 5.34 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.

- 5.35 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms.

- 5.36 Facilities have emerged in London. There is a Flip Out in Wandsworth and Oxygen Freejumping facility in Acton. Gravity Active Entertainment opened in Southside Shopping Centre, Wandsworth which has repurposed retail space as an indoor amusement centre including e-karting, bowling, urban street golf, digital darts as well as eating and drinking facilities. There is a potential scope for further provision in LBRuT, but this sector is still relatively new and its potential for continued growth is unclear. LBRuT's strategy should be flexible to respond to any emerging demand for a trampoline centre.

Bingo, games of chance and gambling

- 5.37 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

- 5.38 The Gambling Commission indicates there are 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.
- 5.39 The adult population in LBRuT is about 155,000, which is theoretically sufficient to support 2 bingo facilities but not a casino, based on the national averages.
- 5.40 There are no main bingo facilities in LBRuT. The nearest facilities are Buzz Bingo at Feltham, Acton and Tooting and Mecca Bingo at Rosehill and Croydon.
- 5.41 There is theoretical scope for a bingo facility in LBRuT, but the presence of existing facilities and relatively low participation rates may limit operator demand.

Conclusions on commercial leisure uses

- 5.42 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g. nightclubs, museums, art galleries, exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. The representation of these emerging uses is relatively limited in LBRuT. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.
- 5.43 In global terms future expenditure growth could support about 4,000 sq.m of new commercial leisure and cultural floorspace in LBRuT by 2034, increasing to 7,000 sq.m by 2039. This additional floorspace could include:
- 1 a further cinema within of about 1,000 seats (6 screens);
 - 2 3 to 4 additional medium sized health and fitness facilities (300 new fitness stations); and
 - 3 a trampoline centre, bingo hall and other new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities.
- 5.44 The development strategy should to be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

6.0 **Conclusions and implications for policy**

Accommodating growth and change

- 6.1 The revised NPPF (July 2021) consolidates a series of proposals that have been made in the last two and half years. In relation to town centres, the revised NPPF does not change the overall aims of policy, although there are some important modifications. For planning policies, local authorities are still required to support the role of town centres and the three main areas policies should focus on:
- 1 defining a network and hierarchy of centres, allowing them to grow and diversify;
 - 2 defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
 - 3 allocating a range of suitable sites to meet the scale and type of development needed for at least 10 years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.
- 6.2 The revised NPPF acknowledges the rapid changes that are affecting town centres. It recognises that diversification is key to the long-term vitality and viability of town centres, including the need for residential development. Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive strategy for the future of each centre.
- 6.3 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings.
- 6.4 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 6.5 As in the original NPPF, applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against the sequential and impact tests.
- 6.6 The sequential test in the NPPF indicates main town centre uses should locate in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered (para. 86). When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (para. 87).
- 6.7 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 90). Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused (para. 91).

- 6.8 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centres will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.
- 6.9 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020 and changes to permitted development rights are proposed from August 2021. These changes will have significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses.
- 6.10 The expenditure projections in this update take account of home shopping made through non-retail businesses, because special forms of trading have been excluded. The study update adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.
- 6.11 The assessment of the potential for new retail, food/beverage floorspace within the previous sections suggests there is modest long-term scope for new development within LBRuT. Tables 6.1 and 6.2 below summarise the floorspace requirements in LBRuT up to 2034 and 2039 (cumulative).

Table 6.1 Summary of retail and food/beverage floorspace requirements up to 2034 (sq.m gross)

Zone/location	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
Richmond	55	-1,895	891	-949
Twickenham	-32	-623	337	-318
Teddington	-16	-322	363	25
Whitton	29	-108	88	9
East Sheen	95	-241	395	249
Other LBRuT	-87	-625	575	-137
Total	43	-3,813	2,649	-1,121

Table 6.2 Summary of retail and food/beverage floorspace requirements up to 2039 (sq.m gross)

Zone/location	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
Richmond	388	-1,342	2,411	1,457
Twickenham	131	-383	868	616
Teddington	100	-209	919	810
Whitton	103	-61	192	234
East Sheen	243	-81	677	839
Other LBRuT	281	-319	1,113	1,075
Total	1,247	-2,396	6,180	5,031

Source: Tables 11 in Appendix 2, 3 and 4.

- 6.12 These projections assume LBRuT can maintain its market share of expenditure in the future. This approach recognises that additional development within Borough could help to increase the area's market share, but this increase will be counter-balanced by development within competing centres. A balanced and sustainable approach has been adopted.
- 6.13 Table 6.1 indicates there is combined over-supply of 1,121 sq.m gross of retail and food/beverage floorspace and other non-retail services up to 2034. By 2039 there is a global under-supply of 5,031 sq.m gross.

- 6.14 As indicated in Section 5, there could be a requirement for about 4,000 sq.m gross of leisure/cultural floorspace by 2034 and then 7,000 sq.m gross by 2039, not included within the activities set out in Tables 6.1 and 6.2. This requirement could counter-balance the over-supply of floorspace up to 2034 via the repurposing of vacated retail space. The net change in total retail, food beverage, leisure/cultural floorspace could be about +3,000 sq.m gross at 2034 increasing to +12,000 sq.m gross at 2039. However, the availability of existing vacant floorspace needs to be considered.
- 6.15 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The revised NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least 10 years. In this case projections beyond 2034 may need to be considered allowing time for future policy to be formulated and adopted. To accommodate growth, local planning authorities should keep town centre boundaries under review.
- 6.16 The floorspace projections should not be adopted as rigid targets or maximum or minimum requirements but viewed as broad guidance. The floorspace projections in this report provide a starting point for the review of site-specific allocations and development management policies.
- 6.17 The existing stock of premises should have a role to play in accommodating any projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
- 6.18 There are 222 vacant shop units within LBRuT's main and local centres, an average vacancy rate of 10.3%, which is slightly below the Goad national average (12.4%). Based on an average of 100 sq.m gross per unit, the total amount of vacant floorspace is could be over 22,000 sq.m gross. A modest reduction in the shop vacancy rate to 2014 levels could accommodate about 5,000 sq.m of new uses, higher than the projected net change in total retail, food beverage, leisure/cultural floorspace (about +3,000 sq.m gross at 2034).
- 6.19 These projections and shop vacancy rates suggest there is no quantitative need to increase the combined amount of retail, food/beverage and leisure/cultural floorspace in LBRuT up to and beyond 2034. There is likely to be a shift from comparison goods retail space to food/beverage and leisure cultural uses, with vacant shop premises also converting to these uses.
- 6.20 The recent changes to the Use Classes Order and permitted development rights, as described in Section 2, will provide more flexibility for landowners to change the use of retail premises to other town centre uses and residential and restrict LBRuT's ability to control the mix of uses in the future.
- 6.21 The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail development in order to accommodate projected growth for the foreseeable future. The priority in the short to medium term will be the reoccupation of vacant shop units, potentially for non-retail uses including food/beverage outlets, leisure, entertainment and cultural uses. Based on a reasonable reduction in vacancy rates, vacant floorspace could theoretically accommodate the need for all new town centre uses up to 2034.
- 6.22 The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

