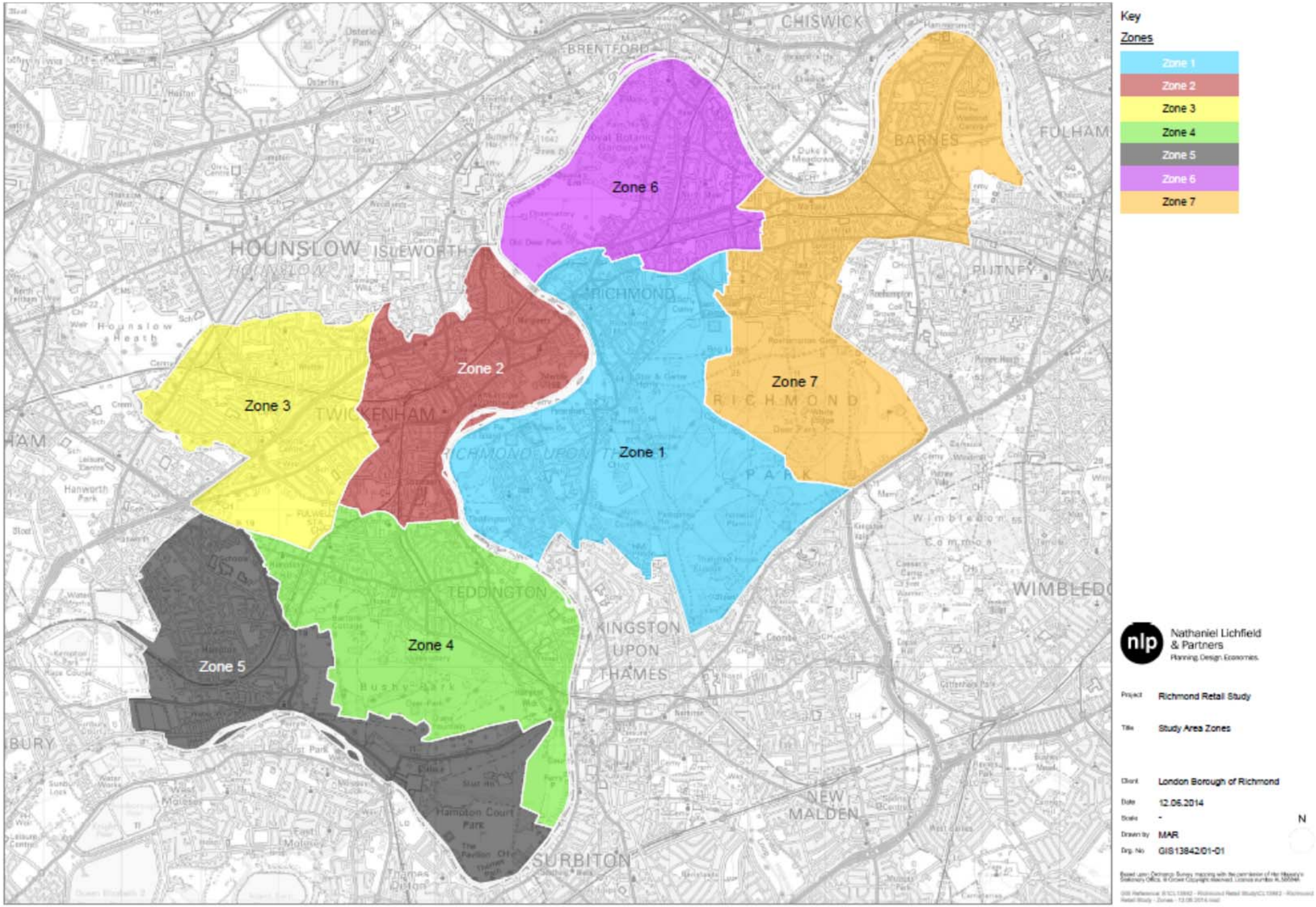
Appendix 1 Study Area and Methodology

LB Richmond Study Area Zones

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


Key
Zones
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Zone 7
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Zone 7
CHISWICK
BRENTFORD
BARNES
FULHAM
PUTNEY
HOUNSLOW
ISLEWORTH
RICHMOND
TWICKENHAM
RICHMOND PARK
TEDDINGTON
KINGSTON UPON THAMES
WIMBLEDON
NEW MALDEN
SURBITON
Hampton Court Park
Bushy Park
Nathaniel Lichfield & Partners
Planning Design Economics
Project Richmond Retail Study
Title Study Area Zones
Client London Borough of Richmond
Date 12.06.2014
Scale -
Drawn by MAR
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Retail Capacity Assessment – Methodology and Data

Price Base

1 All monetary values expressed in this study are at 2012 prices, consistent with Experian's base year expenditure figures for 2012 (Retail Planner Briefing Note 11) which is the most up to date information available.

Study Area

2 The quantitative analysis is based on the Borough study area, which covers the primary catchment areas of the five main shopping destinations in LBRuT. The study area is sub-divided into seven zones based on ward boundaries as shown above. The survey zones take into consideration the extent of the catchment area of the main centres in LBRuT.

Retail Expenditure

3 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 2012 have been obtained.

4 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 11, September 2013) 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.

5 Experian's EBS growth forecast rates for 2012 to 2015 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.6% for 2012-2013, -0.3% for 2013 to 2014 and +0.1% for 2014 to 2015; for comparison goods: 3.2% for 2012-2013, 2.3% for 2013-2014 and 2.8% for 2014-2015).

6 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. 0.8% per annum for convenience goods after 2015 and 2.9% 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.

7 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 retail sales in 2012 is:

- 7% of convenience goods expenditure; and
- 14% of comparison goods expenditure.

8 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT 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 2012 are:

- 2.1% of convenience goods expenditure; and
- 10.5% of comparison goods expenditure.

