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Richmond upon Thames Retail and Leisure Study Phase 2 Final Report

London Borough of Richmond upon Thames
17 January 2023

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Glossary

Benchmark turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units/premises previously classed as retail or shop uses in the old Use Classes Order (UCO), which are now class E(a) in the new UCO (post September 2020).

Class A2

Commercial units/premises previously classed as financial or professional services, for example banks and building societies within the old UCO, which are now class E (c) in the new UCO.

Class A3

Commercial units/premises previously classed as restaurants and café food outlets in the old UCO, which are now class E (b) in the new UCO.

Class A4

Commercial units/premises previously classed as public houses or bars in the old UCO, which are now Sui Generis (unclassified) in the new UCO.

Class A5

Commercial units previously classed fast as food or takeaway food outlets selling cooked hot food within the old UCO, which are now Sui Generis (unclassified) in the new UCO.

Class E

Units/premises currently classed as commercial, business and services in the new UCO), including shops, restaurants/cafés, financial/professional services, indoor sports/fitness, medical health facilities, creche/nurseries and office/business uses.

Convenience goods

Consumer goods purchased on a regular basis such as food/groceries and cleaning materials.

Comparison goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy widely used for retail and leisure planning information.

Food and Beverage

Previous uses classes A3, A4 and A5 food and drink outlets, selling food and drinks consumed away from the home or hot food takeaway food but not food and grocery items including convenience goods.

GlobalData

A market research and data consultancy widely used for retail planning information, previously Verdict Research.

Goat Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,300 town centres across the UK.

Gross floorspace

Total external floorspace including exterior walls.

Local Data Company

A data consultancy specialising in town centre land use surveys and analysis.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre, destination or shopping/leisure facility.

Multi-channel shopping

Products made available to consumers on more than one sales channel, such as ecommerce websites, brick-and-mortar stores, marketplaces, comparison shopping engines, social media platforms, and other online channels.

Multiplex cinema

A cinema complex with five or more screens.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

Oxford Retail Consultants (ORC)

A data consultancy widely used for retail planning information.

Special forms of trading

Retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales, including on-line sales by supermarkets, department stores and catalogue companies

1.0 **Introduction**

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 This project has been split into two phases. This update report sets out the findings of Phase 2. This Phase 2 report supersedes the Phase 1 report produced in 2021 and provides a more detailed quantitative and qualitative assessment of the need for new retail, leisure and other main town centre uses within LBRuT and policy recommendations. This Phase 2 report adopts the findings of a new household survey undertaken by NEMS Market Research in May 2022.

Report structure

- 1.3 Section 2 of this report provides an updated 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. Appendix 5 provides more detailed centre health checks for the six town centres in LBRuT i.e. the GLA designated centre: Richmond Major centre and the four District centres at East Sheen, Teddington, Twickenham and Whitton. Appendix 6 provides an analysis of local centres distributed throughout the Borough.
- 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 reviews potential implications for future development plan policy taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO) and permitted development rights (PDR).
- 1.8 Section 7 summarises the main conclusions and recommendations

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. Lower levels of growth are likely to continue in the future.
- 2.2 Experian is a data provider most often used in evidence base studies. Experian provides consumer expenditure data and other economic forecasts. 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 (2021 and 2022) for retail and leisure now reflect the expected effects of Brexit and the Covid-19 pandemic. The current cost of living crisis is also likely to suppress expenditure growth in the short term.
- 2.3 The main implications of Brexit, Covid-19 and the cost of living 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 term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.
- 2.4 The key uncertainties relating to the first two points are primarily the length of Covid-19 and the cost of living crisis and recovery period. The longer-term structural implications are harder to predict and quantify at this stage, however there are already signs of a bounce back in terms of expenditure growth, but the cost of living crisis may suppress this bounce back.
- 2.5 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 were the hardest hit. Short-term supply chain disruption led to inflationary pressures, which will have an impact on consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery benefitted 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.
- 2.6 Bearing these trends in mind there has been a spike in town centre vacancies with unfortunately some businesses failing to re-open following the Covid lockdowns, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost of living crisis are likely to exacerbate difficult trading conditions. Many national operators have already announced job losses and store closures.
- 2.7 Brexit and Covid-19 could have short-term impacts 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 in 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. **This study has adopted the GLA's latest 2020 based housing led population projections.** The latest 2021 Census figures will not have a significant **impact on the GLA's population** projections for LBRuT.

- 2.8 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, the period between lockdowns (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 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. After January 2021, sales had recovered to 9% above pre-Covid levels by April 2021. The seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.
- 2.9 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales 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 low point during March to November 2020.
- 2.10 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.
- 2.11 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.
- 2.12 These on-line shopping national trends have been reflected in LBRuT. The household survey results undertaken in May 2022 suggest over 30% of respondents do most of their household's non-food shopping on-line. The household survey results indicate that 20.3% of households did their last main food and grocery shop via the internet/delivery.
- 2.13 **Experian's Retail Planner Briefing Note (January 2022) suggests non-store retailing's** market share increased from 20.5% in 2019 to 30.2% in 2021. Comparison non-store sales increased from 24.3% to 35.5% and convenience good sales increased from 13.7% to 20.9%. However, Experian expect these figures will fall during 2022 i.e. 31.9% for comparison goods sales and 19.1% for convenience good sales. Nevertheless, the 2022 figures remain significantly higher than pre-Covid market shares in 2019.
- 2.14 Respondents to the household survey (May 2022) were asked how frequently they shop online now compared to when before the Covid pandemic started in early 2020. These results suggest 41.6% of respondents now do online shopping more frequently and only 8.5% do so less frequently. The net change suggests 33% are doing online shopping more often. This uplift is consistent with Experian projected uplift between 2019 and 2022, described above.

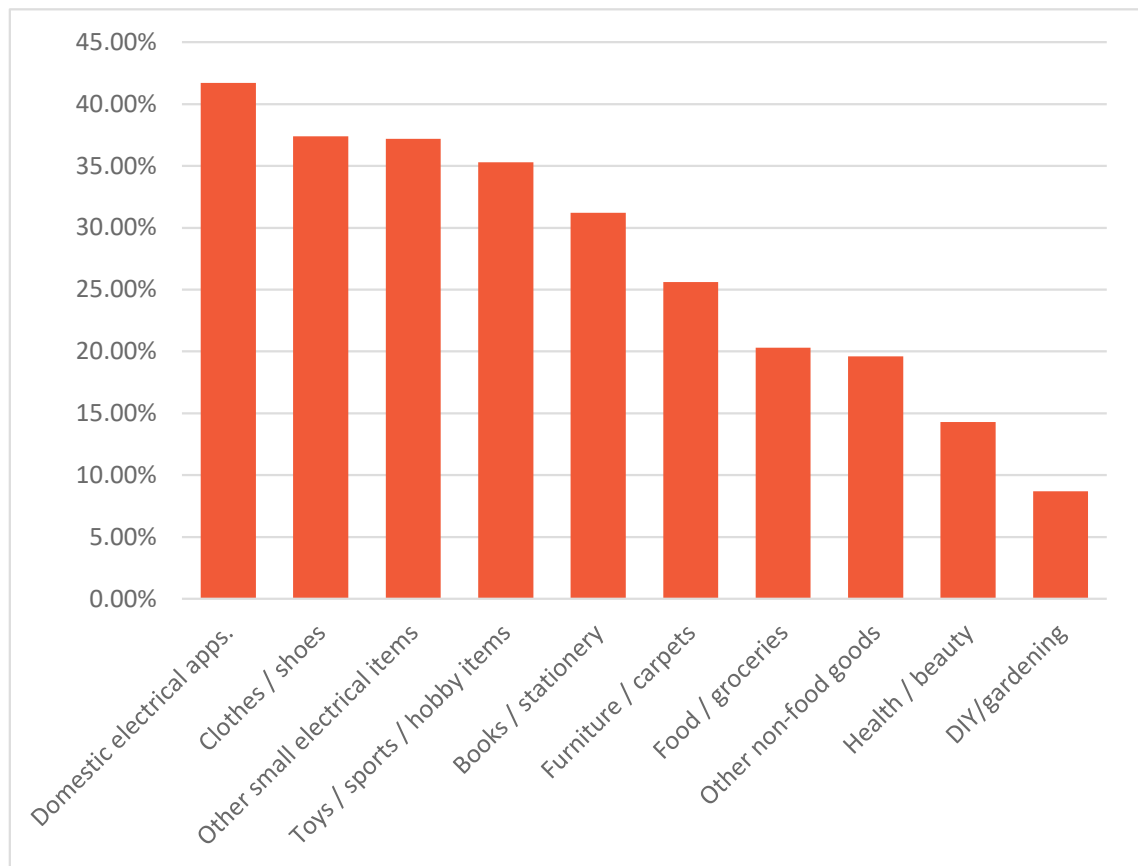
- 2.15 It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing.
- 2.16 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth when compared with historic trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer term forecasts should be monitored and kept under review.

Long-term expenditure trends

- 2.17 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.
- 2.18 For convenience goods, Experian's latest forecasts (January 2022) suggest a 2% reduction in expenditure per capita during 2022 and then limited growth thereafter (0.1% per annum). Experian expects slow expenditure growth and most of this growth will relate to non-store sales. Any need for new convenience goods retail floorspace in LBRuT is likely to relate to population growth, high levels of trading or qualitative areas of deficiency.
- 2.19 For comparison goods expenditure, higher levels of growth are expected in the future (between 2.8% to 2.9% per annum), but still at a lower rate than previous historic 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.
- 2.20 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 19 (January 2022) states:
- "After having eased in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting above 30% in 2025. The pace of e-commerce is anticipated to moderate over the longer term, reaching 36.5% of total retail sales by 2040."*
- 2.21 The floorspace capacity assessment in this study update makes an allowance for future growth in e-tailing based on Experian's latest 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 and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

- 2.22 The household survey results indicate many households regularly buy items from the internet for home delivery. Nearly 31% of respondents do most of their non-food shopping on-line. The main products purchased by households online are shown in Figure 2.1.
- 2.23 These results indicate that a wide range of goods are purchased on-line. Electrical goods and clothing/shoes are most often purchased online.
- 2.24 The household survey results indicate that 20.3% of households did their last main food and grocery shop via the internet/delivery.

Figure 2.1 Items purchased online (% of respondents)

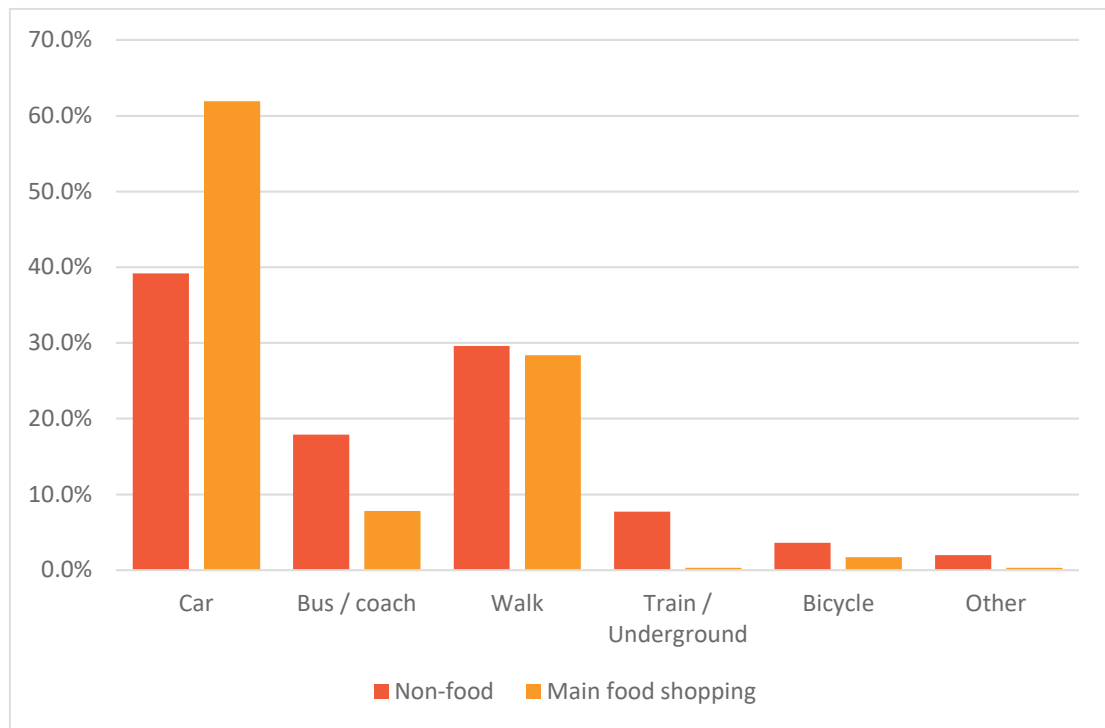


Source: NEMS household telephone survey results May 2022

Mode of travel and frequency of trips

- 2.25 As indicated above, 31% of respondents do most of their non-food shopping on-line and 20.3% did their last main food and grocery shop via the internet/delivery. Experian suggests over 27% of retail sales is via non-store activity. These figures suggest many households do not need to travel to undertake food and non-food shopping.
- 2.26 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 2.2.

Figure 2.2 Mode of travel for non-food and main food shopping (% of travelling household respondents)



Source: NEMS household telephone survey results May 2022

2.27 Shopping by car (driver or passenger) is still the most popular mode of travel for both non-food and main food shopping trips but, relatively high proportions of customers use public transport or walk to shop for both food and non-food shopping.

2.28 Car travel for food and non-food shopping was highest in the west of the Borough i.e. Zone 3 (Whitton) and Zone 5 (Hampton), as shown in Figure 2.3.

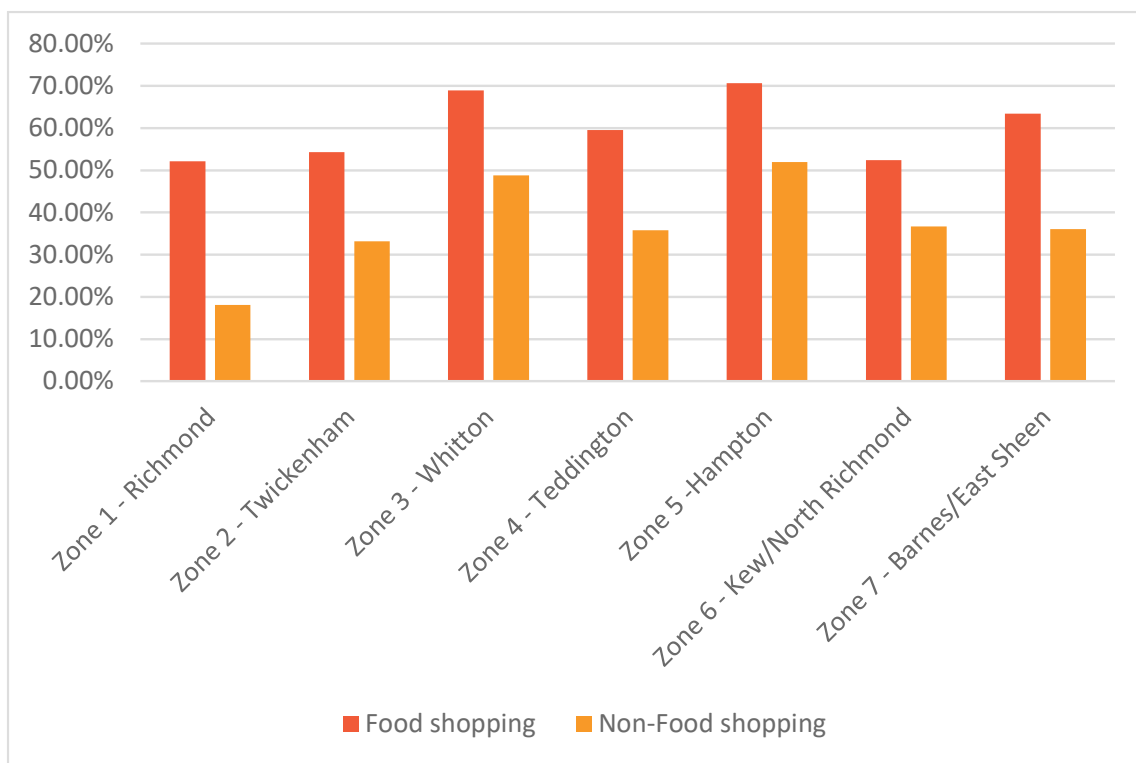
2.29 Car usage for shopping was generally lower in the Richmond and Twickenham areas. This variation may be due higher levels of access to shopping facilities on foot and public transport in the central area of the Borough and lower levels of access in the west. For food and grocery shopping car usage varied less between zones than non-food shopping.

2.30 **Based on Lichfields’** recent experience, car usage is lower within major cities and higher in rural areas i.e. normally over 80% of households for main weekly shopping. Within London car usage is generally much lower. A comparison with similar household surveys in selected parts of London suggest the following levels of car travel for shopping:

- Richmond upon Thames - main food (62%) and non-food (39%)
- Haringey - main food (53%) and non-food (42%)
- Barking and Dagenham - main food (65%) and non-food (56%)
- Enfield - main food (64%) and non-food (48%)
- Southwark - main food (48%) and non-food (32%)
- Wandsworth - main food (44%) and non-food (31%)

2.31 These results suggest car usage for both main food and non-food shopping in LBRuT is broadly similar when compared with other outer London Boroughs, but higher than inner London Boroughs.

Figure 2.3 Car borne travel for non-food and main food shopping by Zone (% of travelling household respondents)



Source: NEMS household telephone survey results May 2022

2.32 Car usage is generally higher for main food shopping than for non-food shopping because many households undertake bulk food and grocery shopping once a week or less often. The household survey suggests, on average, each household undertakes main food and grocery shopping trips 1.3 times per week, with the majority (58%) undertaking one weekly trip.

2.33 Non-food shopping trips are generally undertaken less often, with an average of just under one trip per week.

2.34 Bus and train/underground usage is slightly higher for non-food shopping, which may reflect more non-food shopping trips made to destinations outside the Borough e.g. Central London.

Demand for town centre floorspace

2.35 In the past lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector have had an impact on the high street. 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 14.7% in 2021. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, Brexit and the growth in on-line shopping. The more recent impact of higher inflation and the cost of living crisis is also likely to constrain consumer demand, which may affect the demand for floorspace at least in the short term.

2.36 **LBRuT's Town Centre Land Use Survey March 2021 indicated** the number of vacant units within town, local and neighbourhood centres and all frontages across the Borough was 220 and the average vacancy rate was 8.9%. This vacancy rate is lower than the UK pre-Covid-19 average (12.4%) and below the current post-Covid national average (14.7%).

- 2.37 **LBRuT's land use surveys suggest the number of vacant units fell from 195 in 2012 to 133 in 2016**, a vacancy rate of only 5.5%. However, the number of vacant units has increased steadily since 2016 reaching 220 vacant units in the latest land use survey. The number of vacant units in LBRuT has increased by 52 units since 2014, the time of the last retail study. This increase is consistent with national trends and is primarily due to the reduction of comparison goods retail outlets.
- 2.38 The national decline in the number of comparison goods retail outlets within town centres **has been evident in LBRuT's town centres. The Council's latest 2021** land use survey suggests the number of comparison goods shops is 619 outlets, less than 28% of all shop/service units. The number of food/beverage and non-retail service uses was 1,128 outlets, over 50% of all shop units. In most centres, non-retail services have helped to replace lost comparison goods outlets.
- 2.39 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through a 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 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 Covid-19 pandemic and the cost of living crisis, at least in the short-term.
- 2.40 Whilst the CVA process has created difficulties 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
- 2.41 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).
- 2.42 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.
- 2.43 Several proposed larger food superstores have 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. This trend may have increased with more home working during the pandemic lockdowns, but may move back to pre-Covid levels in the future.
- 2.44 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 the discount food sector has been lower than in other London Boroughs, perhaps due to the absence of suitable sites/premises.

Comparison retailers

- 2.45 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.
- 2.46 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 some retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This trend has also led to the relocation of retailers to out of centre locations, 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.
- 2.47 In London there have been many proposals to redevelop low density retail warehouse sites for higher density mixed use developments, usually residential led. The retail warehouse sector is reasonably well 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.
- 2.48 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 at East Sheen and nearby in Wandsworth has recently been subject to redevelopment proposals.
- 2.49 In general, operator demand for space has decreased significantly during the last 5 years and, of those national multiples looking for space, many prefer to locate in larger centres e.g. Kingston town centre. 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 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.
- 2.50 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 town 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

- 2.51 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 other vacated shop premises during previous recessions. This trend is

evident in LBRuT with a strong presence of charity shops in most centres. There are 46 charity shops within the Borough, 7.4% of all comparison shops.

- 2.52 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.

Non-retail services

- 2.53 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 hot food 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.

- 2.54 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 relatively low proportions of betting shops, lending/pay day loan and takeaways when compared with the national average.

- 2.55 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, which may have been suppressed by the Covid pandemic. The impact of these changes will need to be carefully monitored. The cost of living crisis may increase demand for change from retail to other uses.

The evening economy

- 2.56 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.

- 2.57 Recently restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants 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.

- 2.58 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.

2.59 The proportion of non-retail uses within town centres across the country increased significantly before the Covid crisis. This trend was evident in LBRuT, and this sector appears to have recovered well following the Covid-19 crisis.

Pop-up spaces

2.60 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 to test and learn before committing to permanent stores. This trend may increase following the Covid-19 crisis.

National policy and other changes

2.61 The revised NPPF was replaced by an amended version in July 2021. 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.

- 2.62 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'.
- 2.63 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. Covid-19 and cost of living 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 can extend activity throughout the daytime and into the evenings.
- 2.64 In 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.
- 2.65 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).
- 2.66 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.
- 2.67 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.
- 2.68 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.
- 2.69 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 no flexibility for Class A4 and A5 uses. Many Class A3 restaurants 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 2021 land use survey has re-categorised existing uses within town centres to reflect the new**

UCO, which is helpful when considering appropriate policy options and change of use planning applications.

- 2.70 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.
- 2.71 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 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.
- 2.72 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.
- 2.73 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.
- 2.74 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.
- 2.75 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 are 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 previous Class M PD right falls away.
- 2.76 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, now benefit from the Class MA PD rights.
- 2.77 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.

- 2.78 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. A key change arising from Class MA is the loss of a prior approval matter considering the impact of the loss of retail.
- 2.79 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.
- 2.80 The requirement to meet space standards in relevant prior approval applications came into force in April 2021. 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.
- 2.81 The Council made a non-immediate Article 4 Direction which was confirmed by the Environment, Sustainability, Culture & Sports Committee on 21 June 2022. Subsequently, this Direction was modified by the Secretary of State and came into force on 29 July 2022. It covers 62 areas across the borough where the main concentrations of commercial and business uses are located including town, local and neighbourhood centres and most local parades. 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

- 2.82 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.
- 2.83 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 Goald national shop vacancy rate has increased to over 14% and therefore a cautious approach to future growth is required. The implications of the cost of living crisis also endorse a cautious approach.
- 2.84 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 town 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 four Metropolitan Centres i.e. Croydon, Ealing, Hounslow and Kingston. Richmond town centre is the highest tiered centre in LBRuT. Richmond town centre along with Chiswick, Putney, Wandsworth and Wimbledon are third-tier Major Centres. LBRuT has four District Centres at East Sheen, Teddington, Twickenham and Whitton.

Figure 3.1 London's town centre network



Source: GLA London Plan (2021)

Town Centre Network

-  International
-  Metropolitan
-  Major
-  District
-  CAZ

- 3.2 The London Plan indicates Metropolitan Centres serve wide catchment areas covering several boroughs, whilst Major Centres including Richmond may have smaller catchment areas. District Centres are smaller with 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 household survey results confirm Richmond town centre has a borough-wide catchment area, whilst the other centres have more localised catchment areas.
- 3.3 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.
- 3.4 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 but 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 relate to smaller Goad Plan area rather than Local Plan designated centre boundaries.

Designated Centres in LBRuT

3.5 Designated centres and parades in the LBRuT are summarised in Table 3.2, based on the Council's latest land use survey in 2021. 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 50 units, whilst Local Parades have between 5 to 40 units.

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

Centre	Total retail units	Comparison goods retail	Convenience goods retail	Food/beverage	Other	Vacant units
Major centre						
Richmond	344	116	26	75	84	43
District centres						
Twickenham	276	70	33	71	82	20
East Sheen	275	92	24	53	73	33
Teddington	178	56	16	42	49	14
Whitton	125	34	17	25	39	10
Local centres						
Barnes	116	34	18	21	33	10
Hampton Hill	104	25	9	22	31	17
Hampton Village	74	18	9	12	28	7
East Twickenham	69	23	5	11	23	7
St Margarets	59	13	10	13	19	4
Kew Gardens	45	11	9	12	10	2
Ham Parade	39	11	9	6	13	0
Neighbourhood centres						
White Hart Lane	50	9	5	9	23	4
Hampton Wick	44	7	2	11	15	9
Stanley Road	39	16	3	8	11	1
Sheen Road	35	12	4	5	11	3
Heathside	33	6	7	7	9	4
Castelnau	23	2	5	8	5	3
Friars Stile Road	19	5	4	5	4	1
Kingston Road	18	6	4	5	3	0
Local parades						
Twickenham Green	37	5	4	13	12	3
Kew Road	32	5	3	11	10	3
Sandycombe Road	31	10	2	8	10	2
Kew Green	18	5	2	5	5	1
Lower Mortlake Road	17	6	2	2	4	3
Ham Street/Back Lane	15	2	2	5	3	3
Waldegrave Road	14	4	2	3	4	1
Whitton Road	13	0	6	3	2	2
Strawberry Hill	13	2	3	2	6	0
Fulwell	11	1	2	3	2	3
Nelson Road	11	0	2	3	5	1
St Margarets Road	9	1	2	2	2	2
Ashburnham Road	8	1	3	2	0	2
Hampton Nursery Lands	7	1	2	1	2	1
Hospital Bridge Road	5	2	3	0	0	0

Source: LBRuT Centre Land Use Survey March 2021

Relative attraction of centres

- 3.6 **The Javelin Group's Venuescore** ranked over 3,500 retail destinations in the UK including town centres, malls, retail warehouse parks and factory outlet centres across the country in 2017. This information has not been updated since 2017, but still provides a useful comparative analysis.
- 3.7 Each destination was 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.