Hierarchy of centres

- 6.23 Continuing to identify the hierarchy of centres in the future development plans is important in terms of:
- 1 ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
 - 2 directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
 - 3 identifying a viable role and strategy for each centre.
- 6.24 The network of centres and parades should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns. Richmond town centre is the largest and dominant town centre in the Borough, consistent with its designation as a Major Centre in the New London Plan. The four designated district centres all continue to play an important role as a focal point in their respective areas. It is appropriate to continue to differentiate these district centre from the smaller local centres and parades in the Borough.
- 6.25 No fundamental change to the current adopted hierarchy of centres is recommended. There may be some anomalies affecting smaller centres, however the hierarchy has been long established and given changes at this time, with a shift towards “living locally” the Council is not proposing any re-categorising, although this can be kept under review.

Impact and sequential tests

- 6.26 Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF states that, when assessing applications for retail and leisure development outside of town centres which are not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. Adopted Policy LP25 directs development to the centres and refers to out-of-centre development. The NPPF requirement for an impact assessment only applies to out-of-centre retail and leisure development. This should be made clear in emerging new policy.
- 6.27 If there is no locally set threshold, the default impact threshold is 2,500 sq. m gross. The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:
- the scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;
 - cumulative effects of recent developments;
 - whether local town centres are vulnerable;
 - the likely effects of development on any town centre strategy; and the impact on any other planned investment.
- 6.28 The PPG also states that where authorities do not have their own floorspace thresholds for impact assessments in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The PPG acknowledges the need to consider the impact of proposals below this floorspace threshold, e.g. if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre.

- 6.29 The NPPF minimum threshold of 2,500 sq.m gross remains an inappropriate threshold for LBRuT, because this scale of development would exceed the overall long-term retail/food beverage/leisure projections for most centres/zones in the Borough.
- 6.30 Vacancy rates have increased in LBRuT. The lower retail capacity projections and uncertainties about the post-Covid recovery suggest town centres are now more vulnerable to out-of-centre developments. Adopted Policy LP25 has lower impact threshold 500 sq.m gross, which is broadly consistent with the Sunday trading limit (280 sq.m net). This impact threshold remains appropriate. Given the overlapping nature of catchment areas in LBRuT, a consistent impact threshold should be applied across the authority area. However, policy should also indicate that impact assessments should be proportionate to the scale of development proposed.
- 6.31 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion, at least until the NPPF is amended to reflect the UCO changes. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, future policy relating to the impact test should refer to retail and leisure uses rather than Class E within the new UCO.
- 6.32 Designated town, district and local centre boundaries should be tightly drawn to assist in controlling the appropriate scale and nature of development. Designated centres remain the expected focus for retail, leisure and other main town centre uses. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.
- 6.33 The continued identification of town centre boundaries is important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. The revised NPPF continues to indicate that the first preference for retail and other town centre uses should be the primary shopping areas (PSA) for retail uses and the town centre boundary for other town centre uses. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.
- 6.34 Policy regarding edge and out-of-centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to refer to the centre boundaries. The PSA normally comprises the core/primary shopping frontages and the contiguous secondary shopping frontages. In many small centres the PSA (primary and secondary frontages combined) and the town centre boundary may cover the same area and it may be unnecessary to designate two boundaries.
- 6.35 The relatively low floorspace capacity projections and the higher number of vacant shop units (222) in centres and parades suggest there is no need to extend the centre boundaries to accommodate future growth.

Frontage policies

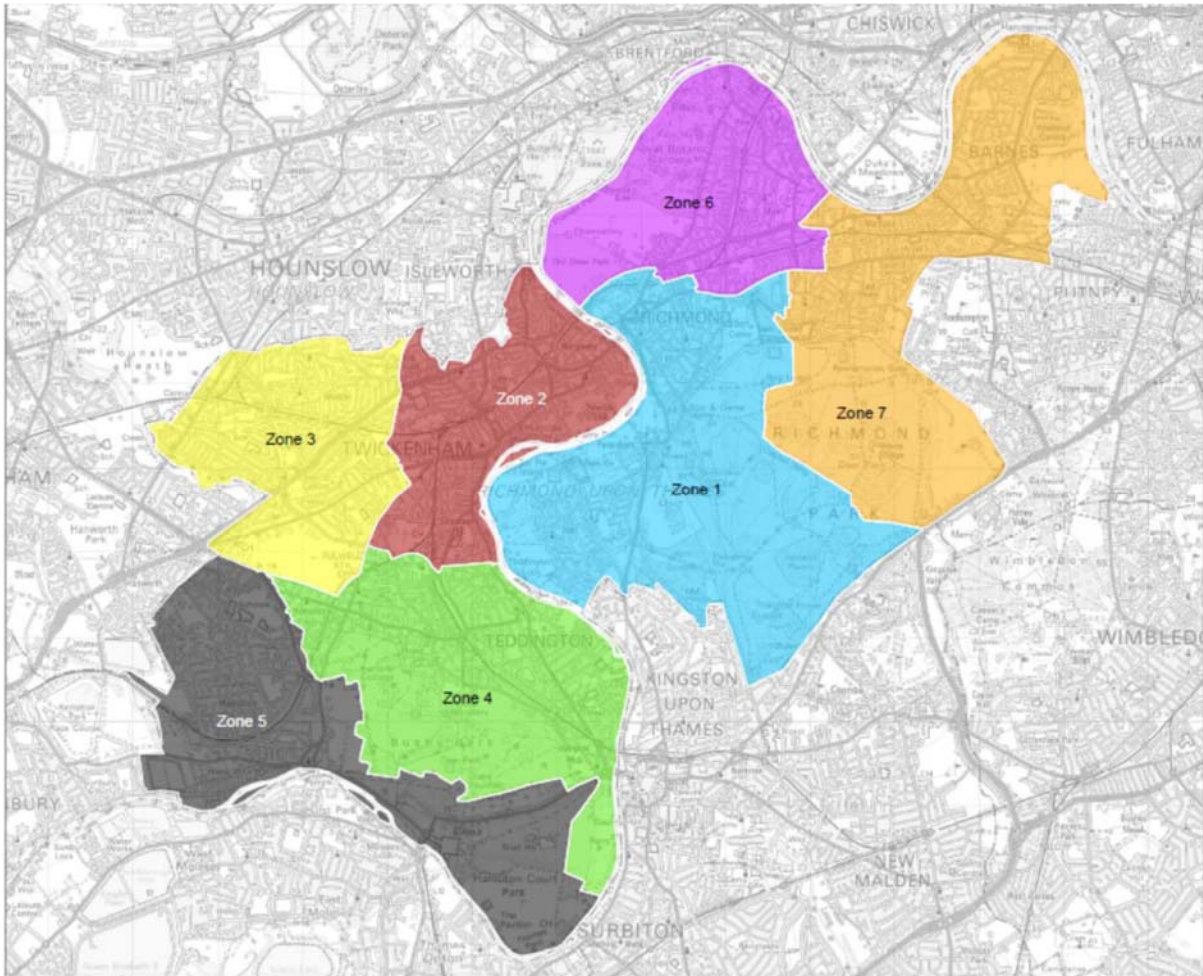
- 6.36 Adopted Policy LP26 currently designates Key and Secondary Shopping Frontages/areas within designated centres. The Key Shopping Frontages were expected to contain the main concentration of retail use. Existing policies generally seeks to concentrate and protect retail uses within the Key Shopping Frontages, whilst allowing a more flexible approach in Secondary Frontages. These frontage designations will need to be examined in more detail in Phase 2.
- 6.37 It is for the Council to consider the findings of Phase 1, against Government policy and requirements along with other local factors, to determine appropriate policy options including frontage policies, the uses that are protected and supported, and the degree of flexibility that