9 The projections provided by Experian suggest that these percentages could increase to 4% and 15.1% by 2019 respectively, and estimated at 5.9% and 15.9% by 2024. These figures have been adopted in this assessment.

10 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

11 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2020.

12 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales

may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

13 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 March 2014 household survey.

14 The total turnover of shops within the Borough is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery Retailers) and Mintel Retail Rankings information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

15 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

16 The estimated convenience goods sales areas have been derived from a combination of the Institute of Grocery Distribution (IGD), GOAD plans, Valuation Office data and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

17 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within the Borough and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £6,000 per sq.m net for convenience shops/stores in the study area. This is consistent with NLP's experience of retail studies across London. The total benchmark turnover of identified convenience sales floorspace within LBRuT is £331 million (Table 9, Appendix 2).

18 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data

suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m net. For retail warehouse operators the average sales density is generally lower at around £2,500 per sq.m net.

Appendix 2 Convenience Goods Capacity

Table 1: Study Area Population

Zone	2014	2017	2019	2024	2029
Zone 1 - Richmond	21,848	22,573	22,945	23,974	23,473
Zone 2 - Twickenham	32,772	33,852	34,280	35,399	37,291
Zone 3 - Whitton	31,673	32,419	32,639	33,111	33,591
Zone 4 - Teddington	31,701	32,743	33,244	33,983	34,627
Zone 5 - Hampton	20,008	20,544	20,738	21,289	21,857
Zone 6 - Kew/North Richmond	22,881	23,529	23,787	24,465	24,975
Zone 7 - Barnes/East Sheen	32,431	33,292	33,679	34,749	35,617
Total	**193,314**	**198,952**	**201,312**	**206,970**	**211,431**

Sources: GLA 2013 Round Trend Based Population Projections - Central (ward) projection

Table 2: Convenience Goods Expenditure per person (£)

Zone	2014	2017	2019	2024	2029
Zone 1 - Richmond	2,314	2,334	2,360	2,432	2,515
Zone 2 - Twickenham	2,127	2,146	2,169	2,236	2,312
Zone 3 - Whitton	2,091	2,109	2,132	2,197	2,272
Zone 4 - Teddington	2,098	2,117	2,139	2,205	2,281
Zone 5 - Hampton	2,150	2,169	2,192	2,260	2,337
Zone 6 - Kew/North Richmond	2,241	2,260	2,285	2,355	2,436
Zone 7 - Barnes/East Sheen	2,363	2,384	2,410	2,484	2,569

Sources: Experian Local Expenditure 2012 (2012 prices)

Growth Rates: -0.6% 2012-2013, -0.3% 2013-2014, 0.1% 2014-2015 and 0.8% p.a. from 2015
Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m)

Zone	2014	2017	2019	2024	2029
Zone 1 - Richmond	50.56	52.69	54.14	58.32	59.04
Zone 2 - Twickenham	69.71	72.64	74.35	79.15	86.22
Zone 3 - Whitton	66.21	68.36	69.57	72.76	76.33
Zone 4 - Teddington	66.52	69.30	71.12	74.95	78.97
Zone 5 - Hampton	43.02	44.56	45.47	48.12	51.08
Zone 6 - Kew/North Richmond	51.27	53.19	54.35	57.63	60.83
Zone 7 - Barnes/East Sheen	76.65	79.37	81.16	86.32	91.49
Total	**423.95**	**440.11**	**450.16**	**477.24**	**503.97**

Source: Tables 1 and 2

Table 4: Base Year 2014 Convenience Goods Market Shares (%)

Centre	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow
Richmond	42.7%	12.9%	1.0%	0.5%	0.3%	46.7%	33.2%	20.0%
Twickenham	0.3%	38.3%	13.5%	4.0%	0.8%	3.9%	0.4%	15.0%
Teddington	0.0%	4.1%	0.6%	41.8%	0.9%	0.0%	0.0%	15.0%
Whitton	0.0%	0.0%	35.2%	0.0%	0.1%	1.2%	0.0%	10.0%
East Sheen	14.9%	1.0%	0.1%	0.4%	0.0%	14.5%	30.7%	15.0%
Hampton/Hampton Hill	3.3%	9.9%	17.3%	28.9%	76.8%	0.1%	0.0%	10.0%
Other in LB Richmond	20.8%	9.8%	2.0%	3.4%	0.1%	18.5%	19.9%	5.0%
LB Richmond Total	**82.0%**	**76.0%**	**69.7%**	**79.0%**	**79.0%**	**84.9%**	**84.2%**	
Food Stores in LB Hounslow/Ealing/Hammersmith	1.3%	15.6%	28.9%	7.1%	5.9%	8.1%	6.6%	n/a
Food Stores in Elmbridge/Spelthorne	0.0%	0.0%	1.0%	0.9%	12.6%	1.0%	0.0%	n/a
Food Stores in Kingston	14.5%	7.4%	0.4%	11.3%	0.5%	0.1%	3.0%	n/a
Food Stores in LB Wandsworth	1.8%	0.0%	0.0%	0.2%	0.0%	5.7%	4.1%	n/a
Other	0.4%	1.0%	0.0%	1.5%	2.0%	0.2%	2.1%	n/a
Other Sub-Total	**18.0%**	**24.0%**	**30.3%**	**21.0%**	**21.0%**	**15.1%**	**15.8%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household and In-Street Surveys March 2014 and NLP analysis