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 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 much higher than their relative Venuescore suggests. Javelin also assessed the market position of the larger town centres

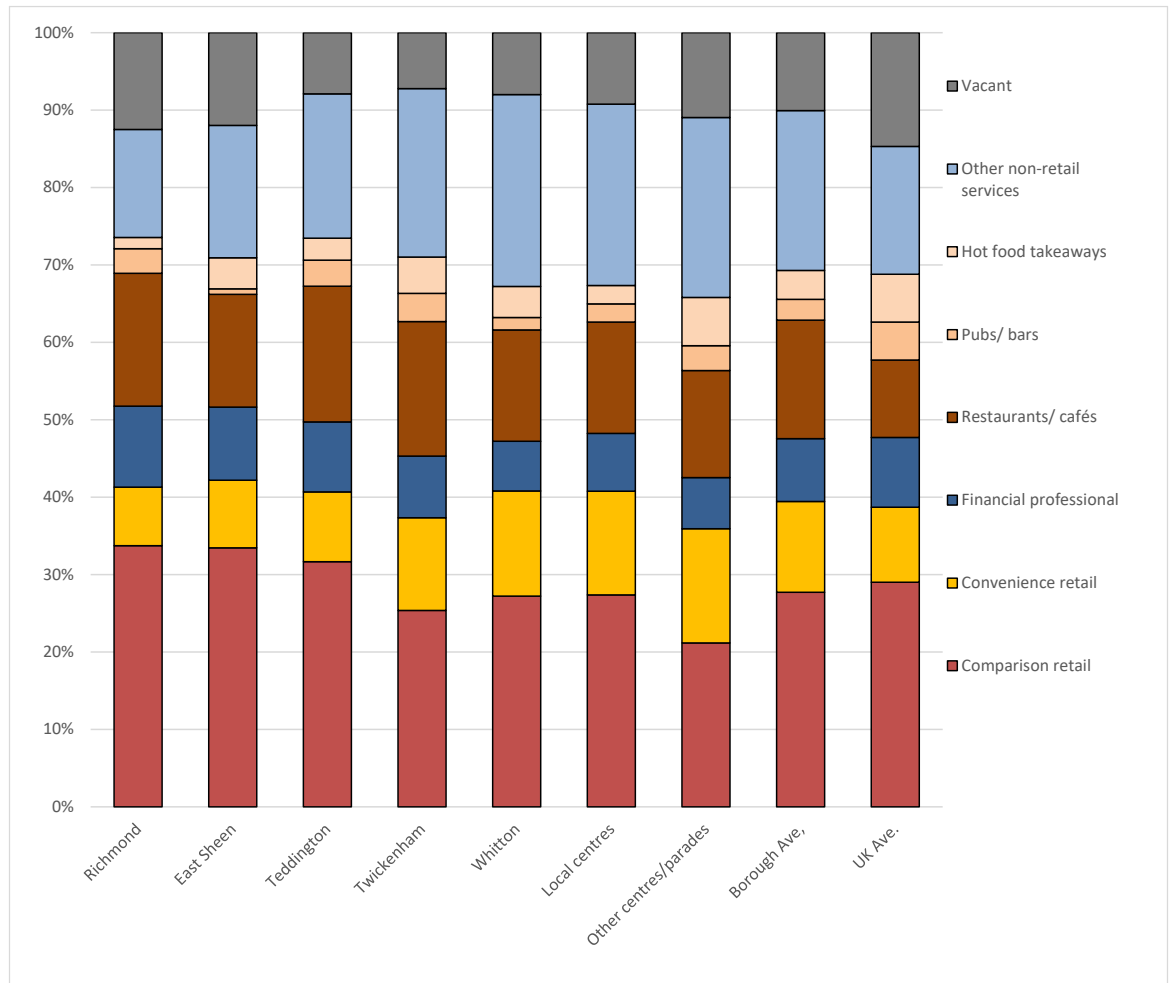
based on the retailers present and the centre's relative position along a spectrum running from discount to luxury (i.e. lower, middle to upscale).

- 3.9 This Javelin information was used in the retail industry to assess the relative strength of shopping destinations. Javelin also assessed 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 was the key driver in the relative attraction of large comparison shopping destinations. The Venuescore data was weighted towards clothing and fashion retailing. Clothing/fashion shopping facilities were, and still are, primarily focused within the larger centres.
- 3.10 Consistent with the London Plan, the Javelin index ranked Richmond town centre as the main centre within the Borough. Other centres in LBRuT featured much lower in the rankings and achieved relatively low scores. Central London, Kingston, Croydon and Westfield were ranked at the top of the hierarchy. Other GLA Major Centres including Richmond, Kings Road, Kensington High Street, Wimbledon and Wandsworth and were all ranked within the top 200, their scores reflected the higher number of national multiple retailers present in 2017.
- 3.11 The top ranked centres also had the higher market positions, with a focus on luxury rather than discount products. Richmond was considered to have an upscale market position, along with Westfields and Kings Road. Barnes, East Sheen and Teddington were considered upper middle market by Javelin, whilst Twickenham was middle market.
- 3.12 Overall, the Javelin 2017 analysis suggested centres within LBRuT had a good choice of clothes/fashion shops, including independent shops and multiples. Most centres have a relatively high market position reflecting the socio-economic characteristics of the Borough.

Diversity of main town centre uses

- 3.13 Figure 3.2 below shows the composition of the five town centres in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the Borough and Goad Plan average mix for all centres across the UK. More detail is provided in the health check analysis in Appendix 5.
- 3.14 The centres have a good mix of retail and service uses, but Twickenham has lower proportion of comparison goods retail units than the national average, perhaps reflecting its unique position near the national rugby stadium. However, Twickenham still has a reasonable choice of comparison goods shops, including some relatively large stores. All the town centres except Richmond have a reasonably high proportion of convenience goods retail and non-retail services. The food/beverage offer is reasonably strong in all the town centres, particularly café/restaurant uses.
- 3.15 Vacancy rates in the Borough are lower than the current UK average (14.7%). Richmond and East Sheen and have the highest vacancy rates (12.5% and 12% respectively), but still marginally below the national average. **LBRuT's Town Centre Land Use Survey March 2021** suggests the vacancy rate increased from 8.1% in 2019 to 8.9% in 2021, which may be due to the impact of Covid-19 lockdowns. At present there is no evidence of a significant post Covid spike in shop vacancy rates.

Figure 3.2 Mix of retail and service uses



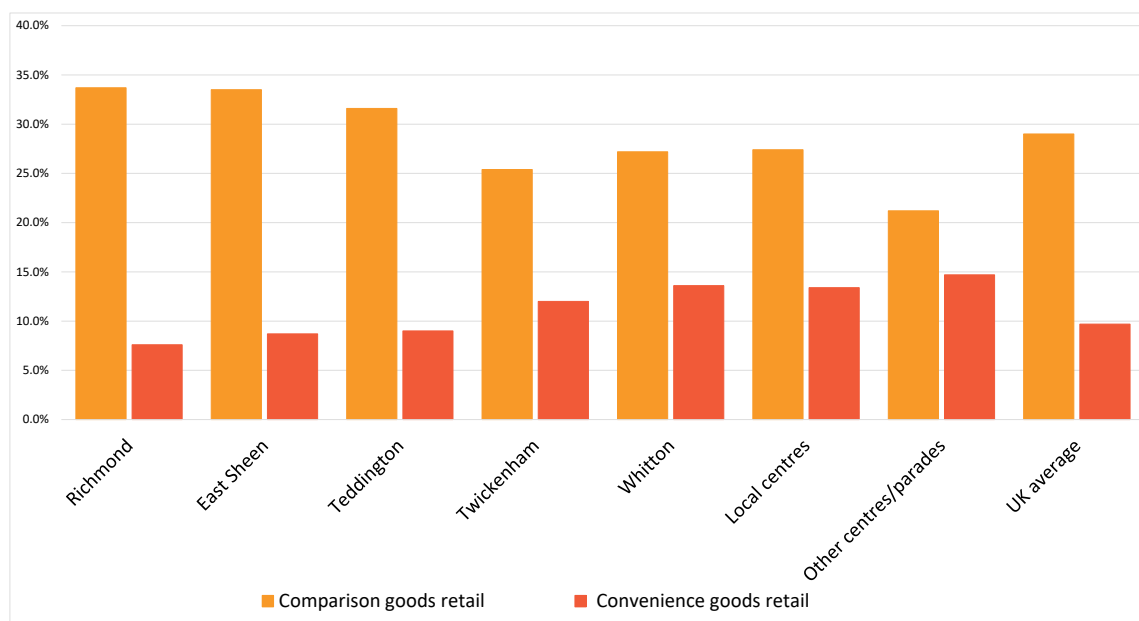
Source: LBRuT Council’s land uses survey 2021 and Experian Goad Plans UK average.

Retailer representation

3.16 Figure 3.3 compares the proportion of convenience and comparison retail units within centres compared with the national average.

3.17 Most centres have a similar or higher proportion of convenience goods units when compared with the national average. Convenience goods representation is particularly strong in Twickenham and Whitton. Conversely comparison goods retail is lower than average in these two centres. Richmond and East Sheen have a high proportion of comparison goods retail uses when compared with the national average, but many of the shop units are relatively small (less than 100 sq.m gross).

Figure 3.3 Proportion of comparison and convenience retail (% total units)



Source: LBRuT Council’s land uses survey 2021 and Experian Goad Plans UK average.

3.18 Generally, larger centres have a higher proportion of comparison shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services, catering for the day to day needs of **their local catchment area. This is reflected in LBRuT’s** local and neighbourhood centres and parades. Convenience goods retail and non-retail services perform an important role in the local centres and parades, serving relatively localised needs.

Service Uses

3.19 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. This local role increased in the London suburbs during the Covid lockdowns.

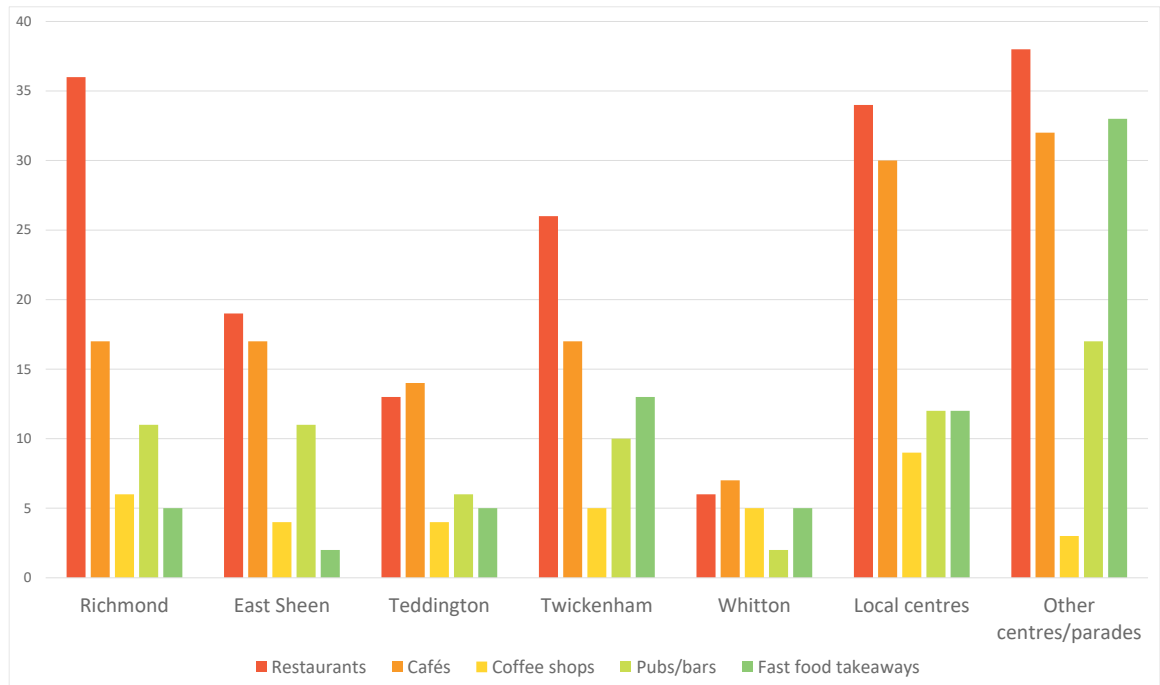
3.20 Figures 3.4 and 3.5 below summarise the number and proportion of units in different service categories. The service uses are categorised as follows:

- Financial and professional services including banks, building societies, financial services, estate agents and employment agencies.
- Food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways.
- Other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

3.21 The number of food/beverage outlets available in centres and parades is examined in more detail in Figure 3.4. Most of the town centres, except Whitton, have a good mix of food/beverage outlets serving both the daytime and evening economies. However, these centres have a varied provision of food/beverage outlets serving either the daytime or evening economies. Richmond, East Sheen and Twickenham appear to have the strongest provision of outlets serving the evening economy i.e. restaurants (rather than cafés and coffee shops) and pubs/bars.

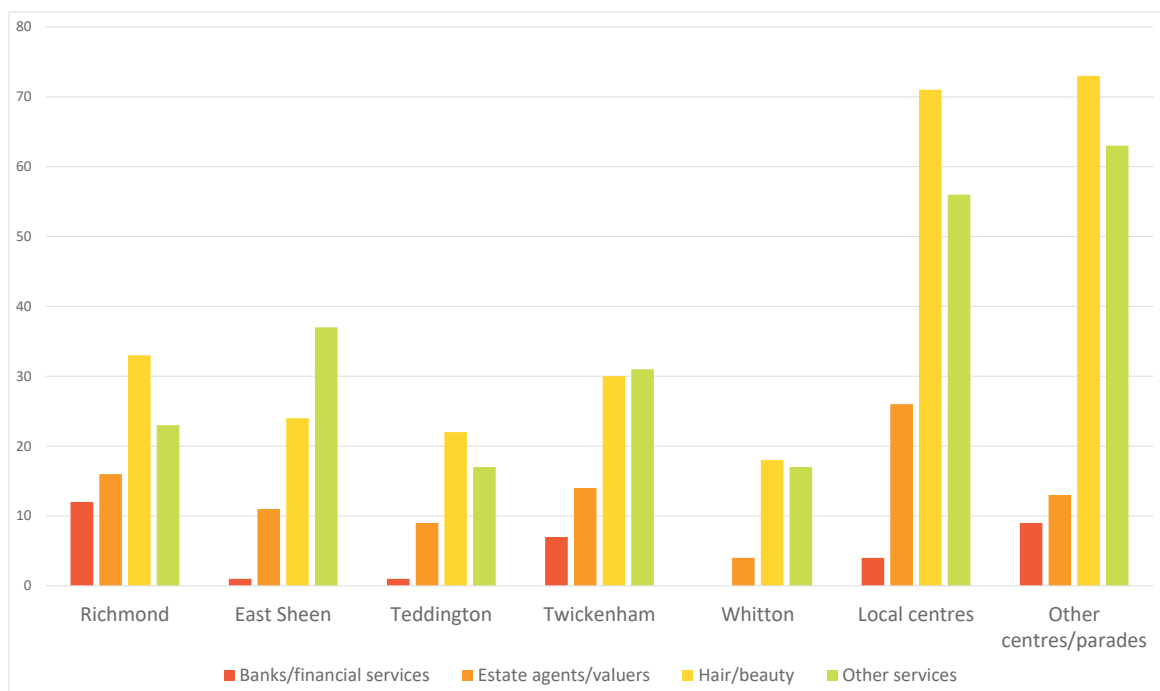
3.22 Local centres, neighbourhood centres and parades also provide a wide choice of food/beverage outlets. The majority of LBRuT’s hot food takeaways are in the smaller local centres/parades.

Figure 3.4 Distribution of food/beverage outlets (number of outlets)



Source: LBRuT Council’s land uses survey 2021.

Figure 3.5 Distribution of other non-retail service uses (number of outlets)



Source: LBRuT Council’s land uses survey 2021

3.23 Banks and financial services are concentrated in Richmond and Twickenham town centres. All the town centres have a reasonable choice of other services, particularly hair/beauty salons. Local centres, neighbourhood centres and parades also provide a wide choice of non-retail services. **The majority of LBRuT's hair/beauty salon and beauty salons are in the smaller centres/parades.** As shown in Figure 3.5, East Sheen, Twickenham, local/neighbourhood centres and parades have many other services e.g. dry cleaners, launderettes, funeral directors, car repairs etc.

Summary

3.24 The analysis of the hierarchy of centres in this section indicates LBRuT has a well-established network of centres and parades that currently serve their respective areas. Richmond town centre is the only centre with a truly borough-wide catchment area. The health of the town centres is assessed in more detail in Appendix 5.

3.25 The town centre vacancy rate has increased but in most centres is still below or comparable with the national average. Continuing to identify the hierarchy of centres in future development plans is important in terms of:

- ensuring the vitality and viability of centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable role and strategy for each centre.

3.26 The network of centres 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.

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 2020 prices, consistent with Experian's base year expenditure figures for 2020, which are based on actual recorded expenditure levels rather than projections.

Study area zones and population

4.4 A household telephone survey was previously undertaken 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. A new household survey has been undertaken during May 2022.

4.5 The projected population within each zone between 2022 to 2039 is set out in Table 1 in Appendix 2, based on the GLA's **latest 2020**-base projections for wards (housing trajectory projections). The base year 2022 population within LBRuT is 197,406. This population is projected to increase to 198,770 by 2039, an increase of only 0.7%.

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 2020 have been obtained.

4.7 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 19 – January 2022) has been used to forecast expenditure within LBRuT. Experian's short term EBS growth forecast rates during 2021, 2022 and 2023 reflect current economic circumstances, including the Covid-19 crisis. The forecast changes during this period are as follows:

- convenience goods: -5.5%;
- comparison goods: +7.0%;
- leisure: +52.8%.

4.8 These short-term forecasts reflect post Covid lockdown re-adjustments. Convenience goods expenditure increased during the lockdowns with households eating out less often than before the pandemic. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns, but these sectors are expected to recover during 2022 and 2023.

- 4.9 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: +0.1% per annum growth for 2024 and beyond;
 - comparison goods: +2.8% per annum growth for 2024 to 2028 and +2.9% per annum after 2028; and
 - leisure: +1.1% per annum growth for 2024 to 2028 and +0.9% per annum after 2028.
- 4.10 These growth figures relate to real growth and exclude inflation.
- 4.11 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2022 are:
- 5.7% of convenience goods expenditure; and
 - 23.9% of comparison goods expenditure.
- 4.12 Experian's projections suggest that these percentages will increase to 6.3% and 25.4% by 2024, respectively. The long-term Experian projections suggest an increase to 7.7% and 30.1% by 2039, respectively.
- 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 2039, 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 forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within LBRuT is forecast to increase by only +0.3% from £615.03 million in 2022 to £617.68 million in 2039, as shown in Table 3 (Appendix 2).
- 4.15 Comparison goods spending is forecast to increase by +50% between 2022 and 2039, increasing from £789.89 million in 2022 to £1,184.53 million in 2039, as shown in Table 3 (Appendix 3).
- 4.16 Food and beverage spending is forecast to increase by +19% between 2022 and 2039, increasing from £491.69 million in 2022 to £584.43 million in 2039, as shown in Table 3 (Appendix 4).

Growth in turnover densities

- 4.17 Experian's Retail Planner Briefing Note 19, January 2021 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +2.3% during 2023, and further growth is envisaged in the medium term (+2.2% per annum during 2024 to 2028), and longer term (+2.6% per annum beyond 2028). 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.
- 4.18 For convenience goods retail, Experian indicates a 1.6% increase in sales densities during 2023; a small average increase of 0.1% per annum during 2024 to 2028; and no predicted growth in sales densities thereafter.
- 4.19 Experian does not provide projections for food and beverage sales densities. Future growth is assumed in line with leisure expenditure growth. Future growth reflects the necessary

period of recovery required in this sector following the Covid-19 pandemic. An average growth rate of 0.5% per annum has been adopted.

Base year market shares

- 4.20 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 have been estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in May 2022.
- 4.21 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.
- 4.22 The household survey results suggest a high level (nearly 81%) of expenditure retention within the study area for convenience goods shopping. The retention of comparison goods expenditure is much lower (about 47% in the study area) due to the draw of larger centres outside LBRuT, primarily in Kingston upon Thames and Central London. The retention of food/beverage expenditure is similar to convenience goods shopping at over 75% retention in the study area.
- 4.23 The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 2 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind. The survey results suggest reasonably high levels (nearly 81%) of convenience goods expenditure retention within the study area, as shown in Table 4.1. These figures indicate that most residents tend to undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips.

Table 4.1 Food and grocery trip retention in LB Richmond upon Thames (% of all trips in zones)

Zone	Main	Top-up	Combined market share
Zone 1 – Richmond	72.0	84.3	75.7
Zone 2 – Twickenham	74.5	92.1	79.8
Zone 3 – Whitton	62.3	85.6	69.3
Zone 4 – Teddington	76.9	93.5	81.9
Zone 5 – Hampton	88.2	98.7	91.4
Zone 6 – Kew/North Richmond	93.0	93.9	93.3
Zone 7 – Barnes/East Sheen	73.7	88.3	78.1

Source: NEMS household survey results May 2022

- 4.24 The main food and grocery destinations were as follows (combined % market share of main food trips within all study area zones):
 - 1 Tesco Extra, Twickenham/Isleworth 9.6%
 - 2 **Sainsbury’s, Lower Richmond Road, Richmond** 9.2%
 - 3 **Sainsbury’s, Hampton Hill** 8.3%
 - 4 Waitrose, East Sheen 7.4%

5	Waitrose, Twickenham	7.4%
6	Lidl, Fulwell, Twickenham	6.5%
7	Waitrose, Sheen Road, Richmond	6.0%
8	Tesco, Broad Street, Teddington	5.1%
9	Sainsbury’s, Tangle Park Road, Hampton	3.3%
10	Lidl, Richmond Road, East Twickenham	3.3%

4.25 The market shares for comparison goods shopping in Table 4, Appendix 3 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower, but still reasonable levels of comparison goods expenditure retention for all goods categories within most study area zones, as shown in Table 4.2.

Table 4.2 Non-food comparison trip retention (% of all trips in study area zones – excluding internet shopping)

Goods category	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Clothing and footwear	47.9	51.2	21.2	13.9	7.8	55.7	47.6
Domestic electric appliances	31.3	41.8	55.7	35.0	48.9	43.5	47.9
Other electrical goods	17.2	22.6	36.0	16.0	30.0	6.8	24.6
Furniture, floor-coverings, household textiles	16.3	31.4	17.2	29.5	21.6	38.4	31.4
DIY / hardware and garden items	65.3	72.4	57.1	67.9	54.8	93.3	75.9
Health and beauty items	51.5	89.9	73.6	69.3	49.5	96.7	76.8
Books and stationery	54.1	89.1	61.6	59.4	36.3	100.0	87.1
Games, toys, sports, hobby items, pet products	33.7	70.3	47.4	49.4	35.5	91.1	79.6
Other non-food	22.8	30.6	22.8	19.7	17.7	57.6	35.0
Combined market share	37.0	55.8	40.0	37.4	29.8	65.7	56.2

Source: NEMS household survey results May 2022

4.26 The lowest levels of comparison goods expenditure retention (highest leakage or outflow) is from the south and west of LBRuT, where leakage to Kingston Upon Thames is high. Leakage is relatively high across all zones (35% to 70%), with the highest proportional retention is in the north and east of LBRuT.

4.27 The survey results suggest good levels of expenditure retention for lower order comparison goods, such as DIY/hardware, health/beauty and books/stationery, but lower levels of retention for higher order goods, such as clothes, furniture and electrical goods.

4.28 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 4 are a combined rate for both eating out and drinking at pubs/bars are based on a 75:25 split. This 75:25 split is based on Lichfields' experience across the country.

4.29 The survey results also suggest reasonable levels of food/beverage expenditure retention across all parts of LBRuT for both eating and drinking, as shown in Table 4.3.

Table 4.3 Food and beverage trip retention (% of all trips in zones)

Zone	Eating out	Drinking away from home	Combined market share
Zone 1 – Richmond	72.5	70.2	72.0
Zone 2 – Twickenham	84.5	85.7	84.7
Zone 3 – Whitton	75.3	69.3	74.1
Zone 4 – Teddington	74.3	75.5	74.5
Zone 5 – Hampton	78.8	82.3	79.5
Zone 6 – Kew/North Richmond	57.0	80.7	61.8
Zone 7 – Barnes/East Sheen	78.1	80.7	78.6

Source: NEMS household survey results May 2022

Capacity for convenience goods retail floorspace

4.30

Based on the market shares calculated from the May 2022 household survey results, available convenience goods expenditure attracted to LBRuT in 2022 is shown in Table 4 in Appendix 2. This has been projected forward to 2024, 2029, 2034 and 2039, and is summarised in Table 10 in Appendix 2. Convenience goods expenditure available to facilities within LBRuT is expected to increase from £581.34 million in 2022 to £584.92 million in 2039. 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 4.4.

Table 4.4 Convenience goods base year turnover in 2022

	Turnover £M
Zone 1 - Richmond	£166.99
Zone 2 - Twickenham	£155.22
Zone 3 - Whitton	£16.70
Zone 4 - Teddington	£53.32
Zone 5 - Hampton/Hampton Hill	£83.39
Zone 6 - Kew/North Richmond	£23.53
Zone 7 – Barnes/East Sheen	£82.18
Total	581.34

Source: Table 10 in Appendix 2

4.31

Table 10 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 -£9.45 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 increase to -£14.45 million at 2029. Continued population growth reduces the deficit to -£13.3 million by 2034 and to -£8.68 million by 2039. These projections suggest there is no capacity for additional convenience goods facilities over the plan period. There is a projected over-supply of convenience goods retail floorspace for the foreseeable future.

4.32 The deficit 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 4.5.

Table 4.5 Convenience goods floorspace capacity (sq.m gross) - cumulative

Zone	2024	2029	2034	2039
Zone 1 – Richmond	-351	-488	-120	177
Zone 2 – Twickenham	-282	-548	-784	-824
Zone 3 – Whitton	-36	-65	-90	-87
Zone 4 – Teddington	-99	-175	-263	-60
Zone 5 – Hampton	-166	-313	-438	-355
Zone 6 – Kew/North Richmond	-48	-34	95	133
Zone 7 – Barnes/East Sheen	-124	-62	50	4
Total	-1,106	-1,684	-1,550	-1,011

Source: Table 11, Appendix 2

4.33 The deficit expenditure projections up to 2029 imply a combined over-supply of convenience goods floorspace in LBRuT of 1,684 sq.m gross in 2029, but long-term growth suggests a smaller over-supply of 1,011 sq.m gross in 2039.

4.34 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 projections are now negative due to lower population and expenditure growth and a higher proportion of home shopping expenditure.

Qualitative need

4.35 Collectively the town, local and neighbourhood centres and parades within LBRuT have 262 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, which reflects the high expenditure retention rates highlighted in Table 4.1.

4.36 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 (St Clares), Hampton Hill and Lower Richmond Road (Manor Road). Tesco Extra at Isleworth is just outside LBRuT, but also serves the Twickenham and **St Margaret’s areas.**

4.37 In addition to these superstores, there is good choice of other large stores/supermarkets and smaller convenience stores within LBRuT. There are seven large food stores (1,000 to 2,000 sq.m net) including three Waitrose stores. The discount food sector is represented by Lidl stores at East Twickenham and Fulwell, Twickenham. There are also:

- 13 Tesco stores (2 Metro and 11 Tesco Express stores);
- **9 Sainsbury’s Local;** and
- 7 Marks & Spencer Simply Food/food halls.

- 4.38 As indicated in Section 3, all town centres, except Richmond, have a reasonably high proportion of convenience good retail uses. Convenience goods representation is particularly strong in Twickenham and Whitton town centres as shown in Figure 3.3. The analysis of local centres in Appendix 6 indicates most local centres have at least one convenience goods store. Many centres also have newsagents and/or an off licence.
- 4.39 There are no obvious areas of deficiency in food store or convenience goods provision in LBRuT.

Capacity for comparison goods floorspace

- 4.40 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 £484.34 million in 2022 to over £728.30 million by 2039.
- 4.41 Table 10 in Appendix 3 subtracts the turnover of existing floorspace including an allowance for growth in turnover densities. 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.
- 4.42 By 2024 there is a projected small expenditure deficit of -£1.84 million, which will increase to -£7.64 million by 2029 but this will increase only marginally to -£9.41 million in 2034 and then reducing to -£4.35 million 2039. 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 4.6.