may be appropriate. Further work through Phase 2 will also inform revisions to the draft Plan, when there may be greater understanding around implications of the pandemic and the extent of changes around the retail and leisure sectors, to determine the appropriate strategy for the future of the Borough's centres.

- 6.38 The Council is working with the business community and a range of stakeholders to understand the future for town centres and high streets. In May 2021, a Richmond Partnership Conference was held, discussing town centres as destinations and people-focused centres, along with the need for creative planning and to embrace the digital revolution. This has been followed up through a series of ten Community Conversations in 2021, which included discussion on the future of our High Streets, based on places across the Borough, which will inform the Council's future approach along with further partnership working.

Appendix 1 Study Area

Zone	Wards
1	South Richmond Ham, Petersham and Richmond Riverside
2	St Margaret's and North Twickenham Twickenham Riverside South Twickenham
3	Whitton Heathfield West Twickenham
4	Fulwell and Hampton Hill Teddington Hampton Wick
5	Hampton Hampton North
6	Kew North Richmond
7	Mortlake and Barnes Common Barnes East Sheen



Appendix 1 Convenience goods assessment

Table 1 - Study area population projections

Zone	2021	2024	2029	2034	2039
Zone 1 - Richmond	23,031	22,440	22,056	22,170	22,536
Zone 2 - Twickenham	34,007	33,825	33,884	33,964	34,652
Zone 3 - Whitton	32,515	32,428	32,942	33,069	33,672
Zone 4 - Teddington	33,610	33,557	33,842	33,850	34,436
Zone 5 -Hampton	19,993	19,837	19,808	19,800	20,063
Zone 6 - Kew/North Richmond	23,835	23,546	24,061	24,706	25,230
Zone 7 - Barnes/East Sheen	32,639	32,587	33,552	33,989	34,611
LBRuT Total	199,630	198,220	200,146	201,548	205,200

Sources:

GLA ward level population projections - housing led 2018-based

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2021	2024	2029	2034	2039
Zone 1 - Richmond	2,871	2,859	2,843	2,845	2,853
Zone 2 - Twickenham	2,706	2,694	2,679	2,681	2,689
Zone 3 - Whitton	2,211	2,202	2,190	2,191	2,197
Zone 4 - Teddington	2,582	2,570	2,556	2,558	2,565
Zone 5 -Hampton	2,385	2,375	2,362	2,364	2,371
Zone 6 - Kew/North Richmond	2,777	2,765	2,750	2,752	2,760
Zone 7 - Barnes/East Sheen	2,763	2,751	2,736	2,738	2,746

Sources:

Experian Local Expenditure 2019 (2019 prices)

Experian growth rates - Retail Planner Briefing Note 18 (October 2020)

Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m)

Zone	2021	2024	2029	2034	2039
Zone 1 - Richmond	66.13	64.15	62.71	63.08	64.30
Zone 2 - Twickenham	92.02	91.12	90.78	91.06	93.17
Zone 3 - Whitton	71.90	71.40	72.13	72.46	73.99
Zone 4 - Teddington	86.77	86.26	86.52	86.60	88.35
Zone 5 -Hampton	47.69	47.11	46.79	46.80	47.56
Zone 6 - Kew/North Richmond	66.19	65.10	66.16	67.98	69.62
Zone 7 - Barnes/East Sheen	90.20	89.66	91.81	93.07	95.05
LBRuT Total	520.90	514.81	516.91	521.06	532.04

Source: Tables 1 and 2

Table 4 - Base year 2021 convenience goods market shares by zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Richmond	42.7%	12.9%	1.0%	0.5%	0.3%	46.7%	33.2%	20.0%
Twickenham	0.3%	38.3%	13.5%	4.0%	0.8%	3.9%	0.4%	15.0%
Teddington	0.0%	4.1%	0.6%	41.8%	0.9%	0.0%	0.0%	15.0%
Whitton	0.0%	0.0%	35.2%	0.0%	0.1%	1.2%	0.0%	10.0%
East Sheen	14.9%	1.0%	0.1%	0.4%	0.0%	14.5%	30.7%	15.0%
Hampton/Hampton Hill	3.3%	9.9%	17.3%	28.9%	76.8%	0.1%	0.0%	10.0%
Other LBRuT	20.8%	9.8%	2.0%	3.4%	0.1%	18.5%	19.9%	5.0%
LBRuT total	82.0%	76.0%	69.7%	79.0%	79.0%	84.9%	84.2%	
Outflow	18.0%	24.0%	30.3%	21.0%	21.0%	15.1%	15.8%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey March 2014 and Lichfields' analysis.