Table 5: Base Year 2014 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2014	**50.56**	**69.71**	**66.21**	**66.52**	**43.02**	**51.27**	**76.65**		**423.95**
Richmond Town	21.59	8.99	0.66	0.33	0.13	23.95	25.45	20.27	101.37
Twickenham	0.15	26.70	8.94	2.66	0.34	2.00	0.31	7.25	48.35
Teddington	0.00	2.86	0.40	27.80	0.39	0.00	0.00	5.55	37.00
Whitton	0.00	0.00	23.31	0.00	0.04	0.62	0.00	2.66	26.63
East Sheen	7.53	0.70	0.07	0.27	0.00	7.43	23.53	6.98	46.50
Hampton/ Hampton Hill	1.67	6.90	11.45	19.22	33.04	0.05	0.00	8.04	80.38
Other in LB Richmond	10.52	6.83	1.32	2.26	0.04	9.49	15.25	2.41	48.12
LB Richmond Total	**41.46**	**52.98**	**46.15**	**52.55**	**33.99**	**43.53**	**64.54**	**53.16**	**388.36**
Food Stores in LB Hounslow	0.66	10.87	19.14	4.72	2.54	4.15	5.06	n/a	47.14
Food Stores in Elmbridge	0.00	0.00	0.66	0.60	5.42	0.51	0.00	n/a	7.19
Food Stores in Kingston	7.33	5.16	0.26	7.52	0.22	0.05	2.30	n/a	22.84
Food Stores in LB Wandsworth	0.91	0.00	0.00	0.13	0.00	2.92	3.14	n/a	7.11
Other	0.20	0.70	0.00	1.00	0.86	0.10	1.61	n/a	4.47
Other Sub-Total	**9.10**	**16.73**	**20.06**	**13.97**	**9.03**	**7.74**	**12.11**	**n/a**	**88.75**
TOTAL	**50.56**	**69.71**	**66.21**	**66.52**	**43.02**	**51.27**	**76.65**	**n/a**	**477.11**

Source: Table 3 and 4

Table 6: Future 2017 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2017	**52.69**	**72.64**	**68.36**	**69.30**	**44.56**	**53.19**	**79.37**		**440.11**
Richmond Town	22.50	9.37	0.68	0.35	0.13	24.84	26.35	21.06	105.28
Twickenham	0.16	27.82	9.23	2.77	0.36	2.07	0.32	7.54	50.27
Teddington	0.00	2.98	0.41	28.97	0.40	0.00	0.00	5.78	38.54
Whitton	0.00	0.00	24.06	0.00	0.04	0.64	0.00	2.75	27.50
East Sheen	7.85	0.73	0.07	0.28	0.00	7.71	24.37	7.24	48.24
Hampton/ Hampton Hill	1.74	7.19	11.83	20.03	34.22	0.05	0.00	8.34	83.40
Other in LB Richmond	10.96	7.12	1.37	2.36	0.04	9.84	15.79	2.50	49.98
LB Richmond Total	**43.21**	**55.20**	**47.65**	**54.75**	**35.20**	**45.16**	**66.83**	**55.20**	**403.20**
Food Stores in LB Hounslow	0.69	11.33	19.76	4.92	2.63	4.31	5.24	n/a	48.87
Food Stores in Elmbridge	0.00	0.00	0.68	0.62	5.61	0.53	0.00	n/a	7.45
Food Stores in Kingston	7.64	5.38	0.27	7.83	0.22	0.05	2.38	n/a	23.78
Food Stores in LB Wandsworth	0.95	0.00	0.00	0.14	0.00	3.03	3.25	n/a	7.37
Other	0.21	0.73	0.00	1.04	0.89	0.11	1.67	n/a	4.64
Other Sub-Total	**9.48**	**17.43**	**20.71**	**14.55**	**9.36**	**8.03**	**12.54**	**n/a**	**92.11**
TOTAL	**52.69**	**72.64**	**68.36**	**69.30**	**44.56**	**53.19**	**79.37**	**n/a**	**495.31**

Source: Table 3 and 4

Table 7: Future 2019 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2019	**54.14**	**74.35**	**69.57**	**71.12**	**45.47**	**54.35**	**81.16**		**450.16**
Richmond Town	23.12	9.59	0.70	0.36	0.14	25.38	26.94	21.56	107.78
Twickenham	0.16	28.48	9.39	2.84	0.36	2.12	0.32	7.71	51.39
Teddington	0.00	3.05	0.42	29.73	0.41	0.00	0.00	5.93	39.53
Whitton	0.00	0.00	24.49	0.00	0.05	0.65	0.00	2.80	27.98
East Sheen	8.07	0.74	0.07	0.28	0.00	7.88	24.92	7.40	49.37
Hampton/ Hampton Hill	1.79	7.36	12.04	20.55	34.92	0.05	0.00	8.52	85.23
Other in LB Richmond	11.26	7.29	1.39	2.42	0.05	10.05	16.15	2.56	51.17
LB Richmond Total	**44.40**	**56.51**	**48.49**	**56.19**	**35.92**	**46.14**	**68.34**	**56.48**	**412.46**
Food Stores in LB Hounslow	0.70	11.60	20.11	5.05	2.68	4.40	5.36	n/a	49.90
Food Stores in Elmbridge	0.00	0.00	0.70	0.64	5.73	0.54	0.00	n/a	7.61
Food Stores in Kingston	7.85	5.50	0.28	8.04	0.23	0.05	2.43	n/a	24.38
Food Stores in LB Wandsworth	0.97	0.00	0.00	0.14	0.00	3.10	3.33	n/a	7.54
Other	0.22	0.74	0.00	1.07	0.91	0.11	1.70	n/a	4.75
Other Sub-Total	**9.75**	**17.84**	**21.08**	**14.94**	**9.55**	**8.21**	**12.82**	**n/a**	**94.18**
TOTAL	**54.14**	**74.35**	**69.57**	**71.12**	**45.47**	**54.35**	**81.16**	**n/a**	**506.64**