Table 4.6 Comparison goods floorspace capacity (sq.m gross) - cumulative

Area	2024	2029	2034	2039
Zone 1 – Richmond	-136	-403	-98	240
Zone 2 – Twickenham	-82	-494	-907	-872
Zone 3 – Whitton	-11	-44	-77	-71
Zone 4 – Teddington	-51	-245	-465	-106
Zone 5 – Hampton	-16	-77	-131	-120
Zone 6 – Kew/North Richmond	-36	-39	191	282
Zone 7 – Barnes/East Sheen	-2	59	139	98
Total	-335	-1,243	-1,348	-548

Source: Table 11, Appendix 3

- 4.43 The projections imply a combined over-supply of comparison goods floorspace of 1,243 sq.m gross in 2029, but this over-supply will reduce to 548 sq.m gross by 2039.
- 4.44 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 projected growth in turnover densities, resulting in less available expenditure for new floorspace.

Qualitative need

- 4.45 Collectively the town, local/neighbourhood centres and parades within LBRuT have 619 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 larger designated Metropolitan Centre. The four GLA designated District Centres in the Borough also have a reasonable provision of comparison goods outlets. The other lower tier centres have a more limited comparison goods offer.
- 4.46 As indicated in Section 3, all town centres have a reasonably high proportion of comparison good retail uses. Comparison goods representation is particularly strong in Richmond and East Sheen town centres as shown in Figure 3.3. The analysis of town centres in Appendix 5 indicates the range and choice of comparison goods shops is a key strength of Richmond town centre. Most categories of comparison goods shops are available in East Sheen and Twickenham and the choice within each category is reasonable. Most categories of comparison goods shops are also available in Teddington and Whitton, but the choice in some category is more limited. The analysis of local centres in Appendix 6 indicates many local centres have a chemist.
- 4.47 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

- 4.48 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 £521.69 million in 2022 to over £618 million in 2039.
- 4.49 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. In 2024 there is a relatively small expenditure surplus of £8.59 million. However, continued population and expenditure growth creates an expenditure surplus of £22.73 million at 2029 increasing to £34.36 million by 2034 and £50.43 million by 2039. Floorspace capacity projections are shown in Table 11 in Appendix 4 and summarised in Table 4.7 below.
- 4.50 The projections suggest a combined under-supply of food/beverage floorspace in 2024, which will increase to 7,722 sq.m gross in 2039.
- 4.51 The Richmond Retail Study 2014 predicted capacity for 9,118 sq.m gross of food/beverage floorspace the 15 year period up to 2029, which is higher than the updated 17 year projection up to **2039. The main reason for this significant difference is Experian's lower expenditure projections.**

Table 4.7 Food/beverage floorspace capacity (sq.m gross) - cumulative

	2024	2029	2034	2039
Zone 1 – Richmond	404	1,099	1,956	2,853
Zone 2 – Twickenham	340	709	798	1,067
Zone 3 – Whitton	31	75	89	134
Zone 4 – Teddington	303	705	839	1,681
Zone 5 – Hampton	33	80	123	166
Zone 6 – Kew/North Richmond	61	218	460	572
Zone 7 – Barnes/East Sheen	247	772	1,128	1,249
Total	1,418	3,658	5,394	7,722

Source: Table 11, Appendix 3

Qualitative need

- 4.52 Collectively the town, local/neighbourhood centres and parades within LBRuT have 342 restaurants/café; 60 pubs/bars and 84 hot food takeaways. The town centres within LBRuT provide a good range and choice of food/beverage outlets. As indicated in Section 3, all town centres have a reasonably strong food/beverage offer. Richmond, East Sheen and Twickenham have the strongest provision of outlets serving the evening economy. Local and neighbourhood centres and parades also provide a wide choice of food/beverage outlets, as shown in Figure 3.4.
- 4.53 The analysis of town centres in Appendix 5 indicates the range and choice of food/beverage outlets is a strength of Richmond, East Sheen, Teddington and Twickenham town centres. The analysis of local centres in Appendix 6 indicates all local centres have at least one hot food takeaway or café and many local centres have a pub/bar.
- 4.54 Overall, the accessibility for residents in LBRuT to a range and choice of food/beverage outlets is good.

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, as part of an employment land review.

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 generates £118.1 million in 2022 (an average of about £596 person) on selected cultural, recreational and sporting services, broken down as follows:

- cinema admissions £11.4 million;
- live entertainment i.e. theatre/concerts/shows £25.8 million;
- museums, theme parks, houses and gardens £13.5 million;
- admissions to clubs, dances, discos, bingo £4.4 million;
- other miscellaneous entertainment £11.1 million;
- subscriptions to sports and social clubs £27.5 million; and
- leisure class fees £24.4 million.

5.4 Not all leisure/cultural spend from residents will be spent in LBRuT. The household survey results have been used to estimate the household participation rates and the retention for leisure trips within the study area, as shown in Table 5.1. Less than 10% of households do not participate in any of the nine leisure activities explored by the household survey.

Table 5.1 Leisure participation and trip retention (% of households in the study area)

Leisure activity	% Households participating	% Trips attracted to LBRUT
Cinema	48.6	55.1
Theatre	47.9	27.1
Nightclubs/live music venues	14.1	14.1
Bingo	2.1	21.6
Bookmakers	1.1	66.8
Gyms/health and fitness club	31.5	69.8
Tenpin bowling/ gaming	8.8	0.0
Trampoline park	6.3	0.0
Museums and art galleries	52.1	6.5

Source: NEMS household survey results May 2022

- 5.5 The participation and retention rates vary significantly for each activity. Many residents travel outside the study area e.g. to Kingston upon Thames and Central London for some leisure activities, particularly trips to theatres, museums and art galleries. The retention rate is highest for trips to cinemas and health/fitness clubs.
- 5.6 Taking these leisure trip retention rates into account and the split of cultural/entertainment expenditure shown above, it is reasonable to assume LBRuT currently retains about 45% of **resident's total leisure expenditure** within the study area, due to **the Borough's proximity** to other leisure destination in London. Based on this estimated 45% market share, attracted leisure expenditure in 2022 is about £53.1 million.
- 5.7 Residents in LBRuT have a reasonable range of commercial leisure and entertainment uses and there is excellent provision within neighbouring authorities and Central London.

Leisure/cultural floorspace capacity

- 5.8 **Experian's expenditure projections suggest leisure expenditure per person should** increase in real terms by +12.6% between 2022 to 2034 and by +17.7% between 2022 to 2039, which will generate an additional +£14.9 million for these activities from the resident population by 2034 or £20.9 million by 2039.
- 5.9 With population growth (+0.1% by 2034 or +0.7% by 2039) on these leisure/cultural activities expenditure should increase from £118.1 million in 2022 to £133.1 million by 2034 and then £140 million in 2039, an additional £15 million by 2034 or £21.9 million by 2039. As a minimum, it is reasonable to assume LBRuT can continue to retain 45% of this expenditure growth i.e. £9.9 million in 2039. However, there should be potential for the Borough to increase its market share of expenditure growth. The development strategy could seek to retain 70% of the future expenditure growth, which is more consistent with the market share for food/beverage expenditure. On this basis, retained expenditure growth could be £10.5 million in 2034 increasing to £15.3 million in 2039.
- 5.10 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 £10.5 million and then £15.3 million, as indicated above, then this additional expenditure could support about 5,000 sq.m gross of new commercial leisure and cultural floorspace by 2034, based on an assigned average of £2,000 per sq.m, increasing to 7,500 sq.m gross by 2039.
- 5.11 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

- 5.12 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 (pre-Covid) visitation rate was about 2.6 trips per person per annum, with average box office receipts of over £7 per trip.

- 5.13 During 2020 the number of UK cinema admissions reduced to 44 million due to the Covid-19 lockdowns but recovered to 74 million trips in 2021. The number of trips during the ongoing Covid-19 crisis will have reduced significantly. The need assessment assumes cinema admissions will recover to pre-Covid levels by 2024, i.e. 2.6 trips per person.
- 5.14 The BFI identifies 843 cinema facilities with 4,596 screens and 937,161 seats in the UK. **Lichfields’ national** 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 38,000 cinema trips per annum for each cinema screen or 190 trips per annum for each seat available.
- 5.15 **Experian’s local expenditure data indicates** LBRuT generates £11.4 million on cinema trips. This expenditure estimate appears to be higher than 513,000 cinema trips estimated above because it implies an average of over £22 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).
- 5.16 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/Red Lion St. Richmond (7 screens/1,006 seats); and
 - 3 Olympic Studios, Barnes (2 screens/201 seats).
- 5.17 The population within LBRuT is 197,406 in 2022 which would generate around 513,000 cinema trips per annum, based on the national average visitation rate (2.6 trips per annum). The household survey results suggests LBRuT retains 55.1% of cinema trips, which would be 283,000 trips based on the national average visitation rate.
- 5.18 Adopting the national average population per cinema screen (38,000 trips per screen), implies that 283,000 cinema trips generates demand for 7 cinema screens. In terms of seats, the national average (190 trips per seat) suggests 283,000 trips could support 1,489 seats. These projections suggest a current over-supply of 3 screens, but an under-supply of 138 seats. Population within LBRuT is projected to increase marginally to 198,770 by 2039, generating 517,000 cinema trips in total. LBRuT should attract 285,000 trips. These projections suggest a future under-supply of only 149 seats in 2039.
- 5.19 A hybrid planning application submitted in March 2022 for mixed use redevelopment of the Stag Brewery at Lower Richmond Road, Mortlake includes a new boutique cinema (1,606 sq.m GIA and up to 3 screens).
- 5.20 The cinema projections suggest limited capacity for a further cinema within LBRuT and the presence of three large multiplex cinemas (Odeon in Kingston, Cineworld in Feltham and Wandsworth) may limit operator demand for an additional facility over and above the Stag Brewery proposals. 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

- 5.21 The household survey results indicate a relatively high proportion (nearly 48%) of respondents in the study area visit theatres. Over 52% visit museums/art galleries. Only 14% visit nightclubs/live music venues.
- 5.22 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.

- 5.23 **Experian’s local expenditure data indicates LBRuT generates £25.8 million** on live theatre, concerts and shows. Based on the average ticket revenue per venue (£5.7 million) LBRuT population generates theoretical demand for four venues, but the household survey results suggest LBRuT retains only 27% of **resident’s trips to these venues, due to access to facilities in the West End.**
- 5.24 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.
- 5.25 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.
- 5.26 **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 £4.4 million within LBRuT. Access to nightclubs in the West End is also likely to limit demand for additional facilities in the Borough.
- 5.27 **Experian’s local expenditure data indicates** LBRuT generates £13.5 million on museums, theme parks, houses and garden. Leisure expenditure, including population growth, is projected to increase by 18.5% by 2039. This growth could generate an additional £2.5 million by 2039.
- 5.28 **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, which is difficult to quantify.
- 5.29 **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 for this entertainment and cultural sector needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Health and fitness clubs

- 5.30 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.
- 5.31 The household survey results indicate over 31% of households visit health and fitness gyms. The survey results also suggest LBRuT retains nearly 70% of gym trips in the study area equating to a catchment population of about 138,000 in 2022.

- 5.32 The Sport England/Active Places data indicates that there are 30 registered health and fitness facilities in LBRuT, with 1,438 fitness stations as shown in Table 5.2. **LBRuT's 2022** catchment population (138,000) suggests an average of 10.4 fitness stations per 1,000 people. Greater London has 1,132 Sport England registered health and fitness facilities with 78,575 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. The figures suggest LBRuT has a good provision of health and fitness facilities.

Table 5.2 LBRuT health and fitness facilities (Active Places, April 2022)

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
Energie Fitness, Hampton Hill	Registered Membership use	75
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		1,513

- 5.33 Demand for additional facilities within LBRuT should arise from future population growth and/or increased participation rates. **As indicated above, LBRuT's population generates** £27.5 million on subscriptions to sports and social clubs. About 70% of this expenditure (£19.2 million) is retained in the Borough, which equates to about £13,000 per fitness station.
- 5.34 Based on population and **Experian's** leisure expenditure projections, retained expenditure on this activity in LBRuT should increase from £19.2 million in 2022 to £22.8 million in 2039, an additional £3.6 million. Based on £13,000 per fitness station, this additional expenditure could support 277 new fitness stations by 2039, or four medium sized facilities.

Tenpin bowling and other indoor leisure innovations

- 5.35 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.
- 5.36 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 Star Lanes in Westfields White City.
- 5.37 **LBRuT's current population (197,406)** could theoretically support at least 16 lanes, based on the national average of one lane per 12,000 people. This theoretical capacity would increase marginally to 17 lanes by 2039, due to population growth.
- 5.38 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 to accommodate this use.
- 5.39 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.
- 5.40 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.
- 5.41 The household survey results indicate only 6.3% of respondents in the study area visit trampoline centres. Trampoline destinations mentioned by households participating in this activity were:
- Jump Giants, Slough (27%)
 - Jump in Adventure Park, Esher (15%)
 - Flip Out, Wandsworth (10%)
 - Airhop Trampoline Park, Guildford (9%)
- 5.42 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

- 5.43 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.

- 5.44 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.
- 5.45 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.
- 5.46 The household survey results suggest the bingo participation rate is only 2.1% of households, which is much lower than the UK average participation rates of around 5%. Furthermore, LBRuT's **market share of bingo trips in the study area is relatively low** at less than 22%. The adult population (about 155,000 in 2022) in the study area is theoretically capable of supporting two bingo facilities and 0.5 casinos, based on the UK averages. However, the low participation and retention rates indicate there is limited potential in LBRuT.

Conclusions on commercial leisure uses

- 5.47 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.
- 5.48 In global terms future expenditure growth could support new commercial leisure and cultural floorspace in LBRuT of:
- about 5,000 sq.m by 2034; or
 - about 7,500 sq.m by 2039.
- 5.49 Excluding the proposed boutique cinema at the Stag Brewery in Mortlake, this additional floorspace could include:
- 4 additional medium sized health and fitness facilities (277 new fitness stations);
 - small scale tourist attractions/cultural facilities such as museums/galleries; and
 - a trampoline centre and other new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities.
- 5.50 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy vacated retail space should be considered. A flexible strategy could support the Cultural Quarters in Richmond and Twickenham town centres and clusters of cultural facilities and creative industries in other centres.

6.0 **Implications for future policy**

Accommodating growth and change

National and London Guidance

- 6.1 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 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. However, as indicated in Section 2, the recent changes to the UCO and PDR significantly restrict the Council's ability to control the mix of uses within centres through a plan-led approach.
- 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 The London Plan 2021 Policy E9: Retail, Markets and Hot Food Takeaways indicates borough development plans should identify future requirements and locations for new retail development. Plans should also identify areas for consolidation of retail space where there is a surplus. The capacity projections in this study update suggest surplus retail **floorspace may emerge in LBRuT's centres.**
- 6.6 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.
- 6.7 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. 87). 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. 88).

- 6.8 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).
- 6.9 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.
- 6.10 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020 and changes to permitted development rights were introduced in 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.
- 6.11 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) have been excluded. The assessment 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.

Floorspace capacity projections

- 6.12 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, 6.2 and 6.3 below summarise the floorspace requirements in LBRuT up to 2029, 2034 and 2039 (cumulative).
- 6.13 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.
- 6.14 Table 6.1 indicates there is a small combined projected requirement of 731 sq.m gross of retail and food/beverage floorspace in 2029. By 2034 the combined requirement increases to 2,495 sq.m gross and then to 6,163 sq.m gross. 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 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.

Table 6.1 Summary of retail and food/beverage floorspace requirements up to 2029 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/beverage (sq.m gross)	Total (sq.m gross)
1 – Richmond	-488	-403	1,099	208
2 – Twickenham	-548	-494	709	-333
3 – Whitton	-65	-44	75	-34
4 – Teddington	-175	-245	705	285
5 – Hampton	-313	-77	80	-310
6 – Kew/North Richmond	-34	-39	218	145
7 – Barnes/East Sheen	-62	59	772	769
Total	-1,684	-1,243	3,658	731

Table 6.2 Summary of retail and food/beverage floorspace requirements up to 2034 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/beverage (sq.m gross)	Total (sq.m gross)
1 – Richmond	-120	-98	1,956	1,738
2 – Twickenham	-784	-907	798	-893
3 – Whitton	-90	-77	89	-78
4 – Teddington	-263	-465	839	111
5 – Hampton	-438	-131	123	-446
6 – Kew/North Richmond	95	191	460	746
7 – Barnes/East Sheen	50	139	1,128	1,317
Total	-1,550	-1,348	5,394	2,495

Table 6.3 Summary of retail and food/beverage floorspace requirements up to 2039 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/beverage (sq.m gross)	Total (sq.m gross)
1 – Richmond	177	240	2,853	3,270
2 – Twickenham	-824	-872	1,067	-629
3 – Whitton	-87	-71	134	-24
4 – Teddington	-60	-106	1,681	1,515
5 – Hampton	-355	-120	166	-309
6 – Kew/North Richmond	133	282	572	987
7 – Barnes/East Sheen	4	98	1,249	1,351
Total	-1,011	-548	7,722	6,163

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

6.16 The Local Plan should seek to identify and accommodate growth for at least 10 years. Given the uncertainties relating to very long-term projections, the emerging Local Plan could address floorspace projections up to 2034 rather than 2039.

6.17 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. The projections do not take account extant planning permission or pipeline proposals. For example, emerging development proposals at the Stag Brewery near Mortlake are now expected to include 4,839 sq.m gross of flexible retail and leisure floorspace. If implemented this development proposal would primarily serve Zones 6 and 7, and the northern part of Zone 1. This development proposal could meet the combined long-term floorspace projections in Zone 6 and 7.

- 6.18 Draft Policy 17 of the Richmond Local Plan - Regulation 18 Draft for consultation supports shopping, leisure and cultural uses. The supporting text at paragraph 18.8 refers to modest need for additional retail floorspace. The quoted 1,121 sq.m gross combined over-supply of retail, food/beverage and other non-retail services up to 2034 should be updated to refer to an under-supply of 2,495 sq.m gross. The under-supply of 5,031 sq.m gross by 2039 should be updated to 6,163 sq.m gross. The floorspace projections for leisure/cultural floorspace should be amended to about 5,000 sq.m gross by 2034 and 7,500 sq.m gross by 2039.
- 6.19 Growth in the food/beverage and commercial leisure, entertainment and culture sectors provides an opportunity to enhance the evening and night-time economy in the town centres in LBRuT, including the repurposing of retail floorspace. The emerging Local Plan could recognise and foster this potential, albeit recognising potential negative environmental and amenity effects and considering appropriate management strategies and mitigation measures.

Vacant shop premises

- 6.20 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 retail/service premises could help to accommodate future growth.
- 6.21 **LBRuT's Town Centre Land Use Survey March 2021 indicates** there were 220 vacant units within LBRuT's centres and parade, an average vacancy rate of 8.9%, which is lower than the UK pre-Covid-19 average (12.4%). These figures relate to retail and service units previously in Use Classes A1/A2/A3/A4 and A5. Based on an average of 100 sq.m gross per unit, the total amount of vacant floorspace in centres and parades could be at least 22,000 sq.m gross. It is reasonable to assume the number of vacant units could reduce to around 7%, consistent with lower historic vacancy rates recorded in 2016/2017. This reduction in the shop vacancy rate could theoretically accommodate about 5,000 sq.m of new uses, which could meet most of the projected combined retail and food/beverage floorspace under-supply up to 2039 (6,163 sq.m gross).
- 6.22 The medium to long term projections and vacancy rates suggest there is no quantitative need to increase the combined amount of retail and food/beverage floorspace in LBRuT up to 2034. However, there is likely to be a shift from retail space to food/ beverage and leisure/cultural uses, with some vacant shop premises also converting to these uses. Not all vacant units will be suitable for conversion to leisure/cultural uses, therefore some development will be required to accommodate new uses.
- 6.23 Based on recent experience, demand for town centre premises will require a mix of unit sizes. In general, national multiple retail, food/beverage and leisure operators require larger premises of a least 200 sq.m gross. Smaller independent SMEs tend to require smaller premises of under 100 sq.m gross. It is difficult to predict the precise mix of unit sizes that will be required in the long-term, therefore a flexible approach is required that can respond to changes in market demand. New developments should seek to provide a mix

of unit sizes and flexible designs allowing units to be amalgamated or sub-divided as required by operators.

- 6.24 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.**
- 6.25 The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail development to accommodate projected growth over the next 10 to 15 years. This approach is consistent with supporting text at paragraph 18.10 of the emerging Local Plan, which identifies no need to allocate sites for major retail development. 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 combined need for retail and food/beverage uses up to 2034 and possibly 2039.
- 6.26 The floorspace projections also suggest there is a need to retain the existing stock of shop premises within designated centres to accommodate future growth in the food/beverage, leisure and cultural sectors. A significant contraction of town or local centres is **unnecessary. The projections support the Council’s approach** to continue the Article 4 Direction that removes the permitted development rights for a change of use from Class E to residential.
- 6.27 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.
- 6.28 The long-term development strategy for the seven zones within the LBRuT is set out below.

Richmond (Zone 1)

- 6.29 Richmond is a designated Major Centre in the London Plan in Zone 1, which also serves all other zones in the Borough. Zone 1 also has three local/neighbourhood centres and two local parades. This zone has a good provision of existing retail, food/beverage and leisure facilities. The combined retail and food/beverage floorspace projections for Richmond – Zone 1 in 2034 is about 1,750 sq.m gross, increasing to 3,300 sq.m gross by 2039. Over 87% of the 2039 floorspace requirement relates to food/beverage, which could enhance the night-time economy in Richmond town centre.

Table 6.4 Combined retail and food/beverage floorspace requirements for Richmond (Zone 1) (sq.m gross)

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
By 2034	-100	-100	1,950	1,750
By 2039	200	250	2,850	3,300

- 6.30 There are 52 vacant shop units in Zone 1 and the shop vacancy rate is about 11%. If the vacancy rate reduced to 7% then reoccupied floorspace in this zone could be about 2,000 sq.m gross, which is above the combined floorspace projection to 2034, and about 60% of the long-term projection to 2039.

6.31 Allowing for this reoccupation of vacant floorspace, there could be a residual requirement for about 1,300 sq.m gross in 2039, which may in part be met by future development at the Stag Brewery at Mortlake.

Twickenham (Zone 2)

6.32 Twickenham is a designated District Centre in the London Plan. Zone 2 also has two local centres and five local parades. This zone has a good provision of retail and food/beverage uses. The combined retail and food/beverage floorspace projections for Twickenham – Zone 2 in 2034 suggest an over-supply of about -900 sq.m gross, which reduces to -600 sq.m gross in 2039. However, there is projected scope for additional food/beverage uses, which should partially counterbalance the projected potential loss of retail uses.

6.33 There are 40 vacant shop units in Zone 2 and the shop vacancy rate is 8.7%. If the vacancy rate reduced to 7% then reoccupied floorspace in this zone could be about 800 sq.m gross. The projections suggest there is no residual requirement for new floorspace in Zone 2.

Table 6.5 Combined retail and food/beverage floorspace requirements for Twickenham (Zone 2) (sq.m gross)

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
By 2034	-800	-900	800	-900
By 2039	-800	-850	1,050	-600

Whitton (Zone 3)

6.34 Whitton is the smallest designated town centre in LBRuT, which primarily serves Zone 3. Zone 3 also has two neighbourhood centres and four local parades. The combined retail and food/beverage floorspace projections for Zone 3 suggest an over-supply in 2034 and 2039. There are 22 vacant shop units in Zone 3 and the shop vacancy rate is 8.4%. If the vacancy rate reduced to 7% then reoccupied floorspace in this zone could be about 400 sq.m gross. The projections suggest there is no residual requirement for new floorspace in Zone 3.

Table 6.6 Combined retail and food/beverage floorspace requirements for Whitton (Zone 3) (sq.m gross)

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
By 2034	-100	-100	100	-100
By 2039	-100	-50	100	-50

Teddington (Zone 4)

6.35 Teddington is a designated District Centre in Zone 4. Zone 4 also has three local/ neighbourhood centres and one local parade. Zone 4 has a good provision of retail and food/beverage uses. The combined retail and food/beverage floorspace projections for Teddington – Zone 4 in 2034 suggest a small under-supply of about 100 sq.m gross, which increase to 1,500 sq.m gross in 2039. These projections relate to additional food/beverage uses, which should counter-balance the projected potential loss of retail uses.

6.36 There are 36 vacant shop units in Zone 4 and the shop vacancy rate is about 10%. If the vacancy rate reduced to 7% then reoccupied floorspace in this zone could be about 1,100

sq.m gross, which would accommodate over 70% of the floorspace capacity projection in 2039. There could be a small residual requirement of about 400 sq.m gross in 2039.

Table 6.7 Combined retail and food/beverage floorspace requirements for Teddington (Zone 4) (sq.m gross)

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
By 2034	-250	-450	800	100
By 2039	-50	-100	1,650	1,500

Hampton (Zone 5)

- 6.37 Zone 5 is in the southwest of LBRuT. This area has no designated town centres but is reasonably accessible to Teddington and Kingston. This zone includes Hampton Village local centre and one local parade. The combined retail and food/beverage floorspace projections for Zone 5 suggest an over-supply in 2034 and 2039. There are 8 vacant shop units in Zone 5 and the shop vacancy rate is 9.9%. If the vacancy rate reduced to 7% then reoccupied floorspace in this zone could be about 200 sq.m gross. The projections suggest there is no residual requirement for new floorspace in Zone 5.

Table 6.8 Combined retail and food/beverage floorspace requirements for Hampton (Zone 5) (sq.m gross)

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
By 2034	-400	-100	100	-400
By 2039	-350	-100	150	-300

Kew/North Richmond (Zone 6)

- 6.38 Kew Gardens local centre is the largest centre in Zone 6, but Richmond town centre is accessible from this zone. Zone 6 also has four local parades. The combined retail and food/beverage floorspace projections for Zone 6 in 2034 suggest a small under-supply of about 150 sq.m gross, which increases to 1,000 sq.m gross in 2039.

Table 6.9 Combined retail and food/beverage floorspace requirements for Kew/North Richmond (Zone 6) (sq.m gross)

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
By 2034	100	200	450	750
By 2039	150	300	550	1,000

- 6.39 There are 11 vacant shop units in Zone 6 and the shop vacancy rate is 7.7% and there is limited scope to accommodate growth. However, as indicate above, the floorspace projections do not take account of emerging development proposals at the Stag Brewery, which is expected to include 4,839 sq.m gross of flexible retail and leisure floorspace. This development could meet the long-term floorspace projections in Zone 6 and 7. Alternatively, residual capacity in this zone could be transferred to Richmond – Zone 1.

Barnes/East Sheen (Zone 7)

- 6.40 East Sheen town centre and Barnes local centre provide a good range of retail and food/beverage uses in Zone 7. The combined retail and food/beverage floorspace projections for Zone 7 in 2034 suggest a small under-supply of about 1,300 sq.m gross, which increase to 1,350 sq.m gross in 2039.
- 6.41 There are 50 vacant shop units in Zone 7 and the shop vacancy rate is 10.8%. If the vacancy rate reduced to 7% then reoccupied floorspace in this zone could be about 1,700 sq.m gross. Reoccupied vacant floorspace could accommodate the floorspace projection up to 2039. Alternatively, residual capacity in this zone could be met by the Stag Brewery development or alternatively transferred to Richmond – Zone 1.

Table 6.10 Combined retail and food/beverage floorspace requirements for Barnes/East Sheen (Zone 7) (sq.m gross)

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
By 2034	50	150	1,100	1,300
By 2039	0	100	1,250	1,350

Hierarchy of centres

- 6.42 The network of town centres is currently set out in the Richmond Local Plan - Regulation 18 Draft for consultation under Policy 17 at paragraphs 18.1 to 18.7. Continuing to identify the hierarchy of centres in the Local Plan 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.
- 6.43 The network of town, local and neighbourhood centres 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 is the largest and dominant town centre in the Borough, consistent with its designation as a Major Centre in the London Plan. The retail and food beverage floorspace capacity projections up to 2039 suggest over half of the projected floorspace capacity could be provided in Richmond (Zone 1).
- 6.44 The five designated town centres including Richmond all continue to play an important role as a focal point in their respective areas. It is appropriate to continue to differentiate these town centres from the smaller local centres in the Borough. The retail and food beverage floorspace capacity projections up to 2039 suggest there is potential for modest growth in most parts of the Borough.
- 6.45 The analysis of designated local centres in Section 3, Appendix 5 and Appendix 6, indicate there is a degree of overlap in the size and role of centres. **The Council’s established hierarchy reflects several factors, including the centre’s size and contribution to meeting local needs including those areas most relatively disadvantaged; 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.** It has been a long-standing aim of local planning policy to provide local shopping provision for residents.