Table 5 - Base year 2021 convenience goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2021	66.13	92.02	71.90	86.77	47.69	66.19	90.20		520.90
Richmond	28.24	11.87	0.72	0.43	0.14	30.91	29.95	25.56	127.82
Twickenham	0.20	35.24	9.71	3.47	0.38	2.58	0.36	9.17	61.11
Teddington	0.00	3.77	0.43	36.27	0.43	0.00	0.00	7.22	48.12
Whitton	0.00	0.00	25.31	0.00	0.05	0.79	0.00	2.91	29.06
East Sheen	9.85	0.92	0.07	0.35	0.00	9.60	27.69	8.56	57.04
Hampton/Hampton Hill	2.18	9.11	12.44	25.08	36.63	0.07	0.00	9.50	95.00
Other LBRuT	13.75	9.02	1.44	2.95	0.05	12.24	17.95	3.02	60.42
LBRuT total	54.22	69.93	50.12	68.55	37.68	56.19	75.95	65.93	478.57
Outflow	11.90	22.08	21.79	18.22	10.02	9.99	14.25		108.26
TOTAL	66.13	92.02	71.90	86.77	47.69	66.19	90.20	65.93	586.83

Source: Tables 3 and 4

Table 6 - Future 2024 convenience goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2024	64.15	91.12	71.40	86.26	47.11	65.10	89.66		514.81
Richmond	27.39	11.76	0.71	0.43	0.14	30.40	29.77	25.15	125.75
Twickenham	0.19	34.90	9.64	3.45	0.38	2.54	0.36	9.08	60.54
Teddington	0.00	3.74	0.43	36.06	0.42	0.00	0.00	7.17	47.82
Whitton	0.00	0.00	25.13	0.00	0.05	0.78	0.00	2.88	28.85
East Sheen	9.56	0.91	0.07	0.35	0.00	9.44	27.53	8.44	56.30
Hampton/Hampton Hill	2.12	9.02	12.35	24.93	36.18	0.07	0.00	9.41	94.08
Other LBRuT	13.34	8.93	1.43	2.93	0.05	12.04	17.84	2.98	59.54
LBRuT total	52.60	69.25	49.76	68.14	37.22	55.27	75.50	65.12	472.87
Outflow	11.55	21.87	21.63	18.11	9.89	9.83	14.17		107.06
TOTAL	64.15	91.12	71.40	86.26	47.11	65.10	89.66	65.12	579.93

Source: Tables 3 and 4

Table 7 - Future 2029 convenience goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2029	62.71	90.78	72.13	86.52	46.79	66.16	91.81		516.91
Richmond	26.78	11.71	0.72	0.43	0.14	30.90	30.48	25.29	126.45
Twickenham	0.19	34.77	9.74	3.46	0.37	2.58	0.37	9.08	60.56
Teddington	0.00	3.72	0.43	36.16	0.42	0.00	0.00	7.19	47.93
Whitton	0.00	0.00	25.39	0.00	0.05	0.79	0.00	2.91	29.15
East Sheen	9.34	0.91	0.07	0.35	0.00	9.59	28.19	8.55	57.00
Hampton/Hampton Hill	2.07	8.99	12.48	25.00	35.93	0.07	0.00	9.39	93.93
Other LBRuT	13.04	8.90	1.44	2.94	0.05	12.24	18.27	2.99	59.88
LBRuT total	51.42	69.00	50.28	68.35	36.96	56.17	77.31	65.42	474.90
Outflow	11.29	21.79	21.86	18.17	9.83	9.99	14.51		107.42
TOTAL	62.71	90.78	72.13	86.52	46.79	66.16	91.81	65.42	582.32

Source: Tables 3 and 4

Table 8 - Future 2034 convenience goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2034	63.08	91.06	72.46	86.60	46.80	67.98	93.07		521.06
Richmond	26.93	11.75	0.72	0.43	0.14	31.75	30.90	25.66	128.28
Twickenham	0.19	34.88	9.78	3.46	0.37	2.65	0.37	9.13	60.84
Teddington	0.00	3.73	0.43	36.20	0.42	0.00	0.00	7.20	47.98
Whitton	0.00	0.00	25.51	0.00	0.05	0.82	0.00	2.93	29.30
East Sheen	9.40	0.91	0.07	0.35	0.00	9.86	28.57	8.68	57.83
Hampton/Hampton Hill	2.08	9.02	12.54	25.03	35.94	0.07	0.00	9.41	94.08
Other LBRuT	13.12	8.92	1.45	2.94	0.05	12.58	18.52	3.03	60.61
LBRuT total	51.72	69.21	50.51	68.41	36.97	57.72	78.37	66.02	478.93
Outflow	11.35	21.85	21.96	18.19	9.83	10.27	14.71		108.15
TOTAL	63.08	91.06	72.46	86.60	46.80	67.98	93.07	66.02	587.08

Source: Tables 3 and 4

Table 9 - Future 2039 convenience goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2039	64.30	93.17	73.99	88.35	47.56	69.62	95.05		532.04
Richmond	27.46	12.02	0.74	0.44	0.14	32.51	31.56	26.22	131.09
Twickenham	0.19	35.68	9.99	3.53	0.38	2.72	0.38	9.33	62.21
Teddington	0.00	3.82	0.44	36.93	0.43	0.00	0.00	7.34	48.97
Whitton	0.00	0.00	26.05	0.00	0.05	0.84	0.00	2.99	29.92
East Sheen	9.58	0.93	0.07	0.35	0.00	10.10	29.18	8.86	59.08
Hampton/Hampton Hill	2.12	9.22	12.80	25.53	36.53	0.07	0.00	9.59	95.86
Other LBRuT	13.37	9.13	1.48	3.00	0.05	12.88	18.91	3.10	61.93
LBRuT total	52.73	70.81	51.57	69.79	37.57	59.11	80.03	67.43	489.04
Outflow	11.57	22.36	22.42	18.55	9.99	10.51	15.02		110.43
TOTAL	64.30	93.17	73.99	88.35	47.56	69.62	95.05	67.43	599.47

Source: Tables 3 and 4

Table 10 - Summary of convenience goods expenditure 2021 to 2039 (£M)

Area	2021	2024	2029	2034	2039
Available expenditure					
Richmond	127.82	125.75	126.45	128.28	131.09
Twickenham	61.11	60.54	60.56	60.84	62.21
Teddington	48.12	47.82	47.93	47.98	48.97
Whitton	29.06	28.85	29.15	29.30	29.92
East Sheen	57.04	56.30	57.00	57.83	59.08
Hampton/Hampton Hill	95.00	94.08	93.93	94.08	95.86
Other LBRuT	60.42	59.54	59.88	60.61	61.93
Total	478.57	472.87	474.90	478.93	489.04
Turnover of existing facilities					
Richmond	127.82	127.82	127.82	127.82	127.82
Twickenham	61.11	61.11	61.11	61.11	61.11
Teddington	48.12	48.12	48.12	48.12	48.12
Whitton	29.06	29.06	29.06	29.06	29.06
East Sheen	57.04	57.04	57.04	57.04	57.04
Hampton/Hampton Hill	95.00	95.00	95.00	95.00	95.00
Other LBRuT	60.42	60.42	60.42	60.42	60.42
Total	478.57	478.57	478.57	478.57	478.57
Surplus/deficit expenditure £M					
Richmond	0.00	-2.07	-1.37	0.46	3.26
Twickenham	0.00	-0.57	-0.54	-0.27	1.10
Teddington	0.00	-0.31	-0.19	-0.14	0.84
Whitton	0.00	-0.21	0.09	0.24	0.86
East Sheen	0.00	-0.74	-0.04	0.80	2.04
Hampton/Hampton Hill	0.00	-0.93	-1.07	-0.92	0.86
Other LBRuT	0.00	-0.88	-0.55	0.19	1.50
Total	0.00	-5.70	-3.67	0.36	10.47