Source: Table 3 and 4

Table 8: Future 2024 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2024	**58.32**	**79.15**	**72.76**	**74.95**	**48.12**	**57.63**	**86.32**		**477.24**
Richmond Town	24.90	10.21	0.73	0.37	0.14	26.91	28.66	22.98	114.91
Twickenham	0.17	30.31	9.82	3.00	0.38	2.25	0.35	8.17	54.45
Teddington	0.00	3.25	0.44	31.33	0.43	0.00	0.00	6.25	41.70
Whitton	0.00	0.00	25.61	0.00	0.05	0.69	0.00	2.93	29.28
East Sheen	8.69	0.79	0.07	0.30	0.00	8.36	26.50	7.89	52.60
Hampton/ Hampton Hill	1.92	7.84	12.59	21.66	36.95	0.06	0.00	9.00	90.02
Other in LB Richmond	12.13	7.76	1.46	2.55	0.05	10.66	17.18	2.73	54.50
LB Richmond Total	**47.82**	**60.15**	**50.71**	**59.21**	**38.01**	**48.92**	**72.68**	**59.95**	**437.46**
Food Stores in LB Hounslow	0.76	12.35	21.03	5.32	2.84	4.67	5.70	n/a	52.66
Food Stores in Elmbridge	0.00	0.00	0.73	0.67	6.06	0.58	0.00	n/a	8.04
Food Stores in Kingston	8.46	5.86	0.29	8.47	0.24	0.06	2.59	n/a	25.96
Food Stores in LB Wandsworth	1.05	0.00	0.00	0.15	0.00	3.28	3.54	n/a	8.02
Other	0.23	0.79	0.00	1.12	0.96	0.12	1.81	n/a	5.04
Other Sub-Total	**10.50**	**19.00**	**22.05**	**15.74**	**10.10**	**8.70**	**13.64**	**n/a**	**99.72**
TOTAL	**58.32**	**79.15**	**72.76**	**74.95**	**48.12**	**57.63**	**86.32**	**n/a**	**537.19**

Source: Table 3 and 4

Table 9: Future 2029 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2029	**59.04**	**86.22**	**76.33**	**78.97**	**51.08**	**60.83**	**91.49**		**503.97**
Richmond Town	25.21	11.12	0.76	0.39	0.15	28.41	30.38	24.11	120.54
Twickenham	0.18	33.02	10.30	3.16	0.41	2.37	0.37	8.79	58.60
Teddington	0.00	3.53	0.46	33.01	0.46	0.00	0.00	6.61	44.07
Whitton	0.00	0.00	26.87	0.00	0.05	0.73	0.00	3.07	30.72
East Sheen	8.80	0.86	0.08	0.32	0.00	8.82	28.09	8.29	55.25
Hampton/ Hampton Hill	1.95	8.54	13.20	22.82	39.23	0.06	0.00	9.53	95.34
Other in LB Richmond	12.28	8.45	1.53	2.69	0.05	11.25	18.21	2.87	57.32
LB Richmond Total	**48.42**	**65.53**	**53.20**	**62.39**	**40.36**	**51.65**	**77.04**	**63.27**	**461.84**
Food Stores in LB Hounslow	0.77	13.45	22.06	5.61	3.01	4.93	6.04	n/a	55.86
Food Stores in Elmbridge	0.00	0.00	0.76	0.71	6.44	0.61	0.00	n/a	8.52
Food Stores in Kingston	8.56	6.38	0.31	8.92	0.26	0.06	2.74	n/a	27.23
Food Stores in LB Wandsworth	1.06	0.00	0.00	0.16	0.00	3.47	3.75	n/a	8.44
Other	0.24	0.86	0.00	1.18	1.02	0.12	1.92	n/a	5.35
Other Sub-Total	**10.63**	**20.69**	**23.13**	**16.58**	**10.73**	**9.19**	**14.46**	**n/a**	**105.40**
TOTAL	**59.04**	**86.22**	**76.33**	**78.97**	**51.08**	**60.83**	**91.49**	**n/a**	**567.24**