Furthermore, the increased importance of local shops and services post the pandemic has **given rise to the Council’s support for the 20 minute neighbourhood concept of “living locally”**. The Council intends to review the categorisation of designated centres.

6.46 The NPPF Annex 2 Glossary indicates:

“References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance.”

6.47 Most local, neighbourhood centres and local parades are meeting local needs. Some local parades have limited facilities and may be under threat if shop/service closures occur in the future e.g. Nelson Road **and St Margaret’s Road. These parades should continue to be protected** because they help to ensure all residents have access to local facilities within walking distance. The implementation of draft Policy 20 (Local shops and services) will be important in meeting this objective.

Impact and sequential tests

6.48 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.

6.49 The London Plan 2021 Policy SD7 is consistent with the NPPF in relation to the sequential and impact tests, although the impact test in the London Plan refers to office uses as well as retail and leisure uses. The emerging Local Plan in LBRuT could adopt either the London Plan or NPPF approach. However, there is no need to assess the impact of office development in LBRuT provided the sequential test is satisfied. This approach is consistent with draft Policy 18 (Development in centres) in the emerging Regulation 18 Local Plan.

Impact threshold

6.50 The NPPF indicates, if there is no locally set threshold, then 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.

6.51 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.**

- 6.52 The NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate threshold for LBRuT because this scale of development would exceed the overall long-term retail/food beverage/leisure projections in most zones in the Borough. The lower retail capacity projections, relatively high vacancy rates in some centres and uncertainties about the post-Covid recovery suggest town centres are now more vulnerable to out-of-centre developments.
- 6.53 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.
- 6.54 Draft Policy 18 (Development in centres) proposes a reduced impact threshold of 500 sq.m gross, which is broadly consistent with the Sunday trading threshold (280 sq.m net or about 400 - 500 sq.m gross). As proposed in draft Policy 18, this threshold should apply to retail and leisure uses combined, also combined floorspace across different phases of development. Based on the relatively low, and in some cases negative, floorspace capacity projections set out in Tables 6.1, 6.2 and 6.3, a lower impact threshold in line with the Sunday trading limit is appropriate to protect the vitality and viability of designated centres in LBRuT.
- 6.55 All retail and leisure developments over 500 sq.m gross (combined) proposed outside or on the edge of designated town, local and neighbourhood centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations. The level of detail required in the impact assessment will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.

Implications of UCO changes for the impact and sequential tests

- 6.56 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, draft Policy 18 relating to the impact test, correctly refers to retail and leisure uses rather than Class E within the new UCO.
- 6.57 As indicated above, the London Plan indicates the impact proposals for out of centre office uses should also be considered. The inclusion of office uses within the sequential test would offer appropriate control in LBRuT, consistent with the NPPF.

Scale of development within centres

- 6.58 The NPPF does not require retail or leisure development within designated centres to be of an appropriate scale to that centre or require an impact assessment to be provided. Draft Policy 18 seeks to prevent in-centre development that would be out of keeping with the role and function of the centre. Whilst not advocated by the NPPF, the London Plan indicates development proposals should ensure commercial floorspace relates to the size, role and function of the town centre and its catchment. Draft Policy 18 is consistent with the London Plan approach.
- 6.59 Given the relatively low floorspace capacity projections identified in this study, overlapping catchment areas and the relatively high vacancy rates in some centres, a policy to control

the scale of development within centres, i.e. preventing development that could harm the hierarchy of centres, appears sound and consistent with the London Plan. This approach is also helpful in applying the sequential approach to site selection.

Sequential test floorspace threshold

- 6.60 The NPPF and the London Plan do not refer to a minimum floorspace threshold where the sequential test will be applied in the same way as the impact test. All main town centre uses regardless of scale are required to comply with the sequential test. Draft Policy 18 indicates the sequential test only applies to developments and extensions over 200 sq.m gross. Draft Policy 20 (Local shops and services) seeks to prevent the loss of local shops and services and indicates the provision of new facilities may be appropriate in new residential led developments or where the scale of provision is justified to meet a local need.
- 6.61 The benefit of this proposed approach is that it allows local facilities to be provided in areas that may be poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.
- 6.62 The PPG suggests some certain main town centre uses have “particular market and locational requirements that mean they may only be accommodated in specific locations”, but robust justification must be provided to satisfy the sequential test in this respect. The aims of draft Policy 18 appear to be consistent with this guidance.

Town centre boundaries

- 6.63 The London Plan indicates development plans should define detailed boundaries for town centres. Designated town and local centre boundaries where possible should be tightly drawn to assist in controlling the appropriate scale and nature of development. Designated centres should 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.
- 6.64 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 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.
- 6.65 The first preference for leisure and other non-retail main town centre uses is normally the wider defined town centre area, which usually includes the PSA and other parts of the town centre. The ability to focus new retail uses within the PSA, rather than the wider town centre area, has become more difficult with the introduction of the new Class E, which allows free movement to and from retail use and other town centre uses.
- 6.66 Draft Policy 18 clearly indicates the PSA will be the Key and Secondary frontages on the Policies, and this is where retail uses will be protected and promoted. Other community and learning uses will be promoted outside of this area. Major developments that generate high levels of trips should be located within the town centre boundary. For centres, or parts of centres where no boundary exists, proposals should be well-related to designated frontages. Area of Mixed Use boundaries delineates the smaller centres and parades in the hierarchy.

- 6.67 Draft Policy 18 indicates new retail development should be focussed in the Key and Secondary frontages (KSF and SSF), rather than the wider town centre boundary. This is consistent with the NPPF that suggests 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 centre boundary may cover the same area and it will be unnecessary to designate two boundaries. The designation of frontages or an area of mixed use in smaller centres is consistent with this guidance.
- 6.68 The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis. Some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant.
- 6.69 The relatively low floorspace capacity projections, the number of vacant units and assessment of potential development opportunity sites in centres suggest there is no need to extend the centre boundaries to accommodate future growth. However, the floorspace projections suggest a long-term under-supply of floorspace, that implies the contraction of centre boundaries is also unnecessary. The expansion or contraction of centre boundaries should be considered on a centre by centre basis.
- 6.70 The extension of centre boundaries should only be necessary where there are existing retail/town centre uses, just outside the centre boundary, which are worthy of future protection. The contraction of centre boundaries could be considered where there is a concentration of non-town centre uses on the periphery of centres e.g. residential gaps in frontages or a concentration of vacant shop units.

Controlling the mix of uses

- 6.71 Adopted Policy LP26 currently designates Key and Secondary Shopping Frontages/areas within designated centres. The KSFs were expected to contain the main concentration of retail use. Existing policies generally seeks to concentrate and protect retail uses within the KSFs, whilst allowing a more flexible approach in SSFs.
- 6.72 The Council has worked 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.
- 6.73 Draft Local Plan Policies 18, 19 and 20 in combination seek to protect and control the mix of uses. The Key frontages are in the most central areas, where retail already predominates. Secondary frontages are more peripheral, but still play a supporting role to the retail centre. The secondary frontages provide opportunities for diversification.
- 6.74 The policy approach recognises the limitation in controlling uses within Use Class E, but some uses not included within Class E can be controlled i.e. betting shops, pubs, bars, hot food takeaways, cinemas and theatres.

- 6.75 The KSFs are expected to contain the main concentration of retail use. Draft Policy 18 seeks to retain active frontages and shop fronts and avoid over-concentrations of similar uses.
- 6.76 The 2021 land use information for the town centres indicate the current proportion of retail units in each centre is as follows (excluding vacant units):
- Richmond 47.2%
 - East Sheen 49.7%
 - Teddington 44.5%
 - Twickenham 40.2%
 - Whitton 44.3%
- 6.77 The Goad UK average for retail uses (excluding vacant premises) is 45.4%, which suggests most of the town centres have maintained a relatively strong proportion of retail uses. Twickenham has the lowest proportion, but this may reflect its proximity to the National rugby stadium.
- 6.78 Considering current and likely future market trends, the low floorspace capacity projections, and changes to the UCO and permitted development rights described earlier, a more restrictive policy approach could be considered to be unsound. The UCO/PDR changes prevent a more restrictive approach, recognising that the introduction of Article 4 directions can only remove permitted GPDO changes of uses but not movement within the same use class i.e. new Class E. Furthermore, this approach could be inappropriate as it could lead to an increase in vacant units
- 6.79 The implementation of the proposed policy approach in the Local Plan Regulation 18 draft will be hampered by the UCO/PDR changes. However, the approach does seek to encourage all Class E uses within centre boundaries and potentially other community uses (now Classes F.1 and F.2). Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses are appropriately assessed against a criteria-based policy relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. All other non-Class E uses at ground floor level can be controlled within the designated frontages.
- 6.80 Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this not affected by changes to the Use Classes Order or Permitted Development Rights. Furthermore, The London Plan 2021 Policy E9: Retail, Markets and Hot Food Takeaways indicates hot food takeaways should not be permitted where they are within 400 metres walking distance from the entrances/exits to primary and secondary schools. The objective of this policy criterion relates to public health concerns rather than the appropriate mix of uses. However, this policy also suggests the over-concentration of hot food takeaways should be managed in town centres and other areas.
- Richmond town centre
- 6.81 Richmond town centre has a shop vacancy rate of 12.5%, which is relatively high when compared with other centres in the Borough. However, no contraction of the Richmond town centre boundary is considered necessary.
- East Sheen
- 6.82 East Sheen has a shop vacancy rate of 12%. Minor amendments to **East Sheen's town centre** boundary could be considered. The northern part of the centre contains several residential

units. The town centre boundary could be adjusted to begin at Mortlake Railway Station. There are also residential units on southern side of Upper Richmond Road West, which could be removed. There are several residential units along the northern side of Upper Richmond Road West, between the junctions of Leinster Avenue, which could also be removed from the centre boundary.

Teddington

- 6.83 Teddington town centre has a relatively low shop vacancy rate of 7.9%. However, minor amendments to **Teddington's** town centre boundary could be considered. The eastern edge of the centre (High Street leading to Ferry Road) contains residential units, green space, an arts centre and a church which could all be removed from the town centre boundary. The town centre boundary could be slightly extended to include Pizza Express on the west side of Waldegrave Road. A small cluster of units along Church Road could also be included within the boundary.

Twickenham

- 6.84 Twickenham town centre has a shop vacancy rate of 7.2%. The town centre boundary is drawn relatively tightly around the retail and commercial area. No amendments to Twickenham town centre boundary are recommended.

Whitton

- 6.85 Whitton town centre is a compact, linear centre. The centre has a relatively low vacancy rate of 8%. No amendments to Whitton town centre boundary are recommended.

Viability of small premises

- 6.86 As part of an exercise to assess the size of existing commercial/retail units and to help to consider what constitutes a viable-sized unit, Lichfields has analysed a sample of 50 small existing occupied commercial premises within town, local and neighbourhood centres across the borough. For each property the current rateable value was obtained. Published operator space requirements have also been obtained which helped to assess the size of premises currently being sought by various types of town centre operators. From the analysis of properties and operator requirements, a viable typology for small commercial premises suitable for future small town centre uses has been identified. This analysis revealed that the following key points.
- The majority (about 80%) of existing shop/service premises range from 50 to 300 sqm gross.
 - Over 60% of shop premises are medium sized units with a ground floor area of between 100 to 500 sq.m gross. **Published operator's minimum space requirements indicate** there is likely to be continued demand for units within this mid-size category in the future, with about 51% of minimum space requirements in this category.
 - Demand for smaller units of between 50 to 100 sq.m should also be relatively strong. About 23% of LBRuT premises are in this smaller size category, compared with about 30% of listed operator minimum space requirements.
 - Demand for very small units under 50 sq.m gross is likely to be weaker, with less than 15% of minimum space requirements in this size category. At present, less than 8% of

LBRuT's shop premises are under 50 sq.m gross, which suggests a reasonable balance between supply and demand of small units in the Borough. Just over 14% of minimum space requirements are for small units of under 50 sq.m gross and less than 4% of listed minimum space requirements were for small kiosk units of around 20 sq.m gross. Small units of less than 50 sq.m will be viable for some operators but this is likely to be a small minority of premises. The provision of too many small kiosk units of around 20 sq.m gross could be harmful to the centre's ability to attract new tenants.

- **The Council's land use data for 2021 indicates town centres in the Borough have a** broad mix of unit sizes, which the potential space requirements indicate LBRuT should seek to retain.

6.87 The analysis suggests small units of between 30 to 50 sq.m gross appear to be viable in terms of operational requirements and rental costs, but some may still require service access. Demand for small kiosk type units (around 20 sq.m gross) is likely to be much more limited.

6.88 The proportion of small shop premises under 50 sq.m in town centre should be monitored. A significant increase in the proportion of small units in a centre could be harmful to the vitality and viability of the centre, because these units would not meet the minimum space requirements of most town centre operators. In particular, the proportion of very small units under 30 sq.m gross should be carefully monitored and ideally should not account for more than 5% of all units within the centre.

7.0 Summary and conclusions

7.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for LBRuT. It explores how the identified growth and change across the Borough could be accommodated and the future role of the town centres.

Meeting the Borough's needs

7.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail and leisure development over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

7.3 The combined floorspace projections for retail, food/beverage and commercial leisure/entertainment/cultural floorspace in 2029, 2034 and 2039 are summarised and rounded in Table 7.1. In addition to these floorspace capacity projections there may be potential up to 2039 to accommodate an additional 7,500 sq.m gross of commercial leisure and cultural floorspace.

Table 7.1 Combined retail, food/beverage floorspace requirements (sq.m gross) --cumulative

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
By 2029	-1,700	-1,200	3,600	700
By 2034	-1,600	-1,300	5,400	2,500
By 2039	-1,000	-500	7,700	6,200

7.4 The Phase 1 Report July 2021 suggest a slightly lower combined floorspace projection of 5,031 sq.m gross by 2039. This small increase is due to Experian updated projections published in January 2022. The Richmond Retail Study 2014 predicted combined floorspace capacity was 34,332 sq.m gross up to 2029. The main reasons for the significant decrease in capacity are **Experian's lower expenditure projections (including higher deductions for on-line sales)** and higher increases in sales densities.

7.5 Long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long term projections must be treated with caution and kept under review, particularly projections beyond 2034.

7.6 The combined total projection to 2039 is 6,163 sq.m gross which is less than the current amount of vacant shop floorspace in the Borough (about 22,000 sq.m gross). Based on a reasonable reduction in shop vacancy rates, reoccupied space could in theory accommodate most of the projected need to 2039. However, there is likely to be a shift from retail space to food/ beverage and leisure/cultural uses, with vacant shop premises also converting to these uses. Not all vacant units will be suitable for conversion to leisure/cultural uses, therefore new development may be required to accommodate some new uses.

7.7 Future planning policy should seek to ensure new mixed use developments are flexible. The design and configuration of buildings should allow for the merger and sub-division of units,

offering maximum flexibility to respond to changing operator requirements over the plan period.

- 7.8 The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail development to accommodate projected growth over the plan period. The priority in the short to medium term will be the reoccupation of vacant shop units. However, 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.
- 7.9 Residents in LBRuT have reasonable access to a range of commercial leisure and entertainment facilities within the Borough and in the surrounding areas. Facilities in Central London are accessible, but not all the key sectors are represented. As indicated above, there may be potential up to 2039 to accommodate an additional 7,500 sq.m gross of commercial leisure and cultural floorspace, which could include:
- 4 additional medium sized health and fitness facilities (about 277 new fitness stations); and
 - additional tourist attractions/cultural facilities;
 - a trampoline centre, bingo hall and other new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities.
- 7.10 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

Strategy for accommodating growth

- 7.11 The floorspace projections shown in this study provide broad guidance. The priority should be to concentrate, if possible, new main town centre uses within vacant floorspace within centres. A cautious approach to new retail and food/beverage is required in the short to medium term. Any mixed-use development located out of centre should only include small scale retail and services to meet the needs of the development and the local area.
- 7.12 In Richmond (Zone 1) the town centre is serving a borough wide catchment area. The combined retail and food/beverage floorspace projections in 2039 is 3,300 sq.m gross. The reoccupation of vacant shop units could accommodate 60% of this long-term projection. There could be a residual requirement for about 1,300 sq.m gross in 2039, which may in part be met by future development at the Stag Brewery at Mortlake.
- 7.13 In Twickenham (Zone 2) there is a projected over-supply of combined retail and food/beverage floorspace projections of -600 sq.m gross in 2039. However, there is projected scope for additional food/beverage uses, which should partially counterbalance the projected potential loss of retail uses. The reoccupation of vacant units could be about 800 sq.m gross. The projections suggest there is no residual requirement for new floorspace in Zone 2.
- 7.14 In Whitton (Zone 3) there is also a projected over-supply up to 2039. Vacant units could accommodate about 400 sq.m gross. The projections suggest there is no residual requirement for new floorspace in Zone 3.
- 7.15 Teddington (Zone 4) has a projected under-supply of 1,500 sq.m gross in 2039, but vacant units could accommodate over 70% of this floorspace capacity, leaving a small residual requirement of about 400 sq.m gross in 2039.

- 7.16 Hampton Zone 5 has no designated town centres, but this area is reasonably accessible to Teddington and Kingston. The combined retail and food/beverage floorspace projections suggest an over-supply in 2039. The projections suggest there is no residual requirement for new floorspace in Zone 5.
- 7.17 Kew/North Richmond (Zone 6) and Barnes/East Sheen (Zone 7) has a projected under-supply of about 1,000 sq.m gross and 1,350 sq.m gross, respectively in 2039. Vacant shop units provide scope to accommodate most of this growth. The emerging development proposals at the Stag Brewery could meet any residual the long-term floorspace capacity.

Policy review

Hierarchy of centres

- 7.18 The hierarchy of centres should be identified in the Local Plan to ensure the vitality and viability of town and local centres is maintained and enhanced. 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.
- 7.19 Richmond town centre is the largest and dominant town centre in the Borough, consistent with its designation as a Major Centre in the London Plan. The other designated town centres all continue to play an important role as a focal point in their respective areas. It is appropriate to continue to differentiate these town centres from the smaller local centres and parades in the Borough. No amendments to the hierarchy are considered necessary.
- 7.20 Most local, neighbourhood centres and local parades are meeting local needs. Some local parades have limited facilities and may be under threat and should continue to be protected because they help to ensure all residents have access to local facilities within walking distance. The implementation of draft Policy 20 (Local shops and services) will be important in meeting this objective.

Impact and sequential tests

- 7.21 Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered.
- 7.22 The NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate threshold for LBRuT because this scale of development would exceed the overall long-term retail/food beverage/leisure projections in most zones in the Borough.
- 7.23 Draft Policy 18 (Development in centres) proposes a reduced impact threshold of 500 sq.m gross, consistent with the Sunday trading threshold. As proposed in draft Policy 18, this threshold should apply to retail and leisure uses combined, also combined floorspace across different phases of development.
- 7.24 The NPPF does not require retail or leisure development within designated centres to be of an appropriate scale to that centre or require an impact assessment to be provided. The London Plan indicates development proposals should ensure commercial floorspace relates to the size, role and function of the town centre and its catchment. Draft Policy 18 is consistent with the London Plan approach. A policy to control the scale of development within centres appears sound and consistent with the London Plan.

- 7.25 All main town centre uses regardless of scale are normally required to comply with the sequential test. Draft Policy 18 indicates the sequential test only applies to developments over 200 sq.m gross, which allows local facilities to be provided in areas that may be poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.

Town centre boundaries

- 7.26 The continued classification of centres and boundaries are important in identifying when to apply the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required.
- 7.27 Draft Policy 18 clearly indicates the PSA will be the Key and Secondary frontages on the Policies, and this is where retail uses will be protected and promoted. Other community and learning uses will be promoted outside of this area. Major development that generate high levels of trips should be located within the town centre boundary.
- 7.28 Draft Policy 18 indicates new retail development should be focussed in the Key and Secondary frontages (KSF and SSF), consistent with the NPPF that suggests the PSA normally comprises the core/primary shopping frontages and the contiguous secondary shopping frontages.
- 7.29 At this stage, it has been possible to review the Regulation 18 policy approach. It is understood that the Regulation 19 Plan may take a different and more flexible policy direction.
- 7.30 The relatively low floorspace capacity projections, the number of vacant units and assessment of potential development opportunity sites in centres suggest there is no need to extend the centre boundaries to accommodate future growth. However, the floorspace projections suggest a long-term under-supply of floorspace, that implies the contraction of centre boundaries is also unnecessary.

Controlling the mix of uses

- 7.31 Draft Local Plan Policies 18, 19 and 20 in combination seek to protect and control the mix of uses. The policy approach recognises the limitation in controlling uses within Use Class E, but some uses not included within Class E can be controlled i.e. betting shops, pubs, bars, hot food takeaways, cinemas and theatres.

Viability of small premises

- 7.32 The Council's land use data for 2021 indicates town centres in the Borough have a broad mix of unit sizes, which the potential space requirements indicate LBRuT should seek to retain. The majority (about 80%) of existing shop/service premises in LBRuT range from 50 to 300 sqm gross. Operator's minimum space requirements indicate there is likely to be continued demand for units within this mid-size category in the future, but demand for smaller units of between 50 to 100 sq.m should also be relatively strong. Demand for very small units under 50 sq.m gross is likely to be weaker. Small units of less than 50 sq.m will be viable for some operators but this is likely to be a small minority of premises. The provision of too many small kiosk units of around 20 sq.m gross could be harmful to the centre's ability to attract new tenants. The proportion of small shop premises under 50 sq.m in town centre should be monitored. A significant increase in the proportion of small units in a centre could be harmful to the vitality and viability of the centre.

Future monitoring

7.33

The recommendations and projections within this study will assist the Council in reviewing development plan policies over the coming years and to assist future development management decisions. The study provides an overview of the potential need for further retail and leisure development in the medium term to 2034. Longer-term projections up to 2039 are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. These uncertainties include the longer-term implications of the Covid-19 and cost of living crisis that will need to be monitored. Longer-term projections after 2034 should be treated with caution and provide broad guidance only. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

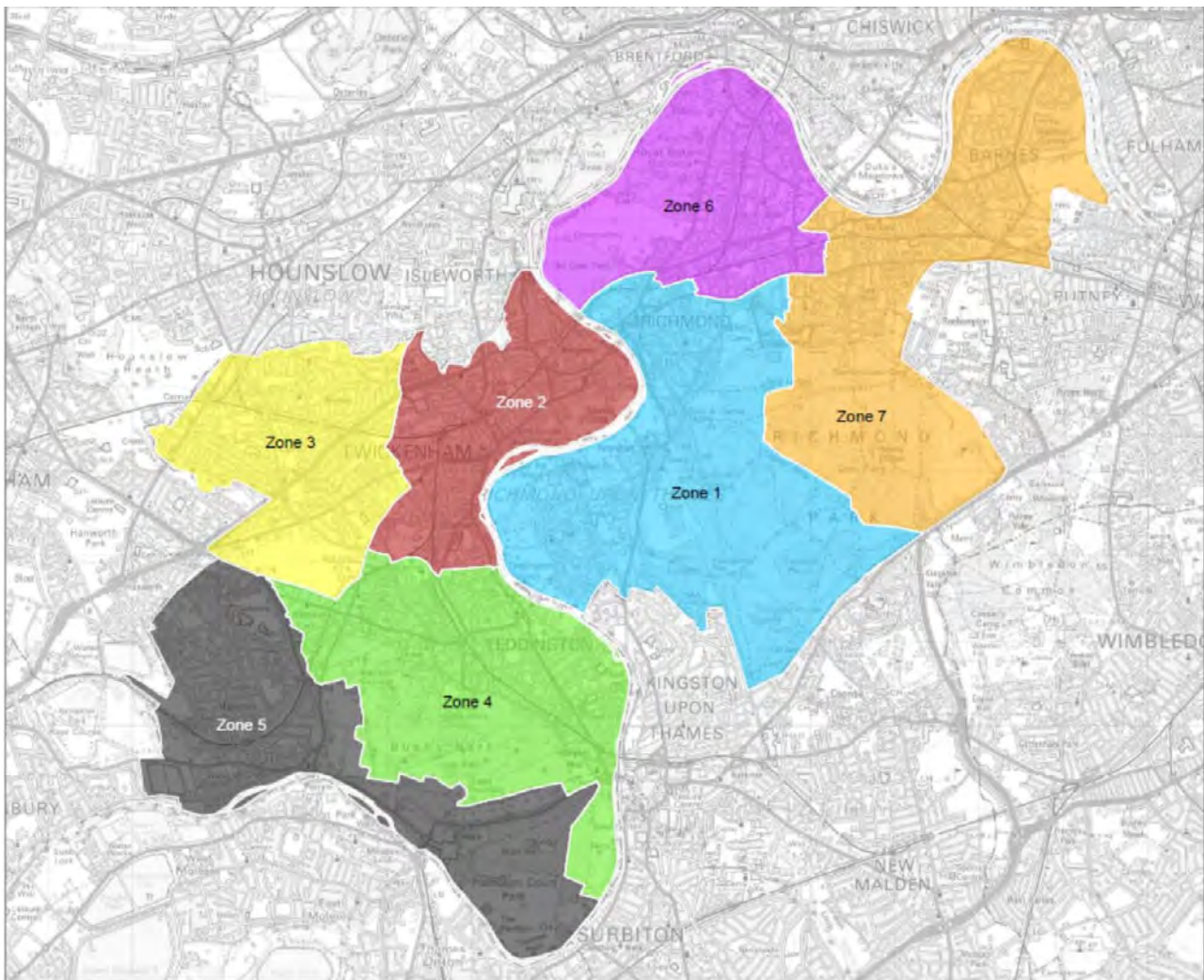
- 1 population projections;
- 2 local expenditure estimates (information from Experian or other recognised providers);
- 3 growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- 4 the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- 5 existing retail floorspace and average turnover to floorspace densities; and
- 6 implemented development within and around the study area.

7.34

These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections.

Appendix 1 **Study area and methodology**

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



Retail Capacity Assessment – Methodology and Data

Price Base

All monetary values expressed in this study are at 2020 prices, consistent with Experian’s base year expenditure figures for 2020 (Retail Planner Briefing Note 19, January 2022) which is the most up to date information available.

Retail Expenditure

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 2020 have been obtained.**

Experian’s EBS national expenditure information (Experian Retail Planner Briefing Note 19) has been used to forecast expenditure within the study area. Experian’s forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer

spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

Experian's EBS growth forecast rates for 2021, 2022 and 2023 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.2% for 2021, +0.7% for 2022 and +1.8% for 2023; for comparison goods: +1.9% for 2021, +2.1% for 2022 and +2.8% for 2023).

In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. +0.1% per annum for convenience goods after 2023 and 2.8% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading (SFT) or non-store **activity is included within Experian's Goods Based Expenditure (GBE)** estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store sales in 2020 was:

- 18.0% of convenience goods expenditure; and
- 34.1% of comparison goods expenditure.

Experian predicts that these figures will increase in the future. However, Experian recognises that not all non-store expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2013 are:

- 5.4% of convenience goods expenditure; and
- 25.6% of comparison goods expenditure.