Source: Tables 5 to 9

Table 11 - Convenience goods floorspace capacity up to 2039

	2021	2024	2029	2034	2039
Turnover density new floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000	£12,000
Floorspace projection (sq.m net)					
Richmond	0	-172	-114	38	272
Twickenham	0	-48	-45	-23	92
Teddington	0	-25	-16	-11	70
Whitton	0	-18	7	20	72
East Sheen	0	-62	-3	67	170
Hampton/Hampton Hill	0	-77	-89	-77	72
Other LBRuT	0	-73	-46	16	125
Total	0	-475	-306	30	873
Floorspace Projection (sq.m gross)					
Richmond	0	-246	-163	55	388
Twickenham	0	-68	-65	-32	131
Teddington	0	-36	-23	-16	100
Whitton	0	-25	11	29	103
East Sheen	0	-88	-4	95	243
Hampton/Hampton Hill	0	-110	-127	-110	102
Other LBRuT	0	-105	-65	23	179
Total	0	-679	-437	43	1,247

Source: Table 10

Appendix 2 Comparison goods assessment

Table 1 - Study area population projections

Zone	2021	2024	2029	2034	2039
Zone 1 - Richmond	23,031	22,440	22,056	22,170	22,536
Zone 2 - Twickenham	34,007	33,825	33,884	33,964	34,652
Zone 3 - Whitton	32,515	32,428	32,942	33,069	33,672
Zone 4 - Teddington	33,610	33,557	33,842	33,850	34,436
Zone 5 -Hampton	19,993	19,837	19,808	19,800	20,063
Zone 6 - Kew/North Richmond	23,835	23,546	24,061	24,706	25,230
Zone 7 - Barnes/East Sheen	32,639	32,587	33,552	33,989	34,611
LBRuT Total	199,630	198,220	200,146	201,548	205,200

Sources:

GLA ward level population projections - housing led 2018-based

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2021	2024	2029	2034	2039
Zone 1 - Richmond	4,317	4,620	5,163	5,851	6,684
Zone 2 - Twickenham	4,242	4,539	5,073	5,748	6,567
Zone 3 - Whitton	3,291	3,522	3,936	4,460	5,096
Zone 4 - Teddington	4,063	4,349	4,859	5,507	6,291
Zone 5 -Hampton	3,678	3,937	4,399	4,985	5,695
Zone 6 - Kew/North Richmond	4,308	4,610	5,152	5,838	6,670
Zone 7 - Barnes/East Sheen	4,322	4,626	5,169	5,858	6,692

Sources:

Experian Local Expenditure 2019 (2019 prices)

Experian growth rates - Retail Planner Briefing Note 18 (October 2020)

Excludes Special Forms of Trading

Table 3 - Total comparison goods expenditure (£m)

Zone	2021	2024	2029	2034	2039
Zone 1 - Richmond	99.42	103.68	113.87	129.71	150.63
Zone 2 - Twickenham	144.24	153.55	171.88	195.23	227.57
Zone 3 - Whitton	107.01	114.23	129.66	147.50	171.59
Zone 4 - Teddington	136.56	145.93	164.45	186.40	216.64
Zone 5 -Hampton	73.54	78.09	87.14	98.71	114.27
Zone 6 - Kew/North Richmond	102.68	108.55	123.96	144.24	168.28
Zone 7 - Barnes/East Sheen	141.08	150.74	173.43	199.10	231.63
LBRuT Total	804.54	854.76	964.39	1,100.89	1,280.60

Source: Tables 1 and 2

Table 4 - Base year 2021 comparison goods market shares by zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Richmond	35.3%	17.1%	6.8%	5.7%	4.3%	33.0%	18.9%	20.0%
Twickenham	0.5%	18.1%	14.5%	4.1%	1.6%	1.4%	1.1%	30.0%
Teddington	0.8%	1.9%	1.0%	14.9%	1.1%	0.2%	0.1%	30.0%
Whitton	0.1%	0.5%	11.3%	0.0%	0.3%	0.0%	0.2%	10.0%
East Sheen	3.1%	0.1%	0.4%	0.7%	0.0%	7.0%	19.5%	20.0%
Kew Retail Park	2.7%	3.2%	2.5%	0.2%	0.9%	18.0%	6.6%	35.0%
Other LBRuT	1.3%	1.6%	2.0%	4.2%	12.9%	2.6%	5.7%	10.0%
LBRuT total	43.8%	42.5%	38.5%	29.8%	21.1%	62.2%	52.1%	
Outflow	56.2%	57.5%	61.5%	70.2%	78.9%	37.8%	47.9%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey March 2014 and Lichfields' analysis.

Table 5 - Base year 2021 comparison goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2021	99.42	144.24	107.01	136.56	73.54	102.68	141.08		804.54
Richmond	35.10	24.67	7.28	7.78	3.16	33.88	26.66	34.63	173.16
Twickenham	0.50	26.11	15.52	5.60	1.18	1.44	1.55	22.24	74.12
Teddington	0.80	2.74	1.07	20.35	0.81	0.21	0.14	11.19	37.30
Whitton	0.10	0.72	12.09	0.00	0.22	0.00	0.28	1.49	14.91
East Sheen	3.08	0.14	0.43	0.96	0.00	7.19	27.51	9.83	49.13
Kew Retail Park	2.68	4.62	2.68	0.27	0.66	18.48	9.31	20.84	59.54
Other LBRuT	1.29	2.31	2.14	5.74	9.49	2.67	8.04	3.52	35.19
LBRuT total	43.55	61.30	41.20	40.70	15.52	63.86	73.50	103.74	443.37
Outflow	55.88	82.94	65.81	95.87	58.02	38.81	67.57		464.91
TOTAL	99.42	144.24	107.01	136.56	73.54	102.68	141.08	103.74	908.27