Source: Table 3 and 4

Table 10: Convenience Goods Floorspace 2014

Source: LB Richmond Land Use Survey 2013, IGD, Goad and VOA

Centre	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Richmond	Waitrose, Sheen Road, Richmond	1,827	85%	1,553	£11,865	£18.43
	Tesco Metro, George Street, Richmond	1,282	90%	1,154	£11,080	£12.78
	Marks & Spencer, George Street, Richmond	1,033	95%	981	£11,253	£11.04
	Marks & Spencer Simply Food, Railway Station	200	95%	190	£11,253	£2.14
	Sainsbury Local, The Quadrant, Richmond	120	95%	114	£13,619	£1.55
	Other convenience shops, Richmond Town Centre	1,000	100%	1,000	£6,000	£6.00
	Sainsbury's, Lower Richmond Road, North Sheen	3,397	80%	2,718	£13,619	£37.01
	Sub-Total	**8,859**		**7,710**		**£88.95**
Twickenham	Waitrose, London Road	2,003	90%	1,803	£11,865	£21.39
	Tesco Express, Heath Road	200	95%	190	£11,080	£2.11
	Morrison's M Local, Heath Road	400	95%	380	£12,649	£4.81
	Marks & Spencer Simply Food, Heath Road	269	95%	256	£11,253	£2.88
	Iceland, King Street, Twickenham	465	95%	442	£7,295	£3.22
	Other convenience shops, Twickenham	1,500	100%	1,500	£6,000	£9.00
	Sub-Total	**4,837**		**4,570**		**£43.40**
Teddington	Marks & Spencer Simply Food, High Street	825	95%	784	£11,253	£8.82
	Tesco Metro, Broad Street, Teddington	903	90%	813	£11,080	£9.00
	Morisson's M Local, Broad Street	320	95%	304	£12,649	£3.85
	Budgens, High Street, Teddington	134	95%	127	£7,000	£0.89
	Other convenience shops, Teddington	1,000	100%	1,000	£6,000	£6.00
	Sub-Total	**3,182**		**3,028**		**£28.56**
Whitton	Iceland, High Street, Whitton	443	95%	421	£7,295	£3.07
	Tesco Metro, High Street, Whitton	225	95%	214	£11,080	£2.37
	Lidl, High Street, Whitton	300	85%	255	£3,138	£0.80
	Other convenience shops, Whitton	900	100%	900	£6,000	£5.40
	Sub-Total	**1,868**		**1,790**		**£11.64**
East Sheen	Waitrose, Upper Richmond Road, East Sheen	2,517	90%	2,265	£11,865	£26.88
	Tesco Express, Upper Richmond Road, East Sheen	250	95%	238	£11,080	£2.63
	Tesco Mortlake Express, Sheen Lane	220	95%	209	£11,080	£2.32
	Other convenience shops, East Sheen	1,400	100%	1,400	£6,000	£8.40
	Sub-Total	**4,387**		**4,112**		**£40.23**
Hampton Hill/Hampton	Tesco Express, Hampton Hill	154	95%	146	£11,080	£1.62
	Sainsbury's Local, Hampton Hill	275	95%	261	£13,619	£3.56
	Other convenience shops, Hampton	1,200	100%	1,200	£6,000	£7.20
	Sainsbury's, Tangley Park Road, Hampton	925	90%	833	£13,619	£11.34
	Waitrose, Hampton Village	582	90%	524	£11,865	£6.21
	Sainsbury's, Uxbridge Road, Hampton	5,256	70%	3,679	£13,619	£50.11
	Sub-Total	**8,392**		**6,643**		**£80.04**
Other Stores	Tesco Express, St Margarets Road	209	95%	199	£11,080	£2.20
	Other convenience shops, St Margarets	450	100%	450	£5,000	£2.25
	Sainsbury's Local, Barnes High Street	280	95%	266	£13,619	£3.62
	Sainsbury's Local, White Hart Lane	250	95%	238	£13,619	£3.23
	Other convenience shops, Barnes/Mortlake	950	100%	950	£6,000	£5.70
	Tesco Express, Station Approach, Kew Road	158	95%	150	£11,080	£1.66
	Tesco Esso Express, Castelnau	166	95%	158	£11,080	£1.75
	Sainsbury's Local, The Green, Twickenham	180	95%	171	£13,619	£2.33
	Marks & Spencers, Kew Retail Park	1,000	100%	1,000	£11,253	£11.25
	Tesco Express, Ashburnham Road, Ham	353	95%	335	£11,080	£3.72
	Other local shops in LB Richmond	3,600	100%	3,600	£6,000	£21.60
	Sub-Total	**7,596**		**7,516**		**£59.32**
LB Richmond Total		**39,121**		**35,368**	**9,956**	**£352.13**

Table 11: Summary of Convenience Goods Expenditure 2014 to 2029

	Centre	2014	2017	2019	2024	2029
Available Expenditure in LBRuT (£m)	Richmond	101.37	105.28	107.78	114.91	120.54
	Twickenham	48.35	50.27	51.39	54.45	58.60
	Teddington	37.00	38.54	39.53	41.70	44.07
	Whitton	26.63	27.50	27.98	29.28	30.72
	East Sheen	46.50	48.24	49.37	52.60	55.25
	Hampton/Hampton Hill	80.38	83.40	85.23	90.02	95.34
	Other in LB Richmond	48.12	49.98	51.17	54.50	57.32
	Total	**388.36**	**403.20**	**412.46**	**437.46**	**461.84**
Turnover of Existing Floorspace and Commitments (£m)	Richmond	101.37	101.37	101.37	101.37	101.37
	Twickenham	48.35	48.35	48.35	48.35	48.35
	Teddington (1) (4)	37.00	43.40	43.40	43.40	43.40
	Whitton (2)	26.63	30.25	30.25	30.25	30.25
	East Sheen	46.50	46.50	46.50	46.50	46.50
	Hampton/Hampton Hill	80.38	80.38	80.38	80.38	80.38
	Other in LB Richmond (3)	48.12	54.12	54.12	54.12	54.12
	Total	**388.36**	**404.38**	**404.38**	**404.38**	**404.38**
Surplus/Deficit Expenditure (£m)	Richmond	n/a	3.91	6.41	13.54	19.16
	Twickenham	n/a	1.91	3.04	6.10	10.24
	Teddington	n/a	-4.86	-3.86	-1.70	0.68
	Whitton	n/a	-2.75	-2.26	-0.97	0.47
	East Sheen	n/a	1.73	2.86	6.10	8.74
	Hampton/Hampton Hill	n/a	3.02	4.85	9.64	14.96
	Other in LB Richmond	n/a	-4.14	-2.96	0.38	3.20
	Total	**n/a**	**-1.18**	**8.08**	**33.09**	**57.46**

Source: Tables 5 to 10

1) Large store commitment in Kingston Road Teddington - 250 sq. net - turnover = £3 million
2) Sainsbury's food store under contruction in Whitton High Street - 280 sq. net - turnover = £3.62 million
3) Large store commitment in Barnes High Street - 518 sq. net - turnover = £6 million
4) Sainsbury's Local store commitment in Teddington High Street - 250 sq. net - turnover = £3.4 million

Table 12: Convenience Goods Floorspace Capacity 2014 to 2029

	Centre	2014	2017	2019	2024	2029
Turnover Density New Floorspace (£ per sq.m)		£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Projection (sq.m net)	Richmond	n/a	300	493	1,041	1,474
	Twickenham	n/a	147	234	469	788
	Teddington	n/a	-374	-297	-131	52
	Whitton	n/a	-212	-174	-75	36
	East Sheen	n/a	133	220	469	673
	Hampton/Hampton Hill	n/a	232	373	742	1,151
	Other in LB Richmond	n/a	-319	-227	29	246
	Total	**n/a**	**-91**	**621**	**2,545**	**4,420**
Floorspace Projection (sq.m gross)	Richmond	n/a	429	704	1,488	2,106
	Twickenham	n/a	210	334	670	1,126
	Teddington	n/a	-534	-424	-187	75
	Whitton	n/a	-302	-249	-107	52
	East Sheen	n/a	190	314	670	961
	Hampton/Hampton Hill	n/a	332	534	1,060	1,644
	Other in LB Richmond	n/a	-455	-325	42	352
	Total	**n/a**	**-130**	**888**	**3,636**	**6,315**