The projections provided by Experian suggest SFT could increase to 7.0% and 28.0% by 2029 respectively, and estimated at 7.7% and 30.1% by 2039. These figures have been adopted in this assessment.

Market Shares/Penetration Rates

To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the May 2022 household survey.

Appendix 2 **Convenience Goods Assessment**

Table 1 - Study area population projections

	2022	2024	2029	2034	2039
Zone 1 - Richmond	23,247	23,229	22,861	23,005	23,783
Zone 2 - Twickenham	33,508	33,756	33,382	32,727	32,190
Zone 3 - Whitton	31,762	31,857	31,589	31,151	31,150
Zone 4 - Teddington	32,814	33,006	32,853	32,331	33,522
Zone 5 - Hampton	19,722	19,796	19,574	19,340	19,150
Zone 6 - Kew/North Richmond	23,914	24,012	24,348	25,590	25,870
Zone 7 - Barnes/East Sheen	32,439	32,757	33,260	33,496	33,105
LBRuT Total	197,406	198,413	197,867	197,640	198,770

Sources:

GLA ward level population projections - housing led 2020-based

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

	2022	2024	2029	2034	2039
Zone 1 - Richmond	3,499	3,484	3,475	3,478	3,484
Zone 2 - Twickenham	3,242	3,228	3,220	3,222	3,228
Zone 3 - Whitton	2,586	2,575	2,568	2,570	2,575
Zone 4 - Teddington	3,021	3,008	3,001	3,003	3,008
Zone 5 - Hampton	2,736	2,724	2,717	2,719	2,724
Zone 6 - Kew/North Richmond	3,341	3,326	3,318	3,320	3,326
Zone 7 - Barnes/East Sheen	3,389	3,374	3,366	3,368	3,374

Sources:

Experian Local Expenditure 2020 (2020 prices)

Experian growth rates - Retail Planner Briefing Note 19 (January 2022)

Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m)

	2022	2024	2029	2034	2039
Zone 1 - Richmond	81.34	80.93	79.45	80.00	82.85
Zone 2 - Twickenham	108.63	108.96	107.49	105.45	103.90
Zone 3 - Whitton	82.14	82.03	81.14	80.07	80.20
Zone 4 - Teddington	99.13	99.29	98.58	97.08	100.83
Zone 5 - Hampton	53.96	53.92	53.18	52.58	52.16
Zone 6 - Kew/North Richmond	79.90	79.87	80.78	84.96	86.04
Zone 7 - Barnes/East Sheen	109.94	110.53	111.94	112.81	111.69
LBRuT Total	615.03	615.52	612.55	612.96	617.68

Source: Tables 1 and 2

Table 4 - Base year 2022 convenience goods market shares by zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Zone 1 - Richmond	62.3%	13.0%	2.5%	1.5%	2.1%	56.2%	17.5%	20.0%
Zone 2 - Twickenham	3.8%	62.6%	33.1%	16.0%	17.2%	4.6%	4.4%	15.0%
Zone 3 - Whitton	0.0%	0.0%	18.3%	0.0%	0.0%	0.0%	0.0%	10.0%
Zone 4 - Teddington	2.4%	1.6%	2.9%	38.4%	2.2%	0.0%	0.0%	15.0%
Zone 5 - Hampton/Hampton Hill	0.2%	2.0%	12.2%	25.2%	69.9%	0.0%	0.0%	10.0%
Zone 6 - Kew North Richmond	1.7%	0.0%	0.3%	0.0%	0.0%	23.5%	0.7%	10.0%
Zone 7 - Barnes/East Sheen	5.3%	0.6%	0.0%	0.8%	0.0%	9.0%	55.5%	10.0%
LBRuT total	75.7%	79.8%	69.3%	81.9%	91.4%	93.3%	78.1%	
Outflow	24.3%	20.2%	30.7%	18.1%	8.6%	6.7%	21.9%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey May 2022 and Lichfields' analysis.

Table 5 - Base year 2022 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 2022	81.34	108.63	82.14	99.13	53.96	79.90	109.94		615.03
Zone 1 - Richmond	50.68	14.12	2.03	1.49	1.13	44.90	19.24	33.40	166.99
Zone 2 - Twickenham	3.09	68.00	27.19	15.86	9.28	3.68	4.84	23.28	155.22
Zone 3 - Whitton	0.00	0.00	15.03	0.00	0.00	0.00	0.00	1.67	16.70
Zone 4 - Teddington	1.95	1.74	2.38	38.07	1.19	0.00	0.00	8.00	53.32
Zone 5 - Hampton/Hampton Hill	0.16	2.17	10.02	24.98	37.72	0.00	0.00	8.34	83.39
Zone 6 - Kew North Richmond	1.38	0.00	0.25	0.00	0.00	18.78	0.77	2.35	23.53
Zone 7 - Barnes/East Sheen	4.31	0.65	0.00	0.79	0.00	7.19	61.01	8.22	82.18
LBRuT total	61.58	86.69	56.90	81.19	49.32	74.54	85.86	85.26	581.34
Outflow	19.77	21.94	25.22	17.94	4.64	5.35	24.08		118.94
TOTAL	81.34	108.63	82.12	99.13	53.96	79.90	109.94	85.26	700.27

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	80.93	108.96	82.03	99.29	53.92	79.87	110.53		615.52
Zone 1 - Richmond	50.42	14.16	2.03	1.49	1.13	44.89	19.34	33.37	166.83
Zone 2 - Twickenham	3.08	68.21	27.15	15.89	9.27	3.67	4.86	23.32	155.45
Zone 3 - Whitton	0.00	0.00	15.01	0.00	0.00	0.00	0.00	1.67	16.68
Zone 4 - Teddington	1.94	1.74	2.38	38.13	1.19	0.00	0.00	8.01	53.39
Zone 5 - Hampton/Hampton Hill	0.16	2.18	10.01	25.02	37.69	0.00	0.00	8.34	83.40
Zone 6 - Kew North Richmond	1.38	0.00	0.25	0.00	0.00	18.77	0.77	2.35	23.52
Zone 7 - Barnes/East Sheen	4.29	0.65	0.00	0.79	0.00	7.19	61.34	8.25	82.52
LBRuT total	61.26	86.95	56.83	81.32	49.28	74.52	86.32	85.30	581.78
Outflow	19.67	22.01	25.18	17.97	4.64	5.35	24.21		119.02
TOTAL	80.93	108.96	82.01	99.29	53.92	79.87	110.53	85.30	700.80

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	79.45	107.49	81.14	98.58	53.18	80.78	111.94		612.55
Zone 1 - Richmond	49.50	13.97	2.01	1.48	1.12	45.40	19.59	33.27	166.33
Zone 2 - Twickenham	3.02	67.29	26.86	15.77	9.15	3.72	4.93	23.07	153.79
Zone 3 - Whitton	0.00	0.00	14.85	0.00	0.00	0.00	0.00	1.65	16.50
Zone 4 - Teddington	1.91	1.72	2.35	37.85	1.17	0.00	0.00	7.94	52.95
Zone 5 - Hampton/Hampton Hill	0.16	2.15	9.90	24.84	37.17	0.00	0.00	8.25	82.47
Zone 6 - Kew North Richmond	1.35	0.00	0.24	0.00	0.00	18.98	0.78	2.37	23.74
Zone 7 - Barnes/East Sheen	4.21	0.64	0.00	0.79	0.00	7.27	62.13	8.34	83.38
LBRuT total	60.14	85.77	56.21	80.74	48.61	75.37	87.43	84.88	579.15
Outflow	19.31	21.71	24.91	17.84	4.57	5.41	24.52		118.27
TOTAL	79.45	107.49	81.12	98.58	53.18	80.78	111.94	84.88	697.42

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	80.00	105.45	80.07	97.08	52.58	84.96	112.81		612.96
Zone 1 - Richmond	49.84	13.71	1.98	1.46	1.10	47.75	19.74	33.90	169.48
Zone 2 - Twickenham	3.04	66.01	26.50	15.53	9.04	3.91	4.96	22.76	151.77
Zone 3 - Whitton	0.00	0.00	14.65	0.00	0.00	0.00	0.00	1.63	16.28
Zone 4 - Teddington	1.92	1.69	2.32	37.28	1.16	0.00	0.00	7.83	52.19
Zone 5 - Hampton/Hampton Hill	0.16	2.11	9.77	24.46	36.76	0.00	0.00	8.14	81.40
Zone 6 - Kew North Richmond	1.36	0.00	0.24	0.00	0.00	19.97	0.79	2.48	24.84
Zone 7 - Barnes/East Sheen	4.24	0.63	0.00	0.78	0.00	7.65	62.61	8.43	84.34
LBRuT total	60.56	84.15	55.47	79.51	48.06	79.27	88.11	85.18	580.30
Outflow	19.44	21.30	24.58	17.57	4.52	5.69	24.71		117.81
TOTAL	80.00	105.45	80.05	97.08	52.58	84.96	112.81	85.18	698.11

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	82.85	103.90	80.20	100.83	52.16	86.04	111.69		617.68
Zone 1 - Richmond	51.62	13.51	1.99	1.51	1.10	48.36	19.55	34.41	172.03
Zone 2 - Twickenham	3.15	65.04	26.55	16.13	8.97	3.96	4.91	22.71	151.43
Zone 3 - Whitton	0.00	0.00	14.68	0.00	0.00	0.00	0.00	1.63	16.31
Zone 4 - Teddington	1.99	1.66	2.33	38.72	1.15	0.00	0.00	8.09	53.93
Zone 5 - Hampton/Hampton Hill	0.17	2.08	9.78	25.41	36.46	0.00	0.00	8.21	82.11
Zone 6 - Kew North Richmond	1.41	0.00	0.24	0.00	0.00	20.22	0.78	2.52	25.17
Zone 7 - Barnes/East Sheen	4.39	0.62	0.00	0.81	0.00	7.74	61.99	8.39	83.95
LBRuT total	62.72	82.91	55.56	82.58	47.67	80.28	87.23	85.96	584.92
Outflow	20.13	20.99	24.62	18.25	4.49	5.76	24.46		118.71
TOTAL	82.85	103.90	80.18	100.83	52.16	86.04	111.69	85.96	703.63

Source: Tables 3 and 4

Table 10 - Summary of convenience goods expenditure 2022 to 2039 (£M)

	2022	2024	2029	2034	2039
Available expenditure					
Zone 1 - Richmond	166.99	166.83	166.33	169.48	172.03
Zone 2 - Twickenham	155.22	155.45	153.79	151.77	151.43
Zone 3 - Whitton	16.70	16.68	16.50	16.28	16.31
Zone 4 -Teddington	53.32	53.39	52.95	52.19	53.93
Zone 5 - Hampton/Hampton Hill	83.39	83.40	82.47	81.40	82.11
Zone 6 - Kew North Richmond	23.53	23.52	23.74	24.84	25.17
Zone 7 - Barnes/East Sheen	82.18	82.52	83.38	84.34	83.95
Total	581.34	581.78	579.15	580.30	584.92
Turnover of existing facilities					
Zone 1 - Richmond	166.99	169.83	170.51	170.51	170.51
Zone 2 - Twickenham	155.22	157.86	158.49	158.49	158.49
Zone 3 - Whitton	16.70	16.99	17.05	17.05	17.05
Zone 4 -Teddington	53.32	54.23	54.45	54.45	54.45
Zone 5 - Hampton/Hampton Hill	83.39	84.81	85.15	85.15	85.15
Zone 6 - Kew North Richmond	23.53	23.93	24.02	24.02	24.02
Zone 7 - Barnes/East Sheen	82.18	83.58	83.91	83.91	83.91
Total	581.34	591.23	593.60	593.60	593.60
Surplus/deficit expenditure £M					
Zone 1 - Richmond	0.00	-3.00	-4.18	-1.03	1.51
Zone 2 - Twickenham	0.00	-2.41	-4.70	-6.73	-7.07
Zone 3 - Whitton	0.00	-0.31	-0.56	-0.77	-0.75
Zone 4 -Teddington	0.00	-0.85	-1.50	-2.26	-0.51
Zone 5 - Hampton/Hampton Hill	0.00	-1.42	-2.68	-3.76	-3.05
Zone 6 - Kew North Richmond	0.00	-0.41	-0.29	0.82	1.14
Zone 7 - Barnes/East Sheen	0.00	-1.06	-0.53	0.43	0.04
Total	0.00	-9.45	-14.45	-13.30	-8.68

Source: Tables 5 to 9

Table 11 - Convenience goods floorspace capacity up to 2039

	2022	2024	2029	2034	2039
Turnover density new floorspace (£ per sq.m)	£12,000	£12,204	£12,253	£12,253	£12,253
Floorspace projection (sq.m net)					
Zone 1 - Richmond	0	-246	-341	-84	124
Zone 2 - Twickenham	0	-198	-384	-549	-577
Zone 3 - Whitton	0	-25	-45	-63	-61
Zone 4 - Teddington	0	-69	-123	-184	-42
Zone 5 - Hampton/Hampton Hill	0	-116	-219	-307	-249
Zone 6 - Kew North Richmond	0	-34	-23	67	93
Zone 7 - Barnes/East Sheen	0	-87	-43	35	3
Total	0	-774	-1,179	-1,085	-708
Floorspace Projection (sq.m gross)					
Zone 1 - Richmond	0	-351	-488	-120	177
Zone 2 - Twickenham	0	-282	-548	-784	-824
Zone 3 - Whitton	0	-36	-65	-90	-87
Zone 4 - Teddington	0	-99	-175	-263	-60
Zone 5 - Hampton/Hampton Hill	0	-166	-313	-438	-355
Zone 6 - Kew North Richmond	0	-48	-34	95	133
Zone 7 - Barnes/East Sheen	0	-124	-62	50	4
Total	0	-1,106	-1,684	-1,550	-1,011

Source: Table 10

Appendix 3 **Comparison Goods Assessment**

Table 1 - Study area population projections

	2022	2024	2029	2034	2039
Zone 1 - Richmond	23,247	23,229	22,861	23,005	23,783
Zone 2 - Twickenham	33,508	33,756	33,382	32,727	32,190
Zone 3 - Whitton	31,762	31,857	31,589	31,151	31,150
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Zone 6 - Kew/North Richmond	23,914	24,012	24,348	25,590	25,870
Zone 7 - Barnes/East Sheen	32,439	32,757	33,260	33,496	33,105
LBRuT Total	197,406	198,413	197,867	197,640	198,770

Sources:

GLA ward level population projections - housing led 2020-based

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

	2022	2024	2029	2034	2039
Zone 1 - Richmond	4,408	4,567	5,065	5,738	6,554
Zone 2 - Twickenham	4,142	4,291	4,760	5,392	6,159
Zone 3 - Whitton	3,306	3,424	3,798	4,303	4,915
Zone 4 - Teddington	3,957	4,099	4,547	5,151	5,883
Zone 5 -Hampton	3,619	3,749	4,158	4,711	5,381
Zone 6 - Kew/North Richmond	4,244	4,396	4,876	5,524	6,309
Zone 7 - Barnes/East Sheen	4,344	4,500	4,992	5,655	6,459

Sources:

Experian Local Expenditure 2020 (2020 prices)

Experian growth rates - Retail Planner Briefing Note 19 (January 2022)

Excludes Special Forms of Trading

Table 3 - Total comparison goods expenditure (£m)

	2022	2024	2029	2034	2039
Zone 1 - Richmond	102.47	106.08	115.80	132.01	155.88
Zone 2 - Twickenham	138.79	144.86	158.89	176.46	198.25
Zone 3 - Whitton	105.01	109.09	119.98	134.03	153.09
Zone 4 - Teddington	129.84	135.31	149.37	166.53	197.22
Zone 5 -Hampton	71.37	74.22	81.40	91.11	103.04
Zone 6 - Kew/North Richmond	101.49	105.57	118.72	141.35	163.23
Zone 7 - Barnes/East Sheen	140.92	147.42	166.02	189.41	213.82
LBRuT Total	789.89	822.54	910.17	1,030.89	1,184.53

Source: Tables 1 and 2

Table 4 - Base year 2022 comparison goods market shares by zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Zone 1 - Richmond	29.5%	21.1%	3.5%	1.3%	0.1%	39.7%	12.4%	20.0%
Zone 2 -Twickenham	2.3%	29.5%	19.1%	8.3%	10.4%	1.3%	0.2%	30.0%
Zone 3 - Whitton	0.0%	0.5%	7.7%	0.0%	0.1%	0.0%	0.0%	10.0%
Zone 4 - Teddington	1.8%	1.4%	4.5%	24.6%	8.0%	0.1%	0.5%	30.0%
Zone 5 - Hampton/Hampton Hill	0.0%	1.2%	3.5%	1.8%	11.1%	0.2%	0.0%	10.0%
Zone 6 - Kew/North Richmond	0.0%	0.0%	0.0%	0.2%	0.0%	7.0%	0.0%	10.0%
Zone 6 - Kew Retail Park	2.2%	1.8%	1.5%	0.1%	0.1%	12.5%	5.4%	35.0%
Zone 7 - Barnes/East Sheen	1.2%	0.3%	0.2%	1.1%	0.0%	4.9%	37.7%	10.0%
LBRuT total	37.0%	55.8%	40.0%	37.4%	29.8%	65.7%	56.2%	
Outflow	63.0%	44.2%	60.0%	62.6%	70.2%	34.3%	43.8%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey May 2022 and Lichfields' analysis.

Table 5 - Base year 2022 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 2022	102.47	138.79	105.01	129.84	71.37	101.49	140.92		789.89
Zone 1 - Richmond	30.23	29.28	3.68	1.69	0.07	40.29	17.47	30.68	153.39
Zone 2 -Twickenham	2.36	40.94	20.06	10.78	7.42	1.32	0.28	35.64	118.80
Zone 3 - Whitton	0.00	0.69	8.09	0.00	0.07	0.00	0.00	0.98	9.83
Zone 4 - Teddington	1.84	1.94	4.73	31.94	5.71	0.10	0.70	20.13	67.10
Zone 5 - Hampton/Hampton Hill	0.00	1.67	3.68	2.34	7.92	0.20	0.00	1.76	17.56
Zone 6 - Kew/North Richmond	0.00	0.00	0.00	0.26	0.00	7.10	0.00	0.82	8.18
Zone 6 - Kew Retail Park	2.25	2.50	1.58	0.13	0.07	12.69	7.61	14.44	41.27
Zone 7 - Barnes/East Sheen	1.23	0.42	0.21	1.43	0.00	4.97	53.12	6.82	68.20
LBRuT total	37.91	77.44	42.00	48.56	21.27	66.68	79.19	111.27	484.34
Outflow	64.56	61.35	63.00	81.28	50.10	34.81	61.72		416.83
TOTAL	102.47	138.79	105.01	129.84	71.37	101.49	140.92	111.27	901.16

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	106.08	144.86	109.09	135.31	74.22	105.57	147.42		822.54
Zone 1 - Richmond	31.29	30.56	3.82	1.76	0.07	41.91	18.28	31.93	159.63
Zone 2 -Twickenham	2.44	42.73	20.84	11.23	7.72	1.37	0.29	37.13	123.75
Zone 3 - Whitton	0.00	0.72	8.40	0.00	0.07	0.00	0.00	1.02	10.22
Zone 4 - Teddington	1.91	2.03	4.91	33.29	5.94	0.11	0.74	20.96	69.87
Zone 5 - Hampton/Hampton Hill	0.00	1.74	3.82	2.44	8.24	0.21	0.00	1.83	18.27
Zone 6 - Kew/North Richmond	0.00	0.00	0.00	0.27	0.00	7.39	0.00	0.85	8.51
Zone 6 - Kew Retail Park	2.33	2.61	1.64	0.14	0.07	13.20	7.96	15.05	42.99
Zone 7 - Barnes/East Sheen	1.27	0.43	0.22	1.49	0.00	5.17	55.58	7.13	71.29
LBRuT total	39.25	80.83	43.64	50.60	22.12	69.36	82.85	115.89	504.54
Outflow	66.83	64.03	65.45	84.70	52.10	36.21	64.57		433.90
TOTAL	106.08	144.86	109.09	135.31	74.22	105.57	147.42	115.89	938.43

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	115.80	158.89	119.98	149.37	81.40	118.72	166.02		910.17
Zone 1 - Richmond	34.16	33.53	4.20	1.94	0.08	47.13	20.59	35.41	177.03
Zone 2 - Twickenham	2.66	46.87	22.92	12.40	8.47	1.54	0.33	40.80	135.99
Zone 3 - Whitton	0.00	0.79	9.24	0.00	0.08	0.00	0.00	1.12	11.24
Zone 4 - Teddington	2.08	2.22	5.40	36.75	6.51	0.12	0.83	23.11	77.02
Zone 5 - Hampton/Hampton Hill	0.00	1.91	4.20	2.69	9.03	0.24	0.00	2.01	20.07
Zone 6 - Kew/North Richmond	0.00	0.00	0.00	0.30	0.00	8.31	0.00	0.96	9.57
Zone 6 - Kew Retail Park	2.55	2.86	1.80	0.15	0.08	14.84	8.97	16.82	48.07
Zone 7 - Barnes/East Sheen	1.39	0.48	0.24	1.64	0.00	5.82	62.59	8.02	80.17
LBRuT total	42.84	88.66	47.99	55.87	24.26	78.00	93.30	128.24	559.16
Outflow	72.95	70.23	71.99	93.51	57.14	40.72	72.72		479.25
TOTAL	115.80	158.89	119.98	149.37	81.40	118.72	166.02	128.24	1,038.41

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	132.01	176.46	134.03	166.53	91.11	141.35	189.41		1,030.89
Zone 1 - Richmond	38.94	37.23	4.69	2.16	0.09	56.12	23.49	40.68	203.41
Zone 2 - Twickenham	3.04	52.06	25.60	13.82	9.48	1.84	0.38	45.52	151.72
Zone 3 - Whitton	0.00	0.88	10.32	0.00	0.09	0.00	0.00	1.25	12.55
Zone 4 - Teddington	2.38	2.47	6.03	40.97	7.29	0.14	0.95	25.81	86.03
Zone 5 - Hampton/Hampton Hill	0.00	2.12	4.69	3.00	10.11	0.28	0.00	2.24	22.45
Zone 6 - Kew/North Richmond	0.00	0.00	0.00	0.33	0.00	9.89	0.00	1.14	11.36
Zone 6 - Kew Retail Park	2.90	3.18	2.01	0.17	0.09	17.67	10.23	19.52	55.76
Zone 7 - Barnes/East Sheen	1.58	0.53	0.27	1.83	0.00	6.93	71.41	9.17	91.72
LBRuT total	48.84	98.46	53.61	62.28	27.15	92.87	106.45	145.33	635.00
Outflow	83.16	78.00	80.42	104.25	63.96	48.48	82.96		541.22
TOTAL	132.01	176.46	134.03	166.53	91.11	141.35	189.41	145.33	1,176.22

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	155.88	198.25	153.09	197.22	103.04	163.23	213.82		1,184.53
Zone 1 - Richmond	45.98	41.83	5.36	2.56	0.10	64.80	26.51	46.79	233.94
Zone 2 - Twickenham	3.59	58.48	29.24	16.37	10.72	2.12	0.43	51.83	172.78
Zone 3 - Whitton	0.00	0.99	11.79	0.00	0.10	0.00	0.00	1.43	14.31
Zone 4 - Teddington	2.81	2.78	6.89	48.52	8.24	0.16	1.07	30.20	100.66
Zone 5 - Hampton/Hampton Hill	0.00	2.38	5.36	3.55	11.44	0.33	0.00	2.56	25.61
Zone 6 - Kew/North Richmond	0.00	0.00	0.00	0.39	0.00	11.43	0.00	1.31	13.13
Zone 6 - Kew Retail Park	3.43	3.57	2.30	0.20	0.10	20.40	11.55	22.37	63.91
Zone 7 - Barnes/East Sheen	1.87	0.59	0.31	2.17	0.00	8.00	80.61	10.39	103.94
LBRuT total	57.68	110.62	61.24	73.76	30.71	107.24	120.17	166.89	728.30
Outflow	98.20	87.63	91.85	123.46	72.33	55.99	93.65		623.12
TOTAL	155.88	198.25	153.09	197.22	103.04	163.23	213.82	166.89	1,351.42

Source: Tables 3 and 4

Table 10 - Summary of comparison goods expenditure 2022 to 2039 (£M)

	2022	2024	2029	2034	2039
Available expenditure					
Zone 1 - Richmond	153.39	159.63	177.03	203.41	233.94
Zone 2 -Twickenham	118.80	123.75	135.99	151.72	172.78
Zone 3 - Whitton	9.83	10.22	11.24	12.55	14.31
Zone 4 - Teddington	67.10	69.87	77.02	86.03	100.66
Zone 5 - Hampton/Hampton Hill	17.56	18.27	20.07	22.45	25.61
Zone 6 - Kew/North Richmond	8.18	8.51	9.57	11.36	13.13
Zone 6 - Kew Retail Park	41.27	42.99	48.07	55.76	63.91
Zone 7 - Barnes/East Sheen	68.20	71.29	80.17	91.72	103.94
Total	484.34	504.54	559.16	635.00	728.30
Turnover of existing facilities					
Zone 1 - Richmond	153.39	160.37	179.51	204.09	232.04
Zone 2 -Twickenham	118.80	124.20	139.02	158.06	179.70
Zone 3 - Whitton	9.83	10.28	11.51	13.08	14.88
Zone 4 - Teddington	67.10	70.15	78.52	89.28	101.50
Zone 5 - Hampton/Hampton Hill	17.56	18.36	20.55	23.36	26.56
Zone 6 - Kew/North Richmond	8.18	8.55	9.58	10.89	12.38
Zone 6 - Kew Retail Park	41.27	43.15	48.29	54.91	62.43
Zone 7 - Barnes/East Sheen	68.20	71.31	79.81	90.74	103.17
Total	484.34	506.38	566.79	644.41	732.65
Surplus/deficit expenditure £M					
Zone 1 - Richmond	0.00	-0.75	-2.47	-0.68	1.91
Zone 2 -Twickenham	0.00	-0.45	-3.04	-6.34	-6.92
Zone 3 - Whitton	0.00	-0.06	-0.27	-0.54	-0.56
Zone 4 - Teddington	0.00	-0.28	-1.50	-3.25	-0.84
Zone 5 - Hampton/Hampton Hill	0.00	-0.09	-0.47	-0.92	-0.95
Zone 6 - Kew/North Richmond	0.00	-0.04	-0.01	0.48	0.76
Zone 6 - Kew Retail Park	0.00	-0.16	-0.23	0.85	1.49
Zone 7 - Barnes/East Sheen	0.00	-0.01	0.36	0.97	0.77
Total	0.00	-1.84	-7.64	-9.41	-4.35

Source: Tables 5 to 9

Table 11 - Comparison goods floorspace capacity up to 2040

	2022	2024	2029	2034	2039
Turnover density new floorspace (£ per sq.m)	£7,000	£7,319	£8,192	£9,313	£10,589
Floorspace projection (sq.m net)					
Zone 1 - Richmond	0	-102	-302	-73	180
Zone 2 -Twickenham	0	-62	-371	-680	-654
Zone 3 - Whitton	0	-8	-33	-58	-53
Zone 4 - Teddington	0	-38	-184	-349	-80
Zone 5 - Hampton/Hampton Hill	0	-12	-58	-98	-90
Zone 6 - Kew/North Richmond	0	-6	-1	51	71
Zone 6 - Kew Retail Park	0	-21	-28	92	140
Zone 7 - Barnes/East Sheen	0	-2	44	105	73
Total	0	-251	-932	-1,011	-411
Floorspace Projection (sq.m gross)					
Zone 1 - Richmond	0	-136	-403	-98	240
Zone 2 -Twickenham	0	-82	-494	-907	-872
Zone 3 - Whitton	0	-11	-44	-77	-71
Zone 4 - Teddington	0	-51	-245	-465	-106
Zone 5 - Hampton/Hampton Hill	0	-16	-77	-131	-120
Zone 6 - Kew/North Richmond	0	-8	-2	68	95
Zone 6 - Kew Retail Park	0	-29	-37	122	187
Zone 7 - Barnes/East Sheen	0	-2	59	139	98
Total	0	-335	-1,243	-1,348	-548

Source: Table 10

Appendix 4 **Food and Beverage Assessment**

Table 1 - Study area population projections

	2022	2024	2029	2034	2039
Zone 1 - Richmond	23,247	23,229	22,861	23,005	23,783
Zone 2 - Twickenham	33,508	33,756	33,382	32,727	32,190
Zone 3 - Whitton	31,762	31,857	31,589	31,151	31,150
Zone 4 - Teddington	32,814	33,006	32,853	32,331	33,522
Zone 5 -Hampton	19,722	19,796	19,574	19,340	19,150
Zone 6 - Kew/North Richmond	23,914	24,012	24,348	25,590	25,870
Zone 7 - Barnes/East Sheen	32,439	32,757	33,260	33,496	33,105
LBRuT Total	197,406	198,413	197,867	197,640	198,770

Sources:

GLA ward level population projections - housing led 2020-based

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

	2022	2024	2029	2034	2039
Zone 1 - Richmond	2,799	2,858	3,012	3,150	3,295
Zone 2 - Twickenham	2,756	2,814	2,967	3,103	3,245
Zone 3 - Whitton	1,779	1,817	1,915	2,003	2,094
Zone 4 - Teddington	2,493	2,546	2,683	2,806	2,935
Zone 5 -Hampton	1,965	2,007	2,115	2,212	2,313
Zone 6 - Kew/North Richmond	2,796	2,855	3,009	3,147	3,291
Zone 7 - Barnes/East Sheen	2,785	2,844	2,998	3,135	3,279

Sources:

Experian Local Expenditure 2020 (2020 prices)

Experian growth rates - Retail Planner Briefing Note 19 (January 2022)

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

	2022	2024	2029	2034	2039
Zone 1 - Richmond	65.07	66.38	68.87	72.48	78.36
Zone 2 - Twickenham	92.35	95.00	99.04	101.54	104.45
Zone 3 - Whitton	56.50	57.87	60.49	62.39	65.24
Zone 4 - Teddington	81.81	84.02	88.16	90.73	98.39
Zone 5 -Hampton	38.75	39.72	41.40	42.78	44.30
Zone 6 - Kew/North Richmond	66.86	68.55	73.27	80.53	85.14
Zone 7 - Barnes/East Sheen	90.34	93.16	99.70	105.01	108.54
LBRuT Total	491.69	504.70	530.93	555.47	584.43

Source: Tables 1 and 2

Table 4 - Base year 2022 food/beverage market shares by zone (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Zone 1 - Richmond	53.2%	20.8%	10.2%	2.8%	2.8%	33.4%	14.9%	40.0%
Zone 2 - Twickenham	6.3%	55.3%	31.7%	5.1%	14.4%	1.2%	1.1%	30.0%
Zone 3 - Whitton	0.0%	0.2%	15.7%	0.0%	0.3%	0.0%	0.1%	30.0%
Zone 4 - Teddington	11.4%	5.4%	15.5%	65.5%	42.8%	0.6%	0.3%	20.0%
Zone 5 - Hampton/Hampton Hill	0.3%	0.0%	0.7%	1.1%	18.7%	2.6%	0.0%	20.0%
Zone 6 -Kew/North Richmond	0.1%	1.2%	0.2%	0.0%	0.0%	21.2%	3.0%	20.0%
Zone 7 - Barnes/East Sheen	0.7%	1.8%	0.1%	0.0%	0.5%	2.8%	59.2%	20.0%
LBRuT total	72.0%	84.7%	74.1%	74.5%	79.5%	61.8%	78.6%	
Outflow	28.0%	15.3%	25.9%	25.5%	20.5%	38.2%	21.4%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey May 2022 and Lichfields' analysis.