Source: Tables 3 and 4

Table 6 - Future 2024 comparison goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2024	103.68	153.55	114.23	145.93	78.09	108.55	150.74		854.76
Richmond	36.60	26.26	7.77	8.32	3.36	35.82	28.49	36.65	183.26
Twickenham	0.52	27.79	16.56	5.98	1.25	1.52	1.66	23.69	78.98
Teddington	0.83	2.92	1.14	21.74	0.86	0.22	0.15	11.94	39.80
Whitton	0.10	0.77	12.91	0.00	0.23	0.00	0.30	1.59	15.91
East Sheen	3.21	0.15	0.46	1.02	0.00	7.60	29.39	10.46	52.30
Kew Retail Park	2.80	4.91	2.86	0.29	0.70	19.54	9.95	22.10	63.16
Other LBRuT	1.35	2.46	2.28	6.13	10.07	2.82	8.59	3.75	37.45
LBRuT total	45.41	65.26	43.98	43.49	16.48	67.52	78.54	110.19	470.85
Outflow	58.27	88.29	70.25	102.44	61.62	41.03	72.21		494.10
TOTAL	103.68	153.55	114.23	145.93	78.09	108.55	150.74	110.19	964.95

Source: Tables 3 and 4

Table 7 - Future 2029 comparison goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2029	113.87	171.88	129.66	164.45	87.14	123.96	173.43		964.39
Richmond	40.20	29.39	8.82	9.37	3.75	40.91	32.78	41.30	206.51
Twickenham	0.57	31.11	18.80	6.74	1.39	1.74	1.91	26.68	88.94
Teddington	0.91	3.27	1.30	24.50	0.96	0.25	0.17	13.44	44.79
Whitton	0.11	0.86	14.65	0.00	0.26	0.00	0.35	1.80	18.04
East Sheen	3.53	0.17	0.52	1.15	0.00	8.68	33.82	11.97	59.84
Kew Retail Park	3.07	5.50	3.24	0.33	0.78	22.31	11.45	25.14	71.83
Other LBRuT	1.48	2.75	2.59	6.91	11.24	3.22	9.89	4.23	42.31
LBRuT total	49.88	73.05	49.92	49.01	18.39	77.10	90.36	124.57	532.26
Outflow	64.00	98.83	79.74	115.44	68.75	46.86	83.08		556.69
TOTAL	113.87	171.88	129.66	164.45	87.14	123.96	173.43	124.57	1,088.96

Source: Tables 3 and 4

Table 8 - Future 2034 comparison goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2034	129.71	195.23	147.50	186.40	98.71	144.24	199.10		1,100.89
Richmond	45.79	33.39	10.03	10.62	4.24	47.60	37.63	47.32	236.62
Twickenham	0.65	35.34	21.39	7.64	1.58	2.02	2.19	30.34	101.15
Teddington	1.04	3.71	1.48	27.77	1.09	0.29	0.20	15.24	50.81
Whitton	0.13	0.98	16.67	0.00	0.30	0.00	0.40	2.05	20.52
East Sheen	4.02	0.20	0.59	1.30	0.00	10.10	38.82	13.76	68.79
Kew Retail Park	3.50	6.25	3.69	0.37	0.89	25.96	13.14	28.97	82.77
Other LBRuT	1.69	3.12	2.95	7.83	12.73	3.75	11.35	4.82	48.25
LBRuT total	56.81	82.97	56.79	55.55	20.83	89.72	103.73	142.52	608.92
Outflow	72.89	112.26	90.71	130.85	77.88	54.52	95.37		634.49
TOTAL	129.71	195.23	147.50	186.40	98.71	144.24	199.10	142.52	1,243.41

Source: Tables 3 and 4

Table 9 - Future 2039 comparison goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2039	150.63	227.57	171.59	216.64	114.27	168.28	231.63		1,280.60
Richmond	53.17	38.91	11.67	12.35	4.91	55.53	43.78	55.08	275.41
Twickenham	0.75	41.19	24.88	8.88	1.83	2.36	2.55	35.33	117.77
Teddington	1.21	4.32	1.72	32.28	1.26	0.34	0.23	17.72	59.07
Whitton	0.15	1.14	19.39	0.00	0.34	0.00	0.46	2.39	23.87
East Sheen	4.67	0.23	0.69	1.52	0.00	11.78	45.17	16.01	80.06
Kew Retail Park	4.07	7.28	4.29	0.43	1.03	30.29	15.29	33.75	96.43
Other LBRuT	1.96	3.64	3.43	9.10	14.74	4.38	13.20	5.61	56.05
LBRuT total	65.98	96.72	66.06	64.56	24.11	104.67	120.68	165.89	708.66
Outflow	84.65	130.85	105.53	152.08	90.16	63.61	110.95		737.83
TOTAL	150.63	227.57	171.59	216.64	114.27	168.28	231.63	165.89	1,446.48

Source: Tables 3 and 4

Table 10 - Summary of comparison goods expenditure 2021 to 2039 (£M)

Area	2021	2024	2029	2034	2039
Available expenditure					
Richmond	173.16	183.26	206.51	236.62	275.41
Twickenham	74.12	78.98	88.94	101.15	117.77
Teddington	37.30	39.80	44.79	50.81	59.07
Whitton	14.91	15.91	18.04	20.52	23.87
East Sheen	49.13	52.30	59.84	68.79	80.06
Kew Retail Park	59.54	63.16	71.83	82.77	96.43
Other LBRuT	35.19	37.45	42.31	48.25	56.05
Total	443.37	470.85	532.26	608.92	708.66
Turnover of existing facilities/commitments					
Richmond	176.46	195.64	225.04	255.85	290.89
Twickenham	74.12	82.18	94.53	107.47	122.19
Teddington	37.30	41.35	47.57	54.08	61.49
Whitton	14.91	16.53	19.01	21.61	24.57
East Sheen	49.13	54.47	62.66	71.24	80.99
Kew Retail Park	59.54	66.01	75.93	86.33	98.15
Other LBRuT	35.19	39.02	44.88	51.03	58.01
Total	446.67	495.19	569.61	647.62	736.30
Surplus/deficit expenditure £M					
Richmond	-3.30	-12.37	-18.52	-19.23	-15.48
Twickenham	0.00	-3.20	-5.58	-6.32	-4.42
Teddington	0.00	-1.55	-2.77	-3.27	-2.41
Whitton	0.00	-0.62	-0.97	-1.09	-0.70
East Sheen	0.00	-2.17	-2.82	-2.45	-0.94
Kew Retail Park	0.00	-2.86	-4.10	-3.56	-1.73
Other LBRuT	0.00	-1.56	-2.57	-2.78	-1.96
Total	-3.30	-24.34	-37.35	-38.70	-27.64