Appendix 3 Comparison Goods Capacity

Table 1: Study Area Population

Zone	2011	2014	2017	2019	2024	2029
Zone 1 - Richmond	21,137	21,848	22,573	22,945	23,974	23,473
Zone 2 - Twickenham	31,555	32,772	33,852	34,280	35,399	37,291
Zone 3 - Whitton	30,593	31,673	32,419	32,639	33,111	33,591
Zone 4 - Teddington	30,682	31,701	32,743	33,244	33,983	34,627
Zone 5 - Hampton	19,372	20,008	20,544	20,738	21,289	21,857
Zone 6 - Kew/North Richmond	22,085	22,881	23,529	23,787	24,465	24,975
Zone 7 - Barnes/East Sheen	31,566	32,431	33,292	33,679	34,749	35,617
Total	**186,990**	**193,314**	**198,952**	**201,312**	**206,970**	**211,431**

Sources: *GLA 2012 Round of Demographic Projections - SHLAA-based ward projections*

Table 2: Comparison Goods Expenditure per person (£)

Zone	2014	2017	2019	2024	2029
Zone 1 - Richmond	4,206	4,465	4,656	5,321	6,131
Zone 2 - Twickenham	3,799	4,033	4,206	4,806	5,538
Zone 3 - Whitton	3,245	3,444	3,592	4,105	4,730
Zone 4 - Teddington	3,583	3,803	3,966	4,532	5,222
Zone 5 - Hampton	3,461	3,673	3,831	4,377	5,044
Zone 6 - Kew/North Richmond	4,006	4,252	4,434	5,067	5,839
Zone 7 - Barnes/East Sheen	4,254	4,515	4,709	5,381	6,200

Sources:
Experian Local Expenditure 2012 (2012 prices)

Growth Rates: 3.2% 2012-2013, 2.3% 2013-2014, 2.8% 2014-2015 and 2.9% p.a. from 2015
Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

Zone	2014	2017	2019	2024	2029
Zone 1 - Richmond	91.90	100.78	106.83	127.56	143.91
Zone 2 - Twickenham	124.51	136.51	144.16	170.13	206.51
Zone 3 - Whitton	102.78	111.66	117.24	135.91	158.88
Zone 4 - Teddington	113.58	124.52	131.84	154.01	180.83
Zone 5 - Hampton	69.24	75.46	79.44	93.19	110.25
Zone 6 - Kew/North Richmond	91.65	100.03	105.47	123.96	145.82
Zone 7 - Barnes/East Sheen	137.96	150.31	158.58	186.98	220.84
Total	**731.62**	**799.27**	**843.56**	**991.75**	**1167.04**

Source: Tables 1 and 2

Table 4: Base Year 2014 Comparison Goods Market Shares (%)

Centre/Facility	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow
Richmond	35.3%	17.1%	6.8%	5.7%	4.3%	33.0%	18.9%	40.0%
Twickenham	0.5%	18.1%	14.5%	4.1%	1.6%	1.4%	1.1%	30.0%
East Sheen	3.1%	0.1%	0.4%	0.7%	0.0%	7.0%	19.5%	20.0%
Teddington	0.8%	1.9%	1.0%	14.9%	1.1%	0.2%	0.1%	30.0%
Whitton	0.1%	0.5%	11.3%	0.0%	0.3%	0.0%	0.2%	10.0%
Kew Retail Park	2.7%	3.2%	2.5%	0.2%	0.9%	18.0%	6.6%	35.0%
Other shops in LB Richmond	1.3%	1.6%	2.0%	4.2%	12.9%	2.6%	5.7%	10.0%
LB Richmond Total	**43.8%**	**42.5%**	**38.5%**	**29.8%**	**21.1%**	**62.2%**	**52.1%**	
West End/Central London	13.6%	4.8%	1.3%	3.4%	1.4%	6.3%	10.5%	n/a
LB Kingston upon Thames	34.9%	34.3%	29.1%	55.8%	51.5%	19.7%	18.4%	n/a
LB Hounslow/Ealing/Hammersmith	2.8%	9.9%	23.7%	5.5%	14.1%	6.0%	9.2%	n/a
Elmbridge/Spelthorne	0.2%	1.3%	2.8%	0.4%	2.6%	0.2%	0.0%	n/a
LB Wandsworth/Merton	0.5%	0.8%	0.2%	0.2%	0.1%	0.9%	3.4%	n/a
Other	4.2%	6.4%	4.4%	4.9%	9.2%	4.7%	6.4%	n/a
Other Sub-Total	**56.2%**	**57.5%**	**61.5%**	**70.2%**	**78.9%**	**37.8%**	**47.9%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey March 2014

Table 5: Base Year 2014 Comparison Goods Expenditure (£m)