Table 5 - Base year 2022 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 2022	65.07	92.35	56.50	81.81	38.75	66.86	90.34		491.69
Zone 1 - Richmond	34.62	19.21	5.76	2.29	1.09	22.33	13.46	65.84	164.60
Zone 2 - Twickenham	4.10	51.07	17.91	4.17	5.58	0.80	0.99	36.27	120.90
Zone 3 - Whitton	0.00	0.18	8.87	0.00	0.12	0.00	0.09	3.97	13.23
Zone 4 - Teddington	7.42	4.99	8.76	53.58	16.59	0.40	0.27	23.00	115.01
Zone 5 - Hampton/Hampton Hill	0.20	0.00	0.40	0.90	7.25	1.74	0.00	2.62	13.09
Zone 6 -Kew/North Richmond	0.07	1.11	0.11	0.00	0.00	14.18	2.71	4.54	22.71
Zone 7 - Barnes/East Sheen	0.46	1.66	0.06	0.00	0.19	1.87	53.48	14.43	72.15
LBRuT total	46.85	78.22	41.87	60.94	30.81	41.32	71.01	150.67	521.69
Outflow	18.22	14.13	14.63	20.86	7.94	25.54	19.33		120.66
TOTAL	65.07	92.35	56.50	81.81	38.75	66.86	90.34	150.67	642.36

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	66.38	95.00	57.87	84.02	39.72	68.55	93.16		504.70
Zone 1 - Richmond	35.31	19.76	5.90	2.35	1.11	22.89	13.88	67.48	168.70
Zone 2 - Twickenham	4.18	52.54	18.35	4.29	5.72	0.82	1.02	37.25	124.17
Zone 3 - Whitton	0.00	0.19	9.09	0.00	0.12	0.00	0.09	4.07	13.55
Zone 4 - Teddington	7.57	5.13	8.97	55.04	17.00	0.41	0.28	23.60	117.99
Zone 5 - Hampton/Hampton Hill	0.20	0.00	0.41	0.92	7.43	1.78	0.00	2.68	13.42
Zone 6 -Kew/North Richmond	0.07	1.14	0.12	0.00	0.00	14.53	2.79	4.66	23.31
Zone 7 - Barnes/East Sheen	0.46	1.71	0.06	0.00	0.20	1.92	55.15	14.87	74.37
LBRuT total	47.79	80.47	42.88	62.60	31.58	42.36	73.22	154.62	535.52
Outflow	18.59	14.54	14.99	21.43	8.14	26.18	19.94		123.80
TOTAL	66.38	95.00	57.87	84.02	39.72	68.55	93.16	154.62	659.32

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	68.87	99.04	60.49	88.16	41.40	73.27	99.70		530.93
Zone 1 - Richmond	36.64	20.60	6.17	2.47	1.16	24.47	14.86	70.91	177.27
Zone 2 - Twickenham	4.34	54.77	19.18	4.50	5.96	0.88	1.10	38.88	129.60
Zone 3 - Whitton	0.00	0.20	9.50	0.00	0.12	0.00	0.10	4.25	14.17
Zone 4 - Teddington	7.85	5.35	9.38	57.75	17.72	0.44	0.30	24.69	123.47
Zone 5 - Hampton/Hampton Hill	0.21	0.00	0.42	0.97	7.74	1.90	0.00	2.81	14.06
Zone 6 -Kew/North Richmond	0.07	1.19	0.12	0.00	0.00	15.53	2.99	4.98	24.88
Zone 7 - Barnes/East Sheen	0.48	1.78	0.06	0.00	0.21	2.05	59.03	15.90	79.51
LBRuT total	49.58	83.89	44.82	65.68	32.92	45.28	78.37	162.42	562.96
Outflow	19.28	15.15	15.67	22.48	8.49	27.99	21.34		130.40
TOTAL	68.87	99.04	60.49	88.16	41.40	73.27	99.70	162.42	693.35

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	72.48	101.54	62.39	90.73	42.78	80.53	105.01		555.47
Zone 1 - Richmond	38.56	21.12	6.36	2.54	1.20	26.90	15.65	74.88	187.21
Zone 2 - Twickenham	4.57	56.15	19.78	4.63	6.16	0.97	1.16	40.03	133.44
Zone 3 - Whitton	0.00	0.20	9.79	0.00	0.13	0.00	0.11	4.38	14.62
Zone 4 - Teddington	8.26	5.48	9.67	59.43	18.31	0.48	0.32	25.49	127.45
Zone 5 - Hampton/Hampton Hill	0.22	0.00	0.44	1.00	8.00	2.09	0.00	2.94	14.68
Zone 6 -Kew/North Richmond	0.07	1.22	0.12	0.00	0.00	17.07	3.15	5.41	27.05
Zone 7 - Barnes/East Sheen	0.51	1.83	0.06	0.00	0.21	2.25	62.17	16.76	83.79
LBRuT total	52.18	86.01	46.23	67.60	34.01	49.77	82.54	169.89	588.23
Outflow	20.29	15.54	16.16	23.14	8.77	30.76	22.47		137.13
TOTAL	72.48	101.54	62.39	90.73	42.78	80.53	105.01	169.89	725.36

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	78.36	104.45	65.24	98.39	44.30	85.14	108.54		584.43
Zone 1 - Richmond	41.69	21.73	6.65	2.75	1.24	28.44	16.17	79.12	197.79
Zone 2 - Twickenham	4.94	57.76	20.68	5.02	6.38	1.02	1.19	41.57	138.56
Zone 3 - Whitton	0.00	0.21	10.24	0.00	0.13	0.00	0.11	4.58	15.28
Zone 4 - Teddington	8.93	5.64	10.11	64.44	18.96	0.51	0.33	27.23	136.16
Zone 5 - Hampton/Hampton Hill	0.24	0.00	0.46	1.08	8.28	2.21	0.00	3.07	15.34
Zone 6 -Kew/North Richmond	0.08	1.25	0.13	0.00	0.00	18.05	3.26	5.69	28.46
Zone 7 - Barnes/East Sheen	0.55	1.88	0.07	0.00	0.22	2.38	64.26	17.34	86.70
LBRuT total	56.42	88.47	48.34	73.30	35.22	52.62	85.31	178.60	618.29
Outflow	21.94	15.98	16.90	25.09	9.08	32.52	23.23		144.74
TOTAL	78.36	104.45	65.24	98.39	44.30	85.14	108.54	178.60	763.03

Source: Tables 3 and 4

Table 10 - Summary of food/beverage expenditure 2022 to 2039 (£M)

	2022	2024	2029	2034	2039
Available expenditure					
Zone 1 - Richmond	164.60	168.70	177.27	187.21	197.79
Zone 2 - Twickenham	120.90	124.17	129.60	133.44	138.56
Zone 3 - Whitton	13.23	13.55	14.17	14.62	15.28
Zone 4 - Teddington	115.01	117.99	123.47	127.45	136.16
Zone 5 - Hampton/Hampton Hill	13.09	13.42	14.06	14.68	15.34
Zone 6 -Kew/North Richmond	22.71	23.31	24.88	27.05	28.46
Zone 7 - Barnes/East Sheen	72.15	74.37	79.51	83.79	86.70
Total	521.69	535.52	562.96	588.23	618.29
Turnover of existing facilities					
Zone 1 - Richmond	164.60	166.25	170.44	174.75	179.16
Zone 2 - Twickenham	120.90	122.11	125.19	128.35	131.60
Zone 3 - Whitton	13.23	13.36	13.70	14.05	14.40
Zone 4 - Teddington	115.01	116.16	119.09	122.10	125.18
Zone 5 - Hampton/Hampton Hill	13.09	13.23	13.56	13.90	14.25
Zone 6 -Kew/North Richmond	22.71	22.94	23.52	24.12	24.72
Zone 7 - Barnes/East Sheen	72.15	72.88	74.72	76.60	78.54
Total	521.69	526.92	540.23	553.87	567.86
Surplus/deficit expenditure £M					
Zone 1 - Richmond	0.00	2.45	6.83	12.46	18.63
Zone 2 - Twickenham	0.00	2.06	4.40	5.08	6.97
Zone 3 - Whitton	0.00	0.19	0.47	0.57	0.87
Zone 4 - Teddington	0.00	1.84	4.38	5.35	10.98
Zone 5 - Hampton/Hampton Hill	0.00	0.20	0.50	0.78	1.09
Zone 6 -Kew/North Richmond	0.00	0.37	1.36	2.93	3.74
Zone 7 - Barnes/East Sheen	0.00	1.50	4.79	7.19	8.16
Total	0.00	8.59	22.73	34.36	50.43

Source: Tables 5 to 9

Table 11 - Food/beverage floorspace capacity up to 2039

	2022	2024	2029	2034	2039
Turnover density new floorspace (£ per sq.m)	£6,000	£6,060	£6,213	£6,370	£6,531
Floorspace projection (sq.m gross)					
Richmond	0	404	1,099	1,956	2,853
Twickenham	0	340	709	798	1,067
Teddington	0	31	75	89	134
Whitton	0	303	705	839	1,681
East Sheen	0	33	80	123	166
Barnes	0	61	218	460	572
Other LBRuT	0	247	772	1,128	1,249
Total	0	1,418	3,658	5,394	7,722

Source: Table 10

Appendix 5 **Town Centres Analysis**

Richmond Major Centre

Richmond is the largest centre in the Borough and is **identified as a ‘Major Centre’** in the London Plan. Located centrally in the Borough, it has a strategic shopping role providing retail, leisure and service floorspace with a relatively high proportion of comparison goods relative to convenience. The centre attracts customers from the Borough and across west London.

The town centre is focused along Kew Road, The Quadrant, George Street and Hill Street (the A307) but also extends along roads running off the main shopping streets including Red Lion Street, Paradise Road, King Street, Sheen Road and notably roads running towards Richmond Green. It benefits from high quality green and blue spaces notably the River Thames Towpath, Richmond Riverside, Richmond Green, Bridge House Gardens, Rotary Gardens, as well as those in close proximity including the Old Deer Park adjacent to the south and west of the centre. Kew Gardens is located at some distance to the north and west of the town centre and is a key tourist attraction in west London.

The main Key Shopping Frontage (KSF) is concentrated along George Street and Hill Street (the A307). However, the KSF also extends along King Street, Sheen Road and Hill Rise and smaller side roads. The north of the town centre, near the centre boundary, contains fewer main town centre uses i.e. offices.

The key roles of Richmond include:

- convenience shopping: including bakery/cafes (x8), confectioners (x2), delicatessens (x2), sandwich shops (x2), an off license, an ice cream shop and a tea and coffee merchant. There are several convenience stores including **Tesco Express, Amazon Fresh, Sainsbury’s Local, Whole Foods**, independent stores and a large Waitrose supermarket;
- comparison shopping: a good proportion of multiple (and independent) retailers selling a range of higher and lower order comparison goods;
- services: provides a good range of high street national banks/building societies and independent cafés/restaurants. Limited proportion of hot food takeaways and convenience units given its size;
- entertainment and evening economy: reasonable range of pubs but a good range of restaurants and takeaways. There are also two cinemas and a theatre;
- community facilities: including four dentists, two cinemas, a chiropractor, martial arts studio, medical services, nightclub, osteopath, theatre, yoga studio, library and several churches.

Mix of uses and occupier representation

Richmond has 344 retail and service units. The diversity of uses within the centre is set out in Table R1, compared with the Goad Plan national average and the Borough average.

The mix of uses in Richmond centre broadly reflects the UK and Borough average in 2021, but there are several differences. The centre has a higher proportion of comparison retail units compared with both the national and Borough average and a higher proportion of restaurants/cafés and financial/professional services. Conversely, the centre has a lower proportion of convenience retailers, hot food takeaways and other non-retail services.

There were 43 vacant units at the time of LBRuT’s Land Use Survey 2021, a vacancy rate of **12.5%**, which is higher than the Borough average but lower than the UK average. The vacancy rate is considerably higher than in the 2014 Retail Study where there were only 22 vacant units. It is likely that this can be attributed to the Covid19 Pandemic, given its similarity to the UK average.

Table R1 - Mix of shop and service uses – Richmond

Type	Number units	% units	LBRuT average	UK average
Comparison goods retail	116	33.7	27.7	29.0
Convenience goods retail	26	7.6	11.7	9.7
Financial/professional services	36	10.5	8.1	9.0
Restaurants/cafés	59	17.2	15.3	10.0
Pubs/bars	11	3.2	2.7	4.9
Hot food takeaways	5	1.5	3.8	6.2
Other non-retail services	48	14.0	20.6	16.5
Vacant	43	12.5	10.1	14.7
Total	344	100.0	100.0	100.0

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

Richmond town centre has a good selection of comparison shops (116), the highest of all centres in the Borough. Only one category is not represented i.e. cars, motorcycles and accessories. The centre only has one unit representing the following comparison shop categories: variety, department and catalogue, and florists, nurserymen and seedsmen. Table R2 provides a breakdown of comparison shop units by category. The choice of shops in many categories is strong.

Table R2 - Mix of comparison goods uses – Richmond

Type	Number units	% units	LBRuT average	UK average
Clothing and footwear	39	33.6	14.4	21.5
Furniture, carpets and textiles	10	8.6	16.8	7.6
Books, arts, cards and stationers	7	6.0	5.7	7.7
Electrical, music and photography	5	4.3	7.6	9.1
DIY, hardware and homeware	3	2.6	6.0	6.6
China, glass and gifts	6	5.2	4.8	5.3
Cars, motorcycles and accessories	0	0.0	1.1	1.3
Chemists, drug stores and opticians	15	12.9	14.7	11.7
Variety, department and catalogue	1	0.9	0.3	1.8
Florists, nurserymen and seedsmen	1	0.9	4.4	2.2
Toys, hobby, cycle and sports	6	5.2	3.9	5.3
Jewellers	9	7.8	2.7	5.0
Charity and second-hand shops	5	4.3	7.4	9.9
Other comparison good retailers	9	7.8	10.2	5.0
Total	116	100.0	100.0	100.0

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

There is a significantly higher proportion of clothing and footwear units compared with the national average. The centre also has a higher proportion of jewellers but there is a lower than average proportion of electrical, music and photography; DIY, hardware and homeware; florists, nurserymen and seedsmen and charity and second-hand shops. Overall, Richmond has a good range and choice of comparison goods outlets, reflecting its size and role in the retail hierarchy. National multiple comparison retailers include:

Table R3 – Richmond’s comparison multiples

Accessorize	Anthropologie	Aesop	Boots the Chemist
Boots Optician	Claire’s	Clarks	Crew Clothing
EE	Flying Tiger Copenhagen	H&M	Holland and Barrett
Jigsaw	Jojo Maman Bebe	Lululemon Athletica	M&S
Mountain Warehouse	O2	Office	Oliver Bonas
Reiss	Ryman	Snappy Snaps	Specsavers
Timpson	Trail finders	Vodafone	Waterstones
Whistles	Whole Foods	WHSmith	Zara Home

Source: LBRuT land use survey 2021

Richmond centre has an excellent range of service uses (159 units), as shown in Table R4, the highest number out of all five town centres in the Borough.

The centre has a good choice of restaurants/cafés higher than the Borough and UK average. However, there is a lower proportion of hairdressers/beauty parlours; fast food/takeaways and betting shops/casinos/amusement when compared with the national and Borough average. Multiple food/beverage outlets include Costa, Five Guys, Joe and the Juice, McDonalds, Wagamama and **Nando’s**.

Table R4 - Mix of service uses – Richmond

Type	Number Units	% units	LBRuT average	UK average
Restaurants/cafés	59	40.7	35.4	23.8
Fast food/takeaways	5	3.4	8.7	14.7
Pubs/bars	11	7.6	6.2	11.7
Banks/other financial services	12	8.3	3.5	8.6
Betting shops/casinos/amusement	2	1.4	1.6	3.8
Estate agents/valuers	16	11.0	9.6	7.9
Travel agents	3	2.1	0.7	1.7
Hairdressers/beauty parlours	33	22.8	28.1	26.1
Launderettes/dry cleaners	4	2.8	6.2	1.7
Sub-total	145	100.0	100.0	100.0
Other	14			
Total	159			

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

Commercial rents (VOA 2017)

According to the VOA, Zone A retail rents vary significantly throughout the centre. Richmond town centre has the highest prime pitch rental levels of the five town centres which is likely a reflection of how well the centre is doing. Zone A rents along George Street represent the prime pitch at £2,100 per sqm. Zone A retail rents remain relatively consistent along Hill Street and The Quadrant ranging from £1,200 to £1,400 per sqm. At the southern part of the centre, along Hill Rise, Zone A retail rents range from £725 to £950. The lowest Zone A rents are found at the northernmost part of Kew Road, on the northern boundary of the centre, at £575. Overall, Richmond town centre provides the biggest range in the premises costs when compared with the other four centres; however, rates are medium to high throughout.

Catchment area

Richmond's local catchment area includes the wards of South Richmond and Ham, Petersham and Richmond Riverside. The household survey results indicate that 66% of respondents across the study area had used shops and services in Richmond town centre in the last year, which is the highest of the five town centres in the Borough. In the local area (Zone 1), 84% had visited the centre. In the study area, 16% of households suggested they do most of their non-food shopping in Richmond town centre, the second highest proportion for all shopping destinations after Kingston upon Thames town centre (29%). However, internet shopping was the highest at 30%.

The retail capacity analysis suggests Richmond town centre attracts about 24% of its trade from the local Zone 1 but attracts reasonably high levels of trade from the five other zones in the Borough. The centre has a relatively wide catchment area when compared with other town centres in the Borough.

London Plan indicators

The London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. **Richmond's** designations are:

- Network classification: Major centre
- Night-time classification: NT2 (regional/sub-regional significance)
- Commercial growth potential: High (high levels of retail, leisure or office demand)
- Residential growth potential: Incremental
- Office guidelines: A/B
- Strategic area for regeneration: No

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Richmond town centre in the last year. Of those who had used shops/services in Richmond town centre, respondents were asked what they like about Richmond town centre and what would encourage them to visit more often. The main factor liked in Richmond town centre was the attractive environment/nice place (28%). The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: close to home (21%); good cafes/restaurants (14%); good range of independent shops (7%); good range of non-food shops generally (7%); good range of clothes shops (5%); familiar/know where everything is (5%) and good range of 'high street' retailers (5%).

- *improvements*: fewer empty shops (12%); better/more non-food shops generally (12%); better/more independent shops (11%); better/more clothing shops (10%); more car parking spaces (7%); better/more quality shops (7%); cheaper car parking (5%) and less traffic congestion (5%).

Richmond town centre rates most favourably in terms of its environmental quality and cafe/restaurant offer when compared with other five town centres. The centre rates least favourably in terms of empty shops.

Accessibility

The household survey results suggest Richmond attracts customers by a variety of means of transport. Mode of travel for food shopping within the local area (Zone 1) is in line with the study area average. 50% travel by car, followed by walking (31%) and bus/coach (15%). The study average has a slightly higher proportion of car travel (54%), followed by walking (28%) and bus is much lower (8%).

For non-food shopping, Richmond town centre attracts a good mix of car, bus and walking customers, which suggests high levels of accessibility. 45% walk, 18% travel by bus and 17% by car.

Richmond town centre has excellent public transport accessibility. Public Transport Accessibility Levels (PTAL) are 6a across the centre, the second highest rating (Source: TFL WebCAT tool). Richmond railway station, an Art Deco building built in 1937, is in the north of the centre (London Transport Zone 4). Richmond is on the Waterloo-to-Reading mainline and services also run to North and East London and the London Waterloo loop. It is also the terminus for one of the branches of the London **Underground's District** Line. Good amounts of parking for vehicles and bikes are provided at the station.

Richmond bus station is in the south of the centre. 12 bus routes run through the town centre providing good access to other centres within the Borough and other parts of London including Hounslow, Ealing and Heathrow Terminal 5. Key bus routes include numbers 33, 65, 110, 371, 490, 969, H37, N68, R70.

The centre is well served by car parks. Larger car parks include Old Deer Park and the Old Deer Park Extension. Multi-storey car parks can be found on Paradise Road and the Quadrant. Other car parks include Richmond Riverside, Richmond Station, Friars Lane (circa 80 metres outside of the town centre boundary) and Pools on the Park (circa 60 metres north of the centre boundary). Richmond Residents, with a RichmondCard or have registered with RingGo can get free parking for stays up to 30 minutes or pay the reduced tariffs for longer stays. Waitrose, located on Sheen Road, provides parking for qualifying customers (minimum spend and time-limited). On-street parking is available within Controlled Parking Zones (CPZs) A1 (Richmond Town) and A2. Both operate Monday-Saturday 8:30-18:30. Part of CPZ A1 operates on Sundays and bank holidays 11:00-17:00 and within this area Resident Permit Holder bays operate 08:30-midnight every day.

Environment quality

The quality of buildings within Richmond town centre is predominantly good and shopfronts are well kept. The core of the town centre is within Central Richmond conservation area (CA17), but the centre also extends into four other conservation areas – Richmond Hill (CA5), Richmond Riverside (CA4), Richmond Green (CA3) and Old Deer Park (CA57). There are many listed buildings throughout the centre.

At the time of the site visit, several large vacant buildings were being renovated, showing investment in the area. 75-81 George Street (former House of Fraser unit) is being redeveloped into a mixed use development comprising retail, employment and community use, securing planning permission and listed building consent in January 2021 (19/2393/LBC/19/2392/FUL). Richmond Station is a key gateway into Richmond town centre. The station is allocated in the Local Plan (SA19) for comprehensive redevelopment including

improved transport interchange, appropriate mix of main centre uses and provision of housing (including affordable). The station is a key development opportunity in the centre.

The centre is concentrated along the A307 with moderate to heavy traffic; however, one-way routes ease traffic flows throughout. Frequent pedestrian crossings are found throughout the centre. Pedestrian flows were heaviest around the KSF.

Richmond Green is to the west of the centre boundary providing accessible green space. Richmond riverside with its towpath provides a significant amount of high quality open space for recreation. There is good provision of vegetation and tree planting throughout. Flowerpots outside the railway station are visually appealing for visitors arriving at the centre. Pedestrianised side streets with independent shops/cafes providing outside seating (e.g. Golden Court).

Overall, during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging and limited amounts of litter at the time of **the researcher's** visit to the centre. There was no evidence of graffiti and vandalism. A small cluster of vacant units was found near the northern centre boundary.

Reported crime

Recorded crime within the South Richmond Metropolitan Police neighbourhood was 2,057 from May 2021-April 2022, higher than the average for the five town centres in the Borough (1,066 crimes). This may be because the station is a crime hotspot, especially in the evenings and at night. Antisocial behaviour represented 30% of total crimes, followed by vehicle crime (24%) and violence and sexual offences (22%).

*Summary of Richmond town centre's **Strengths and Weaknesses***

Strengths

- Highest number of comparison shops of all centres in the Borough, with a good range of multiple retailers, selling a range of higher and lower order goods.
- Excellent range of services.
- Choice of restaurants/café's higher than both the Borough and UK average
- Vacancy rate lower than the national average.
- Highest proportion of study area population use shops and service in Richmond town centre.
- **Richmond's catchment area extends across the Borough and beyond.**
- Green/open space nearby.
- The London Plan suggests high potential for commercial growth.
- A reasonable night-time economy, which is classified as NT2 in the London Plan (regional/sub-regional significance).
- Excellent public transport links i.e. underground, bus and over-ground rail and good car parking provision when compared with other centres.
- Accessible green space.

Weaknesses

- Limited proportion of hot food takeaways.
- Higher crime rate than the Borough average
- Highest prime pitch rental levels of the five town centres, according to VOA.
- Selection of independent shops was an issue mentioned by several household survey respondents.