Source: Tables 5 to 9

Table 11 - Comparison goods floorspace capacity up to 2039

	2021	2024	2029	2034	2039
Turnover density new floorspace (£ per sq.m)	£7,000	£7,760	£8,927	£10,149	£11,539
Floorspace projection (sq.m net)					
Richmond	-471	-1,594	-2,075	-1,895	-1,342
Twickenham	0	-412	-626	-623	-383
Teddington	0	-200	-310	-322	-209
Whitton	0	-80	-109	-108	-61
East Sheen	0	-280	-316	-241	-81
Kew Retail Park	0	-368	-460	-351	-150
Other LBRuT	0	-202	-288	-274	-170
Total	-471	-3,137	-4,184	-3,813	-2,396
Floorspace Projection (sq.m gross)					
Richmond	-589	-2,126	-2,767	-2,526	-1,789
Twickenham	0	-550	-834	-831	-511
Teddington	0	-267	-414	-429	-279
Whitton	0	-107	-145	-144	-81
East Sheen	0	-373	-422	-322	-108
Kew Retail Park	0	-491	-613	-468	-199
Other LBRuT	0	-269	-384	-365	-227
Total	-589	-4,182	-5,579	-5,084	-3,194

Source: Table 10

Appendix 3 Food and beverage assessment

Table 1 - Study area population projections

Zone	2021	2024	2029	2034	2039
Zone 1 - Richmond	23,031	22,440	22,056	22,170	22,536
Zone 2 - Twickenham	34,007	33,825	33,884	33,964	34,652
Zone 3 - Whitton	32,515	32,428	32,942	33,069	33,672
Zone 4 - Teddington	33,610	33,557	33,842	33,850	34,436
Zone 5 -Hampton	19,993	19,837	19,808	19,800	20,063
Zone 6 - Kew/North Richmond	23,835	23,546	24,061	24,706	25,230
Zone 7 - Barnes/East Sheen	32,639	32,587	33,552	33,989	34,611
LBRuT Total	199,630	198,220	200,146	201,548	205,200

Sources:

GLA ward level population projections - housing led 2018-based

Table 2 - Food/beverage expenditure per person per annum (£)

Zone	2021	2024	2029	2034	2039
Zone 1 - Richmond	2,110	2,565	2,845	2,975	3,112
Zone 2 - Twickenham	1,947	2,367	2,625	2,746	2,872
Zone 3 - Whitton	1,284	1,561	1,732	1,811	1,894
Zone 4 - Teddington	1,734	2,108	2,338	2,445	2,557
Zone 5 -Hampton	1,424	1,731	1,921	2,009	2,101
Zone 6 - Kew/North Richmond	2,010	2,444	2,711	2,835	2,965
Zone 7 - Barnes/East Sheen	2,032	2,470	2,739	2,865	2,996

Sources:

Experian Local Expenditure 2019 (2019 prices)

Experian growth rates - Retail Planner Briefing Note 18 (October 2020)

Table 3 - Total food/beverage expenditure (£m)

Zone	2021	2024	2029	2034	2039
Zone 1 - Richmond	48.60	57.55	62.75	65.96	70.13
Zone 2 - Twickenham	66.22	80.06	88.96	93.26	99.50
Zone 3 - Whitton	41.76	50.63	57.05	59.89	63.78
Zone 4 - Teddington	58.28	70.74	79.13	82.77	88.07
Zone 5 -Hampton	28.48	34.35	38.04	39.77	42.15
Zone 6 - Kew/North Richmond	47.92	57.54	65.22	70.04	74.80
Zone 7 - Barnes/East Sheen	66.31	80.48	91.91	97.37	103.70
LBRuT Total	357.57	431.34	483.07	509.07	542.12

Source: Tables 1 and 2

Table 4 - Base year 2021 food/beverage market shares by zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Richmond	65.0%	32.0%	23.5%	15.5%	6.5%	40.9%	19.4%	40.0%
Twickenham	1.1%	37.8%	32.7%	0.7%	6.1%	1.7%	0.2%	30.0%
Teddington	4.0%	9.3%	13.9%	57.6%	18.1%	1.0%	0.1%	20.0%
Whitton	0.0%	0.0%	16.4%	0.3%	5.8%	0.0%	0.0%	30.0%
East Sheen	1.6%	0.0%	0.0%	1.3%	0.0%	14.6%	25.0%	20.0%
Barnes	0.0%	0.0%	0.9%	0.0%	2.3%	1.8%	31.6%	20.0%
Other LBRuT	6.1%	1.8%	1.1%	11.0%	36.7%	18.4%	0.7%	10.0%
LBRuT total	77.8%	80.9%	88.5%	86.4%	75.5%	78.4%	77.0%	
Outflow	22.2%	19.1%	11.5%	13.6%	24.5%	21.6%	23.0%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey March 2014 and Lichfields' analysis.

Table 5 - Base year 2021 food/beverage expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2021	48.60	66.22	41.76	58.28	28.48	47.92	66.31		357.57
Richmond	31.59	21.19	9.81	9.03	1.85	19.60	12.86	70.63	176.56
Twickenham	0.53	25.03	13.66	0.41	1.74	0.81	0.13	18.13	60.45
Teddington	1.94	6.16	5.81	33.57	5.15	0.48	0.07	13.29	66.47
Whitton	0.00	0.00	6.85	0.17	1.65	0.00	0.00	3.72	12.39
East Sheen	0.78	0.00	0.00	0.76	0.00	7.00	16.58	6.28	31.39
Barnes	0.00	0.00	0.38	0.00	0.66	0.86	20.95	5.71	28.56
Other LBRuT	2.96	1.19	0.46	6.41	10.45	8.82	0.46	3.42	34.18
LBRuT total	37.81	53.57	36.96	50.36	21.50	37.57	51.06	121.18	410.00
Outflow	10.79	12.65	4.80	7.93	6.98	10.35	15.25		68.74
TOTAL	48.60	66.22	41.76	58.28	28.48	47.92	66.31	121.18	478.75

Source: Tables 3 and 4

Table 6 - Future 2024 food/beverage expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2024	57.55	80.06	50.63	70.74	34.35	57.54	80.48		431.34
Richmond	37.41	25.62	11.90	10.96	2.23	23.53	15.61	84.85	212.12
Twickenham	0.63	30.26	16.56	0.50	2.10	0.98	0.16	21.93	73.12
Teddington	2.30	7.45	7.04	40.74	6.22	0.58	0.08	16.10	80.50
Whitton	0.00	0.00	8.30	0.21	1.99	0.00	0.00	4.50	15.01
East Sheen	0.92	0.00	0.00	0.92	0.00	8.40	20.12	7.59	37.95
Barnes	0.00	0.00	0.46	0.00	0.79	1.04	25.43	6.93	34.64
Other LBRuT	3.51	1.44	0.56	7.78	12.61	10.59	0.56	4.12	41.16
LBRuT total	44.78	64.77	44.81	61.12	25.93	45.11	61.97	146.02	494.50
Outflow	12.78	15.29	5.82	9.62	8.42	12.43	18.51		82.86
TOTAL	57.55	80.06	50.63	70.74	34.35	57.54	80.48	146.02	577.36