Area	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2013	**91.90**	**124.51**	**102.78**	**113.58**	**69.24**	**91.65**	**137.96**		**731.62**
Richmond	32.44	21.29	6.99	6.47	2.98	30.25	26.07	84.33	210.82
Twickenham	0.46	22.54	14.90	4.66	1.11	1.28	1.52	19.91	66.38
East Sheen	2.85	0.12	0.41	0.80	0.00	6.42	26.90	9.37	46.87
Teddington	0.74	2.37	1.03	16.92	0.76	0.18	0.14	9.49	31.62
Whitton	0.09	0.62	11.61	0.00	0.21	0.00	0.28	1.42	14.24
Kew Retail Park	2.48	3.98	2.57	0.23	0.62	16.50	9.11	19.11	54.60
Other shops in LB Richmond	1.19	1.99	2.06	4.77	8.93	2.38	7.86	3.24	32.43
LB Richmond Total	**40.25**	**52.92**	**39.57**	**33.85**	**14.61**	**57.01**	**71.88**	**146.88**	**456.95**
West End/Central London	12.50	5.98	1.34	3.86	0.97	5.77	14.49	n/a	44.90
LB Kingston upon Thames	32.07	42.71	29.91	63.38	35.66	18.06	25.38	n/a	247.16
LB Hounslow/Ealing/Hammersmith	2.57	12.33	24.36	6.25	9.76	5.50	12.69	n/a	73.46
Elmbridge/Spelthorne	0.18	1.62	2.88	0.45	1.80	0.18	0.00	n/a	7.12
LB Wandsworth/Merton	0.46	1.00	0.21	0.23	0.07	0.82	4.69	n/a	7.47
Other	3.86	7.97	4.52	5.57	6.37	4.31	8.83	n/a	41.42
Other Sub-Total	**51.65**	**71.59**	**63.21**	**79.73**	**54.63**	**34.64**	**66.08**	**n/a**	**421.54**
TOTAL	**91.90**	**124.51**	**102.78**	**113.58**	**69.24**	**91.65**	**137.96**		**878.49**

Source: Table 3 and 4

Table 6: Future 2017 Comparison Goods Expenditure (£m)

Area	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2017	**100.78**	**136.51**	**111.66**	**124.52**	**75.46**	**100.03**	**150.31**		**799.27**
Richmond	35.57	23.34	7.59	7.10	3.24	33.01	28.41	92.18	230.46
Twickenham	0.50	24.71	16.19	5.11	1.21	1.40	1.65	21.76	72.53
East Sheen	3.12	0.14	0.45	0.87	0.00	7.00	29.31	10.22	51.12
Teddington	0.81	2.59	1.12	18.55	0.83	0.20	0.15	10.39	34.64
Whitton	0.10	0.68	12.62	0.00	0.23	0.00	0.30	1.55	15.48
Kew Retail Park	2.72	4.37	2.79	0.25	0.68	18.01	9.92	20.86	59.59
Other shops in LB Richmond	1.31	2.18	2.23	5.23	9.73	2.60	8.57	3.54	35.40
LB Richmond Total	**44.14**	**58.02**	**42.99**	**37.11**	**15.92**	**62.22**	**78.31**	**160.50**	**499.21**
West End/Central London	13.71	6.55	1.45	4.23	1.06	6.30	15.78	n/a	49.09
LB Kingston upon Thames	35.17	46.82	32.49	69.48	38.86	19.71	27.66	n/a	270.19
LB Hounslow/Ealing/Hammersmith	2.82	13.51	26.46	6.85	10.64	6.00	13.83	n/a	80.12
Elmbridge/Spelthorne	0.20	1.77	3.13	0.50	1.96	0.20	0.00	n/a	7.76
LB Wandsworth/Merton	0.50	1.09	0.22	0.25	0.08	0.90	5.11	n/a	8.15
Other	4.23	8.74	4.91	6.10	6.94	4.70	9.62	n/a	45.25
Other Sub-Total	**56.64**	**78.49**	**68.67**	**87.41**	**59.54**	**37.81**	**72.00**	**n/a**	**460.56**
TOTAL	**100.78**	**136.51**	**111.66**	**124.52**	**75.46**	**100.03**	**150.31**		**959.77**

Source: Table 3 and 4

Table 7: Future 2019 Comparison Goods Expenditure (£m)

Area	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2019	**106.83**	**144.16**	**117.24**	**131.84**	**79.44**	**105.47**	**158.58**		**843.56**
Richmond	37.71	24.65	7.97	7.51	3.42	34.80	29.97	97.36	243.40
Twickenham	0.53	26.09	17.00	5.41	1.27	1.48	1.74	22.94	76.46
East Sheen	3.31	0.14	0.47	0.92	0.00	7.38	30.92	10.79	53.94
Teddington	0.85	2.74	1.17	19.64	0.87	0.21	0.16	10.99	36.65
Whitton	0.11	0.72	13.25	0.00	0.24	0.00	0.32	1.63	16.26
Kew Retail Park	2.88	4.61	2.93	0.26	0.71	18.98	10.47	22.00	62.86
Other shops in LB Richmond	1.39	2.31	2.34	5.54	10.25	2.74	9.04	3.73	37.34
LB Richmond Total	**46.79**	**61.27**	**45.14**	**39.29**	**16.76**	**65.60**	**82.62**	**169.44**	**526.91**
West End/Central London	14.53	6.92	1.52	4.48	1.11	6.64	16.65	n/a	51.86
LB Kingston upon Thames	37.28	49.45	34.12	73.57	40.91	20.78	29.18	n/a	285.28
LB Hounslow/Ealing/Hammersmith	2.99	14.27	27.78	7.25	11.20	6.33	14.59	n/a	84.42
Elmbridge/Spelthorne	0.21	1.87	3.28	0.53	2.07	0.21	0.00	n/a	8.17
LB Wandsworth/Merton	0.53	1.15	0.23	0.26	0.08	0.95	5.39	n/a	8.61
Other	4.49	9.23	5.16	6.46	7.31	4.96	10.15	n/a	47.75
Other Sub-Total	**60.04**	**82.89**	**72.10**	**92.55**	**62.68**	**39.87**	**75.96**	**n/a**	**486.09**
TOTAL	**106.83**	**144.16**	**117.24**	**131.84**	**79.44**	**105.47**	**158.58**		**1013.00**

Source: Table 3 and 4

Table 8: Future 2024 Comparison Goods Expenditure (£m)