East Sheen District Centre

East Sheen is in the east of the Borough and is identified as a ‘District Centre’ in the London Plan. The centre is focused along two roads – Upper Richmond Road West (A205) and Sheen Lane (just north of Mortlake Railway Station). The centre is **surrounded predominantly by residential development. The centre’s main role is providing convenience goods and services.** Sheen Lane is within Sheen Lane, Mortlake Conservation Area (CA70).

The KSF is concentrated along the central sections of Upper Richmond Road West, around the junction with Sheen Lane. The SSF extends east and west along Upper Richmond Road West and along parts of Sheen Lane.

East Sheen’s key roles include:

- convenience shopping – large Waitrose suitable for main and bulk food shopping and Tesco Express and Amazon Fresh provide top up shopping. The stores are supported by independent convenience stores (x10), bakery/café (x3), cake shop (x2) an off license, a confectioner and a delicatessen;
- comparison shopping – reasonable proportion of comparison retailers but the majority are independent retailers, with a small number of multiple retailing shops;
- services – good selection for its size including excellent representation of restaurants/cafes. Good representation of fast food takeaways, estate agents/valuers and launderettes/dry cleaners;
- entertainment and evening economy – a good choice of restaurants and takeaways but a limited choice of pubs/bars; and
- community facilities – including a library, Sheen Lane Centre (civic centre), a health centre/surgery, an education centre, three dentists, three yoga studios and two gymnasiums.

Mix of use and occupier representation

East Sheen has 275 retail and service units. The diversity of uses within the centre is set out in Table ES1, compared with the Goad Plan national average and the Borough average.

Table ES1 - Mix of shop and service uses – East Sheen

Type	Number units	% units	LBRuT average	UK average
Comparison goods retail	92	33.5	27.7	29.0
Convenience goods retail	24	8.7	11.7	9.7
Financial/professional services	26	9.5	8.1	9.0
Restaurants/cafés	40	14.5	15.3	10.0
Pubs/bars	2	0.7	2.7	4.9
Hot food takeaways	11	4.0	3.8	6.2
Other non-retail services	47	17.1	20.6	16.5
Vacant	33	12.0	10.1	14.7
Total	275	100.0	100.0	100.0

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

The centre’s mix of units is broadly in line with the national average although it has a higher proportion of comparison units and financial/professional services but a lower proportion of pubs/bars. There were 33

vacant units within East Sheen at the time of the LBRuT’s survey, a vacancy rate 12% which is slightly higher than the Borough average but lower than the national average. The vacancy rate is slightly higher than in the 2014 Retail Study (9%) where there were only 19 vacant units.

East Sheen has a good selection of comparison shops (92), the second highest of the five District Centres. Table ES2 provides a breakdown of comparison units by category.

Table ES2 - Mix of comparison goods uses – East Sheen

Type	Number units	% units	LBRuT average	UK average
Clothing and footwear	10	10.9	14.4	21.5
Furniture, carpets and textiles	22	23.9	16.8	7.6
Books, arts, cards and stationers	4	4.3	5.7	7.7
Electrical, music and photography	7	7.6	7.6	9.1
DIY, hardware and homeware	7	7.6	6.0	6.6
China, glass and gifts	5	5.4	4.8	5.3
Cars, motorcycles and accessories	2	2.2	1.1	1.3
Chemists, drug stores and opticians	7	7.6	14.7	11.7
Variety, department and catalogue	0	0.0	0.3	1.8
Florists, nurserymen and seedsmen	5	5.4	4.4	2.2
Toys, hobby, cycle and sports	5	5.4	3.9	5.3
Jewellers	1	1.1	2.7	5.0
Charity and second-hand shops	7	7.6	7.4	9.9
Other comparison good retailers	10	10.9	10.2	5.0
Total	92	100.0	100.0	100.0

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

Only one Goad category is not represented in the centre, i.e. variety, department and catalogue. Two categories only have one or two units represented i.e. jewellers and cars, motorcycles and accessories. The centre has a reasonable selection in most other categories. East Sheen has a high proportion of furniture, carpets and textiles shops when compared with the national and Borough average for a centre of its size.

The number of multiple comparison retailers (excluding charity shops) is very limited. Most comparison shops are small independent traders. The multiple comparison retailers include:

Table ES.7.2 East Sheen comparison multiples

Boots (chemist)	Carpentright	Harvey Jones	Superdrug
Tool Station			

Source: LBRuT land use survey 2021

East Sheen has a good selection of service uses for its size (126 in total) with only one category not represented, as shown in Table ES3. Good representation of restaurants/cafes, estate agents/valuers and laundrettes/dry cleaners. However, three categories only have one or two units i.e. betting shops/casinos/amusement; banks/other financial institutions and pubs/bars.

With regards to food/beverage uses, there is a low proportion of pubs/bars but a reasonable proportion of fast food takeaways. East Sheen has an excellent representation of restaurants/cafes (19 restaurants and 21 cafes) which is significantly higher than both the national and Borough average. There appears to be potential to improve facilities serving the night-time economy.

Table ES3 - Mix of service uses – East Sheen

Type	Number Units	% units	LBRuT average	UK average
Restaurants/cafés	40	41.7	35.4	23.8
Fast food/takeaways	11	11.5	8.7	14.7
Pubs/bars	2	2.1	6.2	11.7
Banks/other financial services	1	1.0	3.5	8.6
Betting shops/casinos/amusement	1	1.0	1.6	3.8
Estate agents/valuers	11	11.5	9.6	7.9
Travel agents	0	0.0	0.7	1.7
Hairdressers/beauty parlours	24	25.0	28.1	26.1
Launderettes/dry cleaners	6	6.3	6.2	1.7
Sub-total	96	100.0%	100.0	100.0
Other	30			
Total	126			

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

Commercial rents (VOA 2017)

According to the VOA, Zone A retail rents vary throughout the centre. Zone A retail rents are highest in the central part of the centre reaching £685 per sqm at the junction of Upper Richmond Road West and Sheen Lane. Moving east along Upper Richmond Road West rents range from £430 to £265 per sqm. On the west side of Upper Richmond Road West, rents range from £486 to £367. Along Sheen Lane, Zone A rents range from £315 (at the north near the railway station) to £500 at the south. Overall, the centre provides a good mix of affordable to medium cost premises.

Catchment area

East Sheen's local catchment area includes the wards of Mortlake and Barnes Common, Barnes and East Sheen. The household survey results indicate 25% of respondents across the study area had used shops and services in East Sheen in the last year, which is the second lowest of the five town centres in the Borough. However, a significantly high proportion (78%) of people living in the local area (Zone 7) had visited the centre. Only 1% of survey respondents indicated that they do most of their non-food shopping in East Sheen town centre, significantly below Richmond but the same as Whitton.

The retail capacity analysis suggests East Sheen attracts most trade (75%) from Zone 7. The centre has a relatively localised catchment area when compared with Richmond and Twickenham.

London Plan indicators

The London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. **East Sheen's** designations are:

- Network classification: District centre
- Night-time classification: None
- Commercial growth potential: Medium (moderate levels of retail, leisure or office demand)
- Residential growth potential: Incremental
- Office guidelines: C
- Strategic area for regeneration: No

Customer views

As part of the household survey, respondents were asked if they had used shops and services in East Sheen in the last year. Of those who had used shops/services in the centre, respondents were asked what they like about East Sheen Town centre and what would encourage them to visit more often. Circa 38% liked the centre because it is close to home. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: good range of independent shops (16%); good range of non-food shops (11%); good range of supermarkets (8%); you can get everything you need there (7%); good range of other services (6%); attractive environment/nice place (5%) and parking – easy to find a space (5%).
- *improvements*: less traffic congestion (8%); parking – more spaces (8%); better/more independent shops (5%); fewer empty shops (5%) and better/more clothing shops (5%).

The results suggest that respondents felt the choice of shops in East Sheen town centre is good. Responses regarding parking provision were mixed. However, the centre rates least favourably in terms of traffic congestion.

Accessibility

Public Transport Accessibility Levels (PTAL) throughout the centre are mostly Level 3 but some areas drop to level 2 (Source: TFL WebCAT tool).

The household survey results suggest East Sheen attracts customers by a variety of means of transport. Mode of travel for food shopping within the local area (Zone 7) is in line with the study area average with the highest proportions doing their main food shopping by car (57%) or walking (27%). Public transport is much lower – travel by bus is 5% and train is 1%. For non-food shopping, East Sheen attracts a better mix – walking (31%), car (30%), bus (11%) and train (9%). The survey results also indicated higher levels of dissatisfaction with car parking provision than satisfaction i.e. 8% compared with 5%.

East Sheen has reasonable public transport accessibility. Mortlake Rail Station is in the north of the town centre, accessed primarily from Sheen Road. The station provides services into central London via the London Waterloo loop (via Kingston and Hounslow) and west out of London to Windsor and Eton Riverside.

East Sheen town centre is served by four bus routes providing good access to other centres within the Borough and other parts of London including Barnes, Clapham Junction, Tooting. Bus routes which serve the centre include 33 (which also operates a night service), 337, 493 and 969.

There are three car parks within the town centre boundary – Sheen Lane, Waitrose (for customers only) and Mortlake Station. At Sheen Lane car park, Richmond Residents, with RichmondCard or have registered with RingGo can get free parking for stays up to 30 minutes or pay the reduced tariffs for longer stays. On-street parking is available. CPZ ES operates in part of the town centre, Monday-Friday, 10:00-12:00.

Environment quality

The quality of buildings within East Sheen town centre is relatively good. There were a few vacant units but no clusters. Buildings were well kept and varied throughout i.e. some units have mock-Tudor tops. Mortlake Conservation Area (CA70) covers the north of the centre and there are a few listed buildings.

East Sheen town centre is largely dominated by traffic as the retail units are distributed on either side Upper Richmond Road West (A205) and Sheen Road. Traffic flows are medium to heavy along Upper Richmond Road West, which becomes congested at times. Movement in and around the centre is problematic during peak times due to the largely linear, non-pedestrianised structure of the centre which experiences high volumes of traffic in the south and KSF areas. More frequent pedestrian crossings and wider pavements along Upper Richmond Road West would assist pedestrian flows which are heaviest along the KSF.

Mortlake Green, providing a children's playground, playing fields and seating areas, is located north of the railway station although this is just outside of the centre boundary. It is easily accessed by visitors to the centre. The centre also provides good community facilities including a health centre, library, civic centre and a gym.

Overall, during the daytime the centre felt safe, there was little evidence of litter within the centre and no evidence of graffiti, vandalism and antisocial behaviour or begging **at the time of the researcher's visit**. There are trees and flowerpots throughout the centre, cycle parking provision and e-scooters available to hire.

Reported crime

Recorded crime within the East Sheen Police neighbourhood was 625 from May 2021-April 2022, lower than the average for the five town centres in the Borough (1,066 crimes). Violence and sexual offences represented 15% of total crimes, followed by vehicle crime (14%) and other theft (9%).

*Summary of **East Sheen's** Strengths and Weaknesses*

Strengths

- Good provision of convenience retailing within the centre, with Waitrose, Tesco Express and Amazon Fresh.
- Good selection of services for its size.
- Excellent representation of restaurants/cafes.
- Vacancy rate lower than national average.
- Provides good mix of affordable and medium cost premises.
- Lower crime rate than borough average.
- Loyal customer catchment.

Weaknesses

- Limited choice of pubs/bars.
- Potential to improve facilities serving night-time economy.
- Survey results indicated higher levels of dissatisfaction with car parking provision than satisfaction i.e. 8% compared with 5%.
- Traffic congestion is an issue throughout the centre.
- Linear structure of centre with high volumes of traffic flows is a barrier to pedestrian flows/movement.

Teddington District Centre

Teddington is in the southwest of the Borough and is identified as a ‘District Centre’ in the London Plan, providing convenience goods and services to the local community. The centre is relatively linear with the key and secondary frontages concentrated along High Street and Broad Street, separated by two central roundabouts and a bridge over the railway line. Main roads within the centre boundary include Broad Street, High Street and (parts of) Waldegrave Road.

The main KSF is concentrated along Broad Street and the High Street. The SSF is limited to the southern side of the High Street, adjacent to the KSF, the Causeway, Church Road and the western periphery of Broad Street.

Teddington district centre’s key roles include:

- convenience shopping – **Tesco and M&S Simply Food suitable for bulk food shopping. Sainsbury’s Local** and Budgens for top-up shopping. These stores are supported by three bakers, four independent convenience stores, two grocers, an off licence, a health shop and a florist.
- comparison shopping – mainly small independent retailers and charity shops, limited numbers of multiple retailing shops selling mostly lower order comparison goods;
- services – reasonable range of services with a significantly high proportion of restaurants/cafes and estate agents/valuers.
- entertainment and evening economy – a good choice of restaurants.
- community facilities – including three dentists, a gymnasium, a **doctor’s** surgery, Teddington Memorial Hospital (with walk in centre), two physiotherapists, a veterinary practice and a library. Additionally, the Landmark Arts Centre provides a community and exhibition space on the High Street.

Mix of use and occupier representation

Teddington has 178 retail and service units. The diversity of uses within the centre is set out in Table TD1, compared with the Goad Plan national average and Borough average.

Table TD1 - Mix of shop and service uses – Teddington

Type	Number units	% units	LBRuT average	UK average
Comparison goods retail	52	29.2	27.7	29.0
Convenience goods retail	21	11.8	11.7	9.7
Financial/professional services	16	9.0	8.1	9.0
Restaurants/cafés	31	17.4	15.3	10.0
Pubs/bars	6	3.4	2.7	4.9
Hot food takeaways	5	2.8	3.8	6.2
Other non-retail services	33	18.5	20.6	16.5
Vacant	14	7.9	10.1	14.7
Total	178	100.0	100.0	100.0

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

The mix of uses in Teddington largely reflects the national average; however, there is higher proportion of restaurants/cafes and convenience retailers. The centre has a lower proportion of hot food takeaways

than the national and Borough average. There were 14 vacant units within Teddington town centre at the time of LBRuT's 2021 land use survey, equating to a vacancy rate of 7.9%. A notable vacant unit was Johnson's shoes, which is not unique to the centre but nationwide, including Twickenham town centre. While this is slightly higher than the 2014 study (4.4%), it is below both the national and Borough average, reflecting a vital and viable centre.

Teddington has a fair selection of comparison shops (56 units), the second lowest of the five centres, reflecting its role as primarily a service centre. There are three Goad categories not represented i.e. cars, motorcycles and accessories; variety, department and catalogue and toys, hobby, cycle and sports. The choice in some categories is also limited. Table TD2 provides a breakdown of comparison units by category.

Table TD2 - Mix of comparison goods uses – Teddington

Type	Number units	% units	LBRuT average	UK average
Clothing and footwear	10	17.9	14.4	21.5
Furniture, carpets and textiles	8	14.3	16.8	7.6
Books, arts, cards and stationers	3	5.4	5.7	7.7
Electrical, music and photography	2	3.6	7.6	9.1
DIY, hardware and homeware	2	3.6	6.0	6.6
China, glass and gifts	5	8.9	4.8	5.3
Cars, motorcycles and accessories	0	0.0	1.1	1.3
Chemists, drug stores and opticians	7	12.5	14.7	11.7
Variety, department and catalogue	0	0.0	0.3	1.8
Florists, nurserymen and seedsmen	4	7.1	4.4	2.2
Toys, hobby, cycle and sports	0	0.0	3.9	5.3
Jewellers	2	3.6	2.7	5.0
Charity and second-hand shops	8	14.3	7.4	9.9
Other comparison good retailers	5	8.9	10.2	5.0
Total	56	100.0	100.0	100.0

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

Compared with the national average, the proportion of units in several categories is lower. These categories include clothing and footwear; books, arts, cards and stationers; electrical, music and photography; DIY, hardware and homeware; jewellers and other comparison goods retailers. Teddington has a high proportion of china, glass and gifts; florists, nurserymen and seedsmen and charity shops.

The number of multiple comparison retailers (excluding charity shops) is relatively limited. Most comparison units are operated by small independent traders. The multiple comparison retailers include:

Table TD3 – Teddington's comparison multiples

Boots Chemist	Boots Opticians	Holland and Barrett	Jigsaw
Sports Direct	Superdrug	WHSmith	Waterstones

Source: LBRuT land use survey 2021

Teddington has a good range of services (91 in total), with only one category (travel agents) not represented, as shown in Table TD4. This is a lower number than Richmond, Twickenham and East Sheen but is higher than Whitton.

Table TD4 - Mix of service uses – Teddington

Type	Number Units	% units	LBRuT average	UK average
Restaurants/cafés	31	38.8	35.4	23.8
Fast food/takeaways	5	6.3	8.7	14.7
Pubs/bars	6	7.5	6.2	11.7
Banks/other financial services	1	1.3	3.5	8.6
Betting shops/casinos/amusement	3	3.8	1.6	3.8
Estate agents/valuers	9	11.3	9.6	7.9
Travel agents	0	0.0	0.7	1.7
Hairdressers/beauty parlours	22	27.5	28.1	26.1
Launderettes/dry cleaners	3	3.8	6.2	1.7
Sub-total	80	100.0	100.0	100.0
Other	11			
Total	91			

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

When compared with the national average, there is a significantly higher proportion of restaurants/cafés and estate agents/valuers but a lower proportion of fast food/takeaways; pubs/bars and banks/other financial institutions. There appears to be potential to improve facilities serving the night-time economy.

There is a mixture of independent and multiple food/beverage outlets. Multiples include Pizza Express, Cote Brasserie, Nando's, Costa and Starbucks.

Commercial rents (VOA 2017)

According to the VOA, Zone A retail rents vary throughout the centre. Zone A rents range from £700 to £620 per sqm in the prime pitch in the central section of the centre around Broad Street. Along High Street, Zone A rents range from £620 to £360 per sqm on the outer edges. On the western edge of the centre, at the end of Broad Street, Zone A rents drop to £360 per sqm. Zone A rents are relatively high along Station Road (£525 per sqm) and the Causeway (£440 per sqm).

Catchment area

Teddington's local catchment area includes the wards of Fulwell and Hampton Hill, Teddington and Hampton Wick and South Teddington.

The household survey results indicate 42% of respondents across the study area had used shops and services in Teddington in the last year. This figure is lower than Richmond and Twickenham town centres but higher than East Sheen and Whitton. 90% of people living in the local area (Zone 4) had visited the centre which is the highest of the five town centres. Only 3% of respondents indicated that they do most of their non-food shopping in Teddington, significantly below Richmond but the same as Twickenham. The retail capacity analysis suggests Teddington town centre attracts about 52% of its trade from the local Zone 4 but attracts

reasonably high levels of trade from the zones in the west and central parts of the Borough. The centre has a relatively wide catchment area when compared with Whitton and East Sheen.

London Plan indicators

The London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. **Teddington's** designations are:

- Network classification: District centre
- Night-time classification: NT3 (local significance)
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Incremental
- Office guidelines: C
- Strategic area for regeneration: No

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Teddington in the last year. Of those who had used shops/services in Teddington, respondents were asked what they like Teddington town centre and what would encourage them to visit more often. Approximately 31% of like Teddington because it is considered to have a good range of independent shops or because it is close to home. 58% of respondents did not mention anything they would improve about the centre. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: good cafes/restaurants (20%); attractive environment/nice place (15%); you can get everything you need there (9%); good range of non-food shops (9%) and because it is considered traditional/quaint (5%).
- *improvements*: better/more clothing shops (7%) and more car parking spaces (6%).

The results suggest that people's views on Teddington were mostly positive as 58% of respondents did not mention anything they disliked about the centre and there were only two factors that respondents felt could be improved. Teddington rates most favourably in terms of its range of independent shops.

Accessibility

Public Transport Accessibility Levels (PTAL) throughout the centre is Level 3 (Source: TfL WebCAT).

The household survey results suggest Teddington attracts customers by a variety of means of transport. Mode of travel for food shopping within the local area (Zone 4) is relatively in line with the study area average with the highest proportions doing their main food shopping by car (51%) or walking (24%). For non-food shopping, 34% walk, 32% travel by car and 18% by bus.

Teddington has reasonable public transport accessibility. Teddington Rail Station is located on the southern boundary of the centre. The station has regular trains on the London Waterloo loop (via Kingston) and to Shepperton. Teddington town centre is also served by several bus routes including numbers 33 (24 hours), 281, 285, 481, 681, R68 and X26.

Car parks include Teddington Station, Cedar Road, North Lane East, North Lane West and Teddington Pools. Parking is also available to paying M&S customers. Electrical Vehicle Charing (EVC) points are available. Richmond Residents, with RichmondCard or have registered with RingGo can get free parking for stays up to 30 minutes or pay the reduced tariffs for longer stays. On-street parking is also available. Key

Controlled Parking Zones are M5 (Broad Street) and M4 (High Street), operating 9am-5pm Monday-Saturday providing two hours maximum stay.

Environment quality

The quality of buildings within Teddington is mainly good and shopfronts are well kept. The town centre is within two conservation areas, Broad Street (CA:84) and Teddington High Street (CA:37). There are several listed buildings within the centre, including Teddington Library and Teddington War Memorial. Teddington town centre has two outstanding redevelopment opportunities allocated in the Local Plan 2018 – Telephone Exchange (SA5) and Teddington Delivery Office (SA6). Both allocations are for commercial/retail at ground floor level, employment and housing.

Traffic flows through the centre are moderate. Pedestrian flows are heaviest along Broad Street. Pavements were in good condition but narrow in places along Broad Street. This was exacerbated by high levels of on-street parking further restricting pedestrian flows.

Small areas of green space/vegetation and soft landscaping can be found in the centre, notably near Teddington Methodist Church and Jubilee Gardens and good levels of street furniture are provided for visitors to the centre. Good provision of street trees and hanging baskets along High Street. Teddington Lock and Thames Tow Path with access to Ham Lands is circa. 190 metres west of the town centre boundary. Outside of the centre boundary, on Vicarage Road, is Teddington Pool and Fitness Centre and Teddington Lawn Tennis Club.

Overall, during the daytime the centre felt safe, there was little evidence of litter within the centre and no evidence of graffiti, vandalism and antisocial behaviour or begging **at the time of the researcher's visit**. There are no clusters of vacant buildings. Street furniture is provided throughout.

Reported crime

Recorded crime within the Teddington Metropolitan Police neighbourhood was 710 from May 2021-April 2022, lower than the average for the five town centres in the Borough (1,066 crimes). Antisocial behaviour represented 9% of total crimes, followed by bicycle theft (7%) and public order (6%).

Summary of Teddington's Strengths and Weaknesses

Strengths

- Vacancy rate lower than national average.
- Rated highly on environmental quality in survey responses.
- Good selection of restaurants/cafes.
- Good range of services, with only one Goad category not represented.
- Lower crime rate than average of main five centres

Weaknesses

- Limited numbers of multiple retailing shops selling mostly lower order comparison goods.
- There appears to be potential to improve facilities serving the night-time economy.
- Limited number of clothes shops in general.
- Car parking spaces were an issue raised in survey responses.

Twickenham District Centre

Twickenham town centre is located centrally in **the Borough and is identified as a 'District Centre' in the London Plan**. It is the second largest shopping and commercial centre within LBRuT, the largest of the four district centres. The centre is focused along 5 key roads – London Road, King Street/Heath Road, York Street/Richmond Road and Church Street (pedestrianised). **The centre's main purpose is to provide convenience goods and services to local communities.**

Twickenham town centre has a distinctive heritage and is rich in historic assets. Queens Road Twickenham (CA47) and Twickenham Riverside (CA8) conservation areas cover the central and western parts of the centre, along parts of London Road, King Street, York Street, Water Lane and Wharf Lane. Several listed buildings are clustered around King Street and Church Street including York House and Gardens. The centre boundary extends down to the riverside. Just outside the centre is the Rugby Football Union (RFU) Stadium.

The main KSF is concentrated along King Street, Church Street and parts of London Road, York Street and Heath Road. The SSF is located along Heath Road and the western side of London Road. The retail frontages are relatively compact with units along these main roads all located close to the core of the KSF on King Street. There are additional shops and services to the west of Richmond Road, but these are not included within the designated centre boundary.

Twickenham district centre's key roles include:

- convenience shopping – Waitrose, Iceland, Tesco Express, Coop and Marks & Spencer Simply Food provide the main convenience, which could serve both main food and top up shopping but most likely to include the latter with the exception of Waitrose. Supported by nine independent convenience stores, three sandwich shops, two off licences, three delicatessens, four bakery/cafés, two butchers, a greengrocer, fishmonger and confectioner.
- comparison shopping – small independent specialist retailers, with a limited number of multiple retailers;
- services – a good number of restaurant/cafes and a reasonable number of fast food/takeaways and pubs/bars.
- entertainment and evening economy – a good number of restaurants/cafes and a reasonable number of fast food/takeaways and pubs/bars. Only four betting shops/casinos/amusement units.
- community facilities – including four dentists, two gymnasiums, three physiotherapists, a day nursery/pre-school, health centre, job centre, museum, police station, veterinary practice, yoga studio, Twickenham Library and the Exchange Theatre.

Mix of use and occupier representation

Twickenham has 276 retail and service units. The diversity of uses within the centre is set out in Table TW1, compared with the Goad Plan national average and Borough average.

Twickenham centre's mix of units is broadly in line with the national average although it has a lower proportion of comparison units. This may be because the centre contains several large comparison units formed through amalgamation. This is in line with the 2014 Retail Survey and suggests Twickenham continues to play a service and convenience role in the retail hierarchy.

Table TW2 shows a breakdown of comparison retail units by category.

Table TW1 - Mix of shop and service uses – Twickenham

Type	Number units	% units	LBRuT average	UK average
Comparison goods retail	70	25.4	27.7	29.0
Convenience goods retail	33	12.0	11.7	9.7
Financial/professional services	22	8.0	8.1	9.0
Restaurants/cafés	48	17.4	15.3	10.0
Pubs/bars	10	3.6	2.7	4.9
Hot food takeaways	13	4.7	3.8	6.2
Other non-retail services	60	21.7	20.6	16.5
Vacant	20	7.2	10.1	14.7
Total	276	100.0	100.0	100.0

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

The proportion of restaurants/cafes is significantly higher than the national average. While the proportion of takeaways and pubs/bars is lower than the national average, it is higher than the Borough average. This shows **the centre's role as a leisure destination**, especially on match days with the nearby RFU Stadium. The centre had 20 vacant units at the time of LBRuT's Land Use Survey 2021 (a vacancy rate of 7.2%) which is notably lower than the national average and the 2014 Retail Study (with 28 vacant units). This indicates Twickenham is a strong/healthy centre which should withstand changes including the Covid19 pandemic.

Table TW2 - Mix of comparison goods uses – Twickenham

Type	Number units	% units	LBRuT average	UK average
Clothing and footwear	6	8.6	14.4	21.5
Furniture, carpets and textiles	14	20.0	16.8	7.6
Books, arts, cards and stationers	2	2.9	5.7	7.7
Electrical, music and photography	6	8.6	7.6	9.1
DIY, hardware and homeware	7	10.0	6.0	6.6
China, glass and gifts	5	7.1	4.8	5.3
Cars, motorcycles and accessories	1	1.4	1.1	1.3
Chemists, drug stores and opticians	11	15.7	14.7	11.7
Variety, department and catalogue	0	0.0	0.3	1.8
Florists, nurserymen and seedsmen	3	4.3	4.4	2.2
Toys, hobby, cycle and sports	3	4.3	3.9	5.3
Jewellers	0	0.0	2.7	5.0
Charity and second-hand shops	5	7.1	7.4	9.9
Other comparison good retailers	7	10.0	10.2	5.0
Total	70	100.0	100.0	100.0

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

There are two categories which are not represented i.e. variety, department and catalogue; jewellers. Twickenham has a significantly higher proportion of furniture, carpets and textiles and DIY, hardware and homeware stores when compared with the national and Borough average. Conversely, the proportion of clothing and footwear and books, arts, cards and stationers stores is below the national and Borough average. The town centre provides relatively good choice within 10 of the comparison categories.