Source: Tables 3 and 4

Table 7 - Future 2029 food/beverage expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2029	62.75	88.96	57.05	79.13	38.04	65.22	91.91		483.07
Richmond	40.79	28.47	13.41	12.27	2.47	26.68	17.83	94.60	236.51
Twickenham	0.69	33.63	18.66	0.55	2.32	1.11	0.18	24.49	81.63
Teddington	2.51	8.27	7.93	45.58	6.89	0.65	0.09	17.98	89.90
Whitton	0.00	0.00	9.36	0.24	2.21	0.00	0.00	5.06	16.86
East Sheen	1.00	0.00	0.00	1.03	0.00	9.52	22.98	8.63	43.17
Barnes	0.00	0.00	0.51	0.00	0.88	1.17	29.04	7.90	39.51
Other LBRuT	3.83	1.60	0.63	8.70	13.96	12.00	0.64	4.60	45.96
LBRuT total	48.82	71.97	50.49	68.37	28.72	51.13	70.77	163.26	553.54
Outflow	13.93	16.99	6.56	10.76	9.32	14.09	21.14		92.79
TOTAL	62.75	88.96	57.05	79.13	38.04	65.22	91.91	163.26	646.33

Source: Tables 3 and 4

Table 8 - Future 2034 food/beverage expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2034	65.96	93.26	59.89	82.77	39.77	70.04	97.37		509.07
Richmond	42.88	29.84	14.08	12.83	2.59	28.65	18.89	99.83	249.57
Twickenham	0.73	35.25	19.59	0.58	2.43	1.19	0.19	25.69	85.65
Teddington	2.64	8.67	8.33	47.68	7.20	0.70	0.10	18.83	94.14
Whitton	0.00	0.00	9.82	0.25	2.31	0.00	0.00	5.30	17.68
East Sheen	1.06	0.00	0.00	1.08	0.00	10.23	24.34	9.18	45.88
Barnes	0.00	0.00	0.54	0.00	0.91	1.26	30.77	8.37	41.86
Other LBRuT	4.02	1.68	0.66	9.11	14.60	12.89	0.68	4.85	48.48
LBRuT total	51.32	75.44	53.01	71.52	30.03	54.91	74.98	172.05	583.25
Outflow	14.64	17.81	6.89	11.26	9.74	15.13	22.40		97.87
TOTAL	65.96	93.26	59.89	82.77	39.77	70.04	97.37	172.05	681.12

Source: Tables 3 and 4

Table 9 - Future 2039 food/beverage expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2039	70.13	99.50	63.78	88.07	42.15	74.80	103.70		542.12
Richmond	45.58	31.84	14.99	13.65	2.74	30.59	20.12	106.34	265.85
Twickenham	0.77	37.61	20.86	0.62	2.57	1.27	0.21	27.39	91.30
Teddington	2.81	9.25	8.87	50.73	7.63	0.75	0.10	20.03	100.16
Whitton	0.00	0.00	10.46	0.26	2.44	0.00	0.00	5.64	18.81
East Sheen	1.12	0.00	0.00	1.14	0.00	10.92	25.92	9.78	48.89
Barnes	0.00	0.00	0.57	0.00	0.97	1.35	32.77	8.91	44.57
Other LBRuT	4.28	1.79	0.70	9.69	15.47	13.76	0.73	5.16	51.57
LBRuT total	54.56	80.50	56.45	76.09	31.82	58.64	79.85	183.26	621.16
Outflow	15.57	19.01	7.33	11.98	10.33	16.16	23.85		104.22
TOTAL	70.13	99.50	63.78	88.07	42.15	74.80	103.70	183.26	725.38

Source: Tables 3 and 4

Table 10 - Summary of food/beverage expenditure 2021 to 2039 (£M)

Area	2021	2024	2029	2034	2039
Available expenditure					
Richmond	176.56	212.12	236.51	249.57	265.85
Twickenham	60.45	73.12	81.63	85.65	91.30
Teddington	66.47	80.50	89.90	94.14	100.16
Whitton	12.39	15.01	16.86	17.68	18.81
East Sheen	31.39	37.95	43.17	45.88	48.89
Barnes	28.56	34.64	39.51	41.86	44.57
Other LBRuT	34.18	41.16	45.96	48.48	51.57
Total	410.00	494.50	553.54	583.25	621.16
Turnover of existing facilities					
Richmond	176.56	232.01	237.86	243.87	250.03
Twickenham	60.45	79.43	81.43	83.49	85.60
Teddington	66.47	87.35	89.55	91.81	94.13
Whitton	12.39	16.29	16.70	17.12	17.55
East Sheen	31.39	41.24	42.28	43.35	44.44
Barnes	28.56	37.53	38.47	39.45	40.44
Other LBRuT	34.18	44.91	46.04	47.21	48.40
Total	410.00	538.74	552.35	566.29	580.59
Surplus/deficit expenditure £M					
Richmond	0.00	-19.89	-1.35	5.70	15.82
Twickenham	0.00	-6.31	0.19	2.16	5.70
Teddington	0.00	-6.84	0.35	2.33	6.03
Whitton	0.00	-1.27	0.16	0.56	1.26
East Sheen	0.00	-3.29	0.88	2.53	4.45
Barnes	0.00	-2.89	1.03	2.41	4.13
Other LBRuT	0.00	-3.75	-0.08	1.27	3.17
Total	0.00	-44.25	1.19	16.96	40.56

Source: Tables 5 to 9

Table 11 - Food/beverage floorspace capacity up to 2039

	2021	2024	2029	2034	2039
Turnover density new floorspace (£ per sq.m)	£6,000	£6,090	£6,244	£6,402	£6,564
Floorspace projection (sq.m gross)					
Richmond	0	-3,266	-217	891	2,411
Twickenham	0	-1,037	31	337	868
Teddington	0	-1,124	56	363	919
Whitton	0	-209	26	88	192
East Sheen	0	-540	141	395	677
Barnes	0	-474	165	376	629
Other LBRuT	0	-615	-13	199	484
Total	0	-7,265	191	2,649	6,180

Source: Table 10

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