Given the size of Twickenham town centre, the number of multiple comparison retailers (excluding charity shops) is relatively limited, as listed in table TW3. This reflects **the centre’s role in the retail hierarchy**.

Table TW3 – Twickenham comparison multiples

Boots Opticians	Boots	Day Lewis	EE
Holland and Barrett	Poundland	Screwfix	Specsavers
Superdrug	The Works	Waterstones	WHSmith’s

Source: Twickenham land use survey 2021

Twickenham town centre has a good range of non-retail service uses (153 in total), with all categories present, as shown in table TW4. All but one of the **categories are well represented, reflecting the centre’s size and service role in the retail hierarchy**.

When compared to the national average, the centre has a higher proportion of restaurants/cafes and estate agents/valuers, but a lower proportion of hairdressers/beauty parlours; banks/other financial services and Travel agents.

As noted above, the proportion of restaurants/cafes in Twickenham town centre is significantly higher than the national average, by over 10%. The centre has a high proportion of over 10% higher than the national average. Multiple food/beverage outlets **are limited but there is a Greggs, Gail’s Bakery and Domino’s Pizza**. Food and beverage uses include 26 restaurants, 22 cafes/coffee shops, 26 takeaways and 10 pubs, which provide a mix of daytime and night-time facilities serving rugby fans, Council and other office workers.

Table TW4 - Mix of service uses – Twickenham

Type	Number Units	% units	LBRuT average	UK average
Restaurants/cafés	48	36.4	35.4	23.8
Fast food/takeaways	13	9.8	8.7	14.7
Pubs/bars	10	7.6	6.2	11.7
Banks/other financial services	7	5.3	3.5	8.6
Betting shops/casinos/amusement	4	3.0	1.6	3.8
Estate agents/valuers	14	10.6	9.6	7.9
Travel agents	1	0.8	0.7	1.7
Hairdressers/beauty parlours	30	22.7	28.1	26.1
Launderettes/dry cleaners	5	3.8	6.2	1.7
Sub-total	132	100.0	100.0	100.0
Other	21			
Total	153			

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

Commercial rents (VOA 2017)

According to the VOA, Zone A retail rents vary significantly throughout the centre. Prime pitch levels are along King Street reach £850 per sqm. The centre has the second highest prime pitch rental levels of the five centres in the Borough. Zone A retail rents on York Street/Richmond Road are between £500 and £400 per sqm. Along London Road, Zone A rents range from £475 to £500. Zone A rents fall from £450 to £365 on Church Street in the east of the centre. Similarly, on the western edge of the centre, along Heath Road, Zone A rents range from £650 to £350.

Catchment area

Twickenham's local catchment area includes the wards of St Margaret's and North Twickenham, Twickenham Riverside and South Twickenham (Zone 2).

The household survey results indicate 53% of respondents across the study area had used shops and services in Twickenham in the last year, the second highest of the five town centres in the Borough. Circa 87% living in the local area (Zone 2) had visited the centre. Only 3% of respondents indicated that they do most of their non-food shopping in Twickenham, which is significantly lower than Richmond but the same as Teddington.

The retail capacity analysis suggests Twickenham town centre attracts only about 40% of its trade from the local Zone 2 but attracts reasonably high levels of trade from the central and western zones in the Borough. The centre has a relatively wide catchment area when compared with Whitton and East Sheen, but a smaller catchment than Richmond. This may be due to an inflow from workers; however, this is less relevant following the pandemic and the move towards hybrid working.

London Plan indicators

The London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. **Twickenham's** designations are:

- Network classification: District centre
- Night-time classification: NT3 (Local Significance)
- Commercial growth potential: Medium (moderate levels of retail, leisure or office demand)
- Residential growth potential: Incremental
- Office guidelines: B
- Strategic area for regeneration: No

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Twickenham in the last year. Of those who had used shops/services in Twickenham, respondents were asked what they like about Twickenham town centre and what would encourage them to visit more often. 28% of respondents like Twickenham because it is close to home. The other main factors mentioned (5% of respondents or more) were:

- *factors liked:* good cafes/restaurants (9%); good range of independent shops (9%); attractive environment/nice place (8%); good range of affordable shops (6%); good range of non-food shops (6%); **good pubs/bars (5%); good range of 'high street' retailers (5%)** and (5%) considered you can get everything you need there.

- *improvements*: more car parking spaces (11%); better/more clothing shops (10%); better/more independent shops (9%); better/more non-**food shops generally (8%); better/more 'high street' chain** retailers and nicer environment (5%).

The results suggest there are mixed views regarding the choice of shops in Twickenham town centre. The centre also rates least favourably in terms of the number of car parking spaces available.

Accessibility

Public Transport Accessibility Levels (PTAL) throughout the centre range from Level 3 to 5 (Source: TfL WebCAT). There is a small section along King Street which is classed as level 6a.

The household surveys suggest Twickenham attracts customers by a variety of means of transport. Mode of travel for food shopping within the local area (Zone 2) is broadly in line with the study area with the highest proportions doing their main food shopping by car (48%) or walking (39%). 4% travel by bus and 2% cycle. For non-food shopping, Twickenham attracts a good mix of car, bus, train and walking customers, which suggests high levels of accessibility.

Twickenham town centre has good public transport accessibility. Twickenham railway station is on the northern boundary of the town centre and has benefitted from recent major redevelopment. The station has regular trains to Windsor and Eton Riverside, Reading and the London Waterloo loop (via Kingston and Hounslow).

The centre is served by several bus routes providing good access to other centres within the Borough and other parts of London including Hammersmith, Chiswick, Tolworth, Hampton Court and Barnes. Bus routes include 33 (24 hours), 261, 267, 281, 290, 490, 681, H22, R68, R70. The N22 provides a night service between Oxford Circus and Fulwell.

Twickenham town centre has four car parks – Arragon Road multi-storey, Church Lane, Holly Road and York House. Richmond Residents, with RichmondCard or have registered with RingGo can get free parking for stays up to 30 minutes or pay the reduced tariffs for longer stays. There is also on-street parking. CPZ D (Central Twickenham) operates in the centre, Monday-Saturday, 08:30-18:30.

Environment quality

The quality of buildings within Twickenham town centre is largely good. Shopfronts are well kept, and the town centre is rich in historic assets including several listed buildings. The architectural continuity of many of the buildings at upper floors within the central and western parts of the centre (in the two conservation areas) is an attractive feature of the centre and enhances the visual amenity of the town.

The town centre is largely dominated by traffic, with heavy to medium traffic flows concentrated along London Road, King Street and Heath Road. There has been significant investment in the public realm in Twickenham in the last decade, particularly in terms of improving pedestrian movement on Heath Road. Church Street and side roads leading to the embankment provide a shopping experience with less traffic, pedestrianised areas featuring cafes with outside seating areas and public green space with planting and seating. Pedestrian flows are heaviest along London Road, King Street and Heath Road but wider paving in these areas assisted. Some pedestrian crossings could be improved where King Street forks into the London Road and York Street.

The town centre provides good access to public green space including Diamond Jubilee Gardens, Holly Road Garden of Rest, York House Gardens (partially inside/outside the boundary). East of the centre boundary is

Marble Hill Park. Heath Roads contains areas of tree planting, street furniture and flower baskets which add to the aesthetics of the centre.

At the time of the researcher's visit, there was limited evidence of graffiti or vandalism within the centre. The key and secondary shopping areas contained small amounts of litter, mainly chewing gum and cigarette butts. Overall, the centre felt safe during the daytime and there was no evidence of antisocial behaviour or begging. There was a slight cluster of vacant units along King Street, within the KSF.

Reported crime

Twickenham town centre falls within both Twickenham Riverside Metropolitan Police neighbourhood and South Twickenham. Most of the centre falls within Twickenham Riverside neighbourhood and its statistics are included to allow comparison with other centres within LBRuT. Recorded crime within Twickenham Riverside neighbourhood was 1,209 from May 2021-April 2022, higher than the average for the five town centres in the Borough (1,066 crimes). Violence and sexual offences represented 26% of all crimes, followed by anti-social behaviour (23%) and drugs (8%).

Summary of Twickenham's Strengths and Weaknesses

Strengths

- Good food supermarkets (Waitrose, Iceland Tesco Express, the Coop and Marks & Spencer Simply Food).
- Lowest vacancy rate of the five town centres
- Church Street and side roads leading to the embankment provide a quieter shopping experience with less traffic, outside seating and public green space/planting.
- A good range of non-retail service facilities with all but one of the categories well represented.
- The provision of restaurants/cafes is significantly higher than the national average.

Weaknesses

- Limited number and selection of comparison retailers and few multiple comparison retailers for its size.
- The busy A305 dissects the town centre.
- Crime rate higher than Borough average.
- Number of car parking spaces raised as an issue in a high proportion of survey responses, although there is significant parking provision in the centre.

Whitton District Centre

Whitton is in the northwest of the **Borough and is identified as a ‘District Centre’ in the London Plan**. It is the smallest of the District Centres within LBRuT. The linear centre stretches along Percy Road, from the junction with Jubilee Avenue, to the roundabout at the northern end of High Street Whitton/Nelson Road. A few units within the centre are along Bridge Way. The centre is predominantly bound by residential areas and the railway line at the south.

The KSF is located along the majority of High Street Whitton. The SSF covers Percy Road, a small section at the northern edge of High Street Whitton which leads on to Nelson Road and Bridge Way. A small cluster of units on the southern side of the railway bridge do not have frontage designated but contain some useful services.

Whitton District centre’s key roles include:

- convenience shopping – good offer including two medium sized food stores operated by Lidl and Iceland and small stores for top-up shopping operated by Tesco Metro, **Sainsbury’s Local and Coop**. Supplemented by independent five convenience stores, three bakers, a butcher, greengrocer, off-license and sandwich shop;
- comparison shopping – limited selection and predominantly independent comparison retailers and charity shops selling lower order comparison goods.
- services – reasonable range of non-retail services given its size. Good selection of restaurants/cafes, hairdressers/beauty parlours and fast food/takeaway outlets.
- entertainment and evening economy – a good choice of restaurants, which may reflect its popularity on match days, although limited pubs/bars; and
- community facilities – including Whitton Library/community centre, three dentists, two physiotherapists, a chiropodist and post-office.

Mix of use and occupier representation

Whitton has 125 retail and service units. The diversity of uses within the centre is set out in Table W1, compared with the Goad Plan national average and Borough average.

Table W1 - Mix of shop and service uses – Whitton

Type	Number units	% units	LBRuT average	UK average
Comparison goods retail	34	27.2	27.7	29.0
Convenience goods retail	17	13.6	11.7	9.7
Financial/professional services	8	6.4	8.1	9.0
Restaurants/cafés	18	14.4	15.3	10.0
Pubs/bars	2	1.6	2.7	4.9
Hot food takeaways	5	4.0	3.8	6.2
Other non-retail services	31	24.8	20.6	16.5
Vacant	10	8.0	10.1	14.7
Total	125	100.0	100.0	100.0

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

The centre’s mix of units is broadly in line with the national average. Whitton town centre has a higher proportion of convenience retail uses compared with the national and Borough average. The comparison offer is slightly lower than the national average but in line the Borough average. The centre has a lower proportion of financial/professional services and pubs/bars than the national and Borough average.

There were 10 vacant units within the centre at the time of LBRuT’s Land Use Survey, equating to a vacancy rate of 8%, which is lower than the national and Borough average. Whitton town centre had an 8% vacancy rate in the 2014 study. The centre appears to have had a relatively stable vacancy rate over the past seven years which indicates it is healthy and viable.

Whitton has a limited selection of comparison shops (34), reflecting its role in the retail hierarchy to provide convenience goods and services. Two Goad comparison categories are not present in the centre (i.e. variety, department and catalogue and toys, hobby, cycle and sports) and the choice in seven categories is limited. Table W2 provides a breakdown of comparison units by category.

Table w2 - Mix of comparison goods uses – Whitton

Type	Number units	% units	LBRuT average	UK average
Clothing and footwear	2	5.9	14.4	21.5
Furniture, carpets and textiles	2	5.9	16.8	7.6
Books, arts, cards and stationers	1	2.9	5.7	7.7
Electrical, music and photography	6	17.6	7.6	9.1
DIY, hardware and homeware	2	5.9	6.0	6.6
China, glass and gifts	1	2.9	4.8	5.3
Cars, motorcycles and accessories	0	0.0	1.1	1.3
Chemists, drug stores and opticians	8	23.5	14.7	11.7
Variety, department and catalogue	0	0.0	0.3	1.8
Florists, nurserymen and seedsmen	1	2.9	4.4	2.2
Toys, hobby, cycle and sports	0	0.0	3.9	5.3
Jewellers	1	2.9	2.7	5.0
Charity and second-hand shops	5	14.7	7.4	9.9
Other comparison good retailers	5	14.7	10.2	5.0
Total	34	100.0	100.0	100.0

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

Whitton has a significantly higher proportion of electrical/music/photography; chemists/drug stores/opticians and other comparison goods retailers but a significantly lower proportion of clothing and footwear shops than the national and Borough average.

Whitton town centre has a limited number of multiple comparison retailers (excluding charity shops) for a District Centre. The multiple comparison retailers include:

Table W3 – Whitton’s comparison multiples

Boots Chemist	Card Factory	Superdrug	
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Source: Whitton land use survey 2021

Whitton has a reasonable range of non-retail services given its size (64 in total), with all but two categories represented (i.e. banks/other financial services and travel agents), as shown in Table W4.

Table W4 - Mix of service uses – Whitton

Type	Number Units	% units	LBRuT average	UK average
Restaurants/cafés	18	34.0	35.4	23.8
Fast food/takeaways	5	9.4	8.7	14.7
Pubs/bars	2	3.8	6.2	11.7
Banks/other financial services	0	0.0	3.5	8.6
Betting shops/casinos/amusement	3	5.7	1.6	3.8
Estate agents/valuers	4	7.5	9.6	7.9
Travel agents	0	0.0	0.7	1.7
Hairdressers/beauty parlours	18	34.0	28.1	26.1
Launderettes/dry cleaners	3	5.7	6.2	1.7
Sub-total	53	100.0	100.0	100.0
Other	11			
Total	64			

Source: LBRuT land use survey 2021 and Experian Goad Plan national averages.

There is a good selection of restaurants/cafes and hairdressers/beauty parlours, both of which are significantly higher than the national average. There are two pubs and three laundrettes which is reasonable for a centre of this size. The centre has no banks/other financial institutions.

The range of services is more limited than in the 2014 study which suggests **that the centre's role and offer in the retail hierarchy is evolving with a greater focus on comparison goods.**

Multiple food/beverage outlets include Costa, **Domino's** Pizza, KFC, Pizza Hut and Starbucks. The food/beverage uses include 10 restaurants, 12 cafés/coffee shops, 2 pubs/bars and 6 fast food/takeaway outlets which provide a reasonable mix of day-time facilities.

Commercial rents (VOA 2017)

According to the VOA, Zone A retail rents are relatively consistent throughout the centre. Along High Street Whitton, Zone A rents are £400 per sqm. A few units along Percy Road, in the southern part of the centre south of the railway station have Zone A rents of £330 per sqm. Overall, Whitton has the most consistent Zone A rents of the five centres in the Borough and the lowest prime pitch rates.

Catchment area

Whitton's **local catchment area** includes the wards of Whitton, Heathfield and West Twickenham (Zone 3).

The household survey results indicate 22% of respondents across the study area had used shops and services in Whitton in the last year, this is the lowest of the five town centres in the Borough. Approximately 73% of people living in the local area (Zone 3) had visited the centre. Only 1% of respondents indicated that they do most of their non-food shopping in Whitton, which is significantly lower than Richmond but the same as East Sheen. The retail capacity analysis suggests Whitton attracts over 80% of its trade from local zone 3.

The centre has a relatively localised catchment area when compared with Richmond, Teddington and Twickenham.

London Plan indicators

The London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. **Whitton's** designations are:

- Network classification: District centre
- Night-time classification: None
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Incremental
- Office guidelines: None
- Strategic area for regeneration: No

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Whitton in the last year. Of those who had used shops/services in Whitton, respondents were asked what they like about Whitton town centre and what would encourage them to visit more often. Circa. 28% of respondents like Whitton because it is close to home. The main factors mentioned (5% of respondents or more) were:

- *factors liked*: good range of independent shops (13%); you can get everything you need there (11%); good range of supermarkets (11%); good cafes/restaurants (10%); good range of non-food shops generally (10%); parking – it is **easy to find a space (5%); good range of 'high street' retailers; close to friends/relatives**; good range of affordable shops (5%); traditional/quaint (5%) and nice atmosphere/friendly people (5%).
- *improvements*: better/more clothing shops (7%); better/more friendly non-food shops generally (7%) and parking – more spaces available (6%).

The survey responses suggest that **people's views on** Whitton were largely positive especially in terms of the range of shops. 53% of respondents did not mention anything they would improve about the centre.

Accessibility

Public Transport Accessibility Levels (PTAL) are Level 2 across the centre (Source: TFL Webcat tool). This is the lowest of all the 5 centres in the Borough, although the centre does benefit from a BR station.

The household survey results suggest Whitton attracts customers by a variety of means of transport. Mode of travel for food shopping within the local area (Zone 3) is broadly in line with the study area. The highest proportions do their main food shopping by car (64%), followed by walking (19%). Mode of travel for non-food shopping within the local area (Zone 3) differs slightly to the study area. The highest proportions do their main food shopping by car (41%). However, this is followed by bus (21%) and then walking (18%).

Whitton town centre has reasonable public transport accessibility for a centre of its size. Whitton railway station is location at the south end of the centre. The station has regular trains to London Waterloo (London Waterloo Loop via Hounslow) and Windsor and Eaton Riverside. Cycle storage is also provided at the station.

The centre is served by two bus routes – 110 (to Hammersmith) and H22 (to Hounslow). Additional bus routes operate along Nelson Road, north of the centre boundary, including routes 110, 281, 481, 681 and H22 to. These bus routes link Whitton town centre with other centres in the Borough and other areas of London including Kingston, Hammersmith and Isleworth.

Whitton/Nelson Road car park serves both visitors to the centre and Iceland and Lidl customers (around half full at the time of the site visit). On street parking is popular with visitors to the centre. Sheffield stands for cycle parking are provided throughout the town centre.

Environment quality

The quality of buildings within Whitton is predominantly good. Retail uses are at the ground floor level with residential units above. The Telephone Exchange (site allocation SA13 in 2018 Local Plan) is an outstanding redevelopment opportunity.

The centre has a moderate to low level of traffic which is distributed evenly throughout the centre. Widened sections of High Street Whitton allow on street vehicle parking without inhibiting the flow of traffic through the centre. The centre has wide, good quality paving and adequate numbers of pedestrian crossings throughout. **At the time of the researcher's site visit**, pedestrian flows appeared heaviest along the KSF and around the railway station. There were no clusters of vacant buildings.

Overall, **at the time of the researcher's visit**, the centre felt safe during the daytime and there was no evidence of antisocial behaviour or begging. There was also no evidence of graffiti or vandalism but small amounts of commercial rubbish waiting to be collected. Limited trees throughout the centre but adequate street lighting and hanging baskets. Public benches appear worn but bright crossing/art is visually appealing. Public toilets were closed for maintenance at the time of the site visit.

Reported crime

Recorded crime within Whitton Metropolitan Police neighbourhood was 727 from May 2021-April 2022, lower than the average for the five town centres in the Borough (1,066 crimes). Violence and sexual offences represented 12% of total crimes, followed by anti-social behaviour (11%) and vehicle crime (7%).

Summary of Whitton's Strengths and Weaknesses

Strengths

- Vacancy rate lower than Borough and national average.
- Lower crime rate than average of main five centres.
- Good selection of restaurants/cafes, hairdressers/beauty parlours and fast food/takeaway outlets.
- Good convenience offer including two main food stores (Lidl and Iceland) and smaller top-up shops (Tesco Metro, **Sainsbury's Local and the Coop**).
- Most consistent Zone A rents lowest prime pitch rates of the five centres in the Borough

Weaknesses

- Limited number and selection of comparison shops and multiple retailers.
- Limited night-time facilities (i.e. only two pubs).
- Limited selection of services in several Goad categories.

Appendix 6 **Local Centres Analysis**

Appendix 6: Local Centres Analysis

Local Needs Index (LNI)

The existing provision of local shopping destinations within the Borough offers a balanced distribution of facilities serving local communities. These facilities complement the five main town and district centres and have an important role in serving the day-to-day needs in their local areas. In addition to the audit of the five town centres, a local needs index for the other local centres within the LBRuT has been undertaken. The local shopping destinations vary in size, from only 5 shops/service units to over 100 units. The key focus in auditing local destinations has been in assessing the "needs" of residents and to what extent each is meeting these "needs". There is no clear definition of need, but it is considered that residents could expect to find some, or most of the following shops, services and community uses within easy walking distance of their home:

- food or convenience store suitable for top-up shopping;
- bank;
- post office;
- newsagent;
- off licence;
- chemist;
- takeaway, café or restaurant;
- public house;
- bookmakers;
- laundrette/dry cleaners;
- hairdressers/beauty salon/barber;
- florist;
- estate agents;
- community hall;
- doctor's surgery; and
- library.

Each local destination and the five town centres has been allocated a score out of 16, based on the number of categories of shops and services listed above (one point per category represented in the centre). The local needs index is set out in the two tables overleaf. It is considered that the local needs index provides a useful indicator of whether a town, local, neighbourhood centre or important local parade is meeting some or all the needs of residents. The local needs index is not a precise measure of whether a local shopping centre is meeting the needs of residents, as there are many other factors to consider:

- the relative size of a local centre/parade will dictate the range of shops and services offered;
- the proximity of other town centres, local centres and 'standalone' shops means that local need may be met at an alternative location within walking distance and local needs are therefore still being met;
- the quality of the shopping centre or parade, in terms of its environment, type and range of retailers will affect how it is perceived and used by local residents; and

- the relative accessibility of each centre will be an important factor in how local people use the shops and services e.g. a major traffic route, which is difficult for pedestrians to cross, may influence shopping patterns in the area.

These scores are based on the representation of key retail/service provision within the centre/parade.

Local Needs Assessment

Destination name	Food/con	Bank	Post off.	Newsag.	Off lic.	Chemist	T/A, café	Pub	Bookm.	Laund/DC	Hairdr.	Florist	Est. agent	Com. hall	Dr surg.	Library
Richmond																
Twickenham																
East Sheen																
Teddington																
Whitton																
Barnes																
Hampton Hill																
Hampton Village																
East Twickenham																
St Margarets																
Kew Gardens																
Ham Parade																
White Hart Lane																
Hampton Wick																
Stanley Road																
Sheen Road																
Heathside																
Castelnau																
Friars Stile Road																
Kingston Road																
Twickenham Green																
Kew Road																
Sandycombe Road																
Kew Green																
Lower Mortlake Road																
Ham Street/Back Lane																
Waldegrave Road																
Whitton Road																
Strawberry Hill																
Fulwell																
Nelson Road																
St Margarets Road																
Ashburnham Road																
Hampton Nursery Lands																
Hospital Bridge Road																

Local Needs Summary

Destination name	Status	Total units	Local Needs Index	Number convenience shops	Number vacant units
Richmond	Major	344	13	26	43
Twickenham	District	276	14	33	20
East Sheen	District	275	13	28	33
Teddington	District	178	13	21	14
Whitton	District	125	12	17	10
Barnes	Local	116	10	18	10
Hampton Hill	Local	104	12	9	12
Hampton Village	Local	74	9	9	7
East Twickenham	Local	69	10	5	7
St Margarets	Local	59	10	10	4
Kew Gardens	Local	45	11	9	2
Ham Parade	Local	39	10	9	0
White Hart Lane	Neighbourhood	50	9	5	4
Hampton Wick	Neighbourhood	44	6	2	9
Stanley Road	Neighbourhood	39	8	3	1
Sheen Road	Neighbourhood	35	8	4	3
Heathside	Neighbourhood	33	5	7	4
Castelnau	Neighbourhood	23	8	5	3
Friars Stile Road	Neighbourhood	19	8	4	1
Kingston Road	Neighbourhood	18	5	4	0
Twickenham Green	Local parade	37	6	4	3
Kew Road	Local parade	32	5	3	3
Sandycombe Road	Local parade	31	7	2	2
Kew Green	Local parade	18	6	2	1
Lower Mortlake Road	Local parade	17	6	2	3
Ham Street/Back Lane	Local parade	15	5	2	3
Waldegrave Road	Local parade	14	4	2	1
Whitton Road	Local parade	13	6	6	2
Strawberry Hill	Local parade	13	5	3	0
Fulwell	Local parade	11	5	2	3
Nelson Road	Local parade	11	3	2	1
St Margarets Road	Local parade	9	3	2	2
Ashburnham Road	Local parade	8	4	3	2
Hampton Nursery Lands	Local parade	7	4	2	1
Hospital Bridge Road	Local parade	5	4	3	0

Source: LBRuT's land use survey 2021

There are a wide range of scores across the centres. All centres have a least one convenience goods shop/store, catering for top-up food and grocery shopping needs. Other facilities available within most centres include hot food takeaways/cafés and hairdressers/barber. Chemists, off-licences and launderettes/dry cleaners are available in most local centres/parades.

Banks/building societies are now only available within three of the town centres. Nationally, banks/building have rationalised their portfolios by closing branches in smaller centres. Few centres now have libraries. Many local authorities have rationalised the number of libraries. The number of post offices has also reduced

significantly. Less than a quarter of centres now have a post office. Other facilities that are available in the minority of local centres include: bookmakers, florists, community halls **and doctors' surgeries**.

Overall, the five town centres and larger local centres i.e. Barnes and Hampton Hill have the highest scores (10 or more on the local needs index). In addition to this it is important to consider the ability of these centres in meeting top-up shopping needs and the number of convenience stores with the ability to provide local top-up shopping (e.g. a grocer, local corner shop or small supermarket) in the centre is also considered.

Most local/neighbourhood centres and local parades are meeting most local needs. As indicated, all centres have at least one convenience store, and most have at least one takeaway/café and a hairdresser. The local needs index suggests that 23 of 35 centres/parades are meeting at least six of the identified local needs, but 6 local parades provide less than 5 of the essential shops and services. Some of these centres have limited facilities with a local needs index of only 3. These centres may be under threat if shop/service closures occur in the future.

The designated centres and parades and their respective scores are plotted on a plan overleaf. A 400 metres radius from each centre is also shown, which is considered a reasonable walking distance within the London Plan.

This plan demonstrates most households within the LBRuT have at least one designated centre or parade within easy walking distance (400 metres). There are only a few built up areas without provision within 400 metres. This network of centres should continue to be protected to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.



Celebrating

60
years

Birmingham

0121 713 1530

birmingham@lichfields.uk

Edinburgh

0131 285 0670

edinburgh@lichfields.uk

Manchester

0161 837 6130

manchester@lichfields.uk

Bristol

0117 403 1980

bristol@lichfields.uk

Leeds

0113 397 1397

leeds@lichfields.uk

Newcastle

0191 261 5685

newcastle@lichfields.uk

Cardiff

029 2043 5880

cardiff@lichfields.uk

London

020 7837 4477

london@lichfields.uk

Thames Valley

0118 334 1920

thamesvalley@lichfields.uk



@LichfieldsUK

lichfields.uk