Area	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2024	**127.56**	**170.13**	**135.91**	**154.01**	**93.19**	**123.96**	**186.98**		**991.75**
Richmond	45.03	29.09	9.24	8.78	4.01	40.91	35.34	114.93	287.33
Twickenham	0.64	30.79	19.71	6.31	1.49	1.74	2.06	26.89	89.62
East Sheen	3.95	0.17	0.54	1.08	0.00	8.68	36.46	12.72	63.61
Teddington	1.02	3.23	1.36	22.95	1.03	0.25	0.19	12.87	42.89
Whitton	0.13	0.85	15.36	0.00	0.28	0.00	0.37	1.89	18.88
Kew Retail Park	3.44	5.44	3.40	0.31	0.84	22.31	12.34	25.89	73.98
Other shops in LB Richmond	1.66	2.72	2.72	6.47	12.02	3.22	10.66	4.39	43.86
LB Richmond Total	**55.87**	**72.30**	**52.33**	**45.90**	**19.66**	**77.10**	**97.42**	**199.57**	**620.15**
West End/Central London	17.35	8.17	1.77	5.24	1.30	7.81	19.63	n/a	61.26
LB Kingston upon Thames	44.52	58.35	39.55	85.94	47.99	24.42	34.40	n/a	335.18
LB Hounslow/Ealing/Hammersmith	3.57	16.84	32.21	8.47	13.14	7.44	17.20	n/a	98.88
Elmbridge/Spelthorne	0.26	2.21	3.81	0.62	2.42	0.25	0.00	n/a	9.56
LB Wandsworth/Merton	0.64	1.36	0.27	0.31	0.09	1.12	6.36	n/a	10.14
Other	5.36	10.89	5.98	7.55	8.57	5.83	11.97	n/a	56.14
Other Sub-Total	**71.69**	**97.82**	**83.59**	**108.12**	**73.53**	**46.86**	**89.56**	**n/a**	**571.17**
TOTAL	**127.56**	**170.13**	**135.91**	**154.01**	**93.19**	**123.96**	**186.98**		**1191.32**

Source: Table 3 and 4

Table 9: Future 2029 Comparison Goods Expenditure (£m)

Area	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2029	**143.91**	**206.51**	**158.88**	**180.83**	**110.25**	**145.82**	**220.84**		**1167.04**
Richmond	50.80	35.31	10.80	10.31	4.74	48.12	41.74	134.55	336.38
Twickenham	0.72	37.38	23.04	7.41	1.76	2.04	2.43	32.05	106.84
East Sheen	4.46	0.21	0.64	1.27	0.00	10.21	43.06	14.96	74.80
Teddington	1.15	3.92	1.59	26.94	1.21	0.29	0.22	15.14	50.48
Whitton	0.14	1.03	17.95	0.00	0.33	0.00	0.44	2.21	22.11
Kew Retail Park	3.89	6.61	3.97	0.36	0.99	26.25	14.58	30.50	87.14
Other shops in LB Richmond	1.87	3.30	3.18	7.59	14.22	3.79	12.59	5.17	51.72
LB Richmond Total	**63.03**	**87.77**	**61.17**	**53.89**	**23.26**	**90.70**	**115.06**	**234.59**	**729.46**
West End/Central London	19.57	9.91	2.07	6.15	1.54	9.19	23.19	n/a	71.62
LB Kingston upon Thames	50.23	70.83	46.23	100.90	56.78	28.73	40.63	n/a	394.34
LB Hounslow/Ealing/Hammersmith	4.03	20.44	37.65	9.95	15.55	8.75	20.32	n/a	116.69
Elmbridge/Spelthorne	0.29	2.68	4.45	0.72	2.87	0.29	0.00	n/a	11.30
LB Wandsworth/Merton	0.72	1.65	0.32	0.36	0.11	1.31	7.51	n/a	11.98
Other	6.04	13.22	6.99	8.86	10.14	6.85	14.13	n/a	66.24
Other Sub-Total	**80.88**	**118.75**	**97.71**	**126.94**	**86.99**	**55.12**	**105.78**	**n/a**	**672.17**
TOTAL	**143.91**	**206.51**	**158.88**	**180.83**	**110.25**	**145.82**	**220.84**		**1401.63**

Source: Table 3 and 4

Table 10: Comparison Goods Floorspace 2014

Centres	Floorspace (sq.m gross)	Sales Floorspace (sq.m net)
Richmond town centre	36,860	25,802
Richmond food stores	n/a	1,143
Retail Warehouses Manor Road, Richmond	5,600	4,760
Twickenham centre	12,510	8,757
Twickenham food stores	n/a	267
East Sheen centre	13,860	9,702
East Sheen food stores	n/a	275
Teddington centre	9,910	6,937
Teddington food stores	n/a	154
Whitton centre	3,470	2,429
Whitton food stores	n/a	78
Barnes/Mortlake	4,400	3,080
Hampton/Hampton Hill	4,720	3,304
Other food stores in the Borough	n/a	1,829
Kew Retail Park	14,700	11,760
Other shops in Richmond	6,600	4,620
	112,630	**84,897**

Source: Goad Plans, Valuation Office, LB Richmond Land Use Survey and NLP

Table 11: Summary of Comparison Goods Expenditure 2014 to 2029

	Centre	2014	2017	2019	2024	2029
Available Expenditure in LBRuT (£m)	Richmond	210.82	230.46	243.40	287.33	336.38
	Twickenham	66.38	72.53	76.46	89.62	106.84
	East Sheen	46.87	51.12	53.94	63.61	74.80
	Teddington	31.62	34.64	36.65	42.89	50.48
	Whitton	14.24	15.48	16.26	18.88	22.11
	Kew Retail Park	54.60	59.59	62.86	73.98	87.14
	Other in LB Richmond	32.43	35.40	37.34	43.86	51.72
	Total	**456.95**	**499.21**	**526.91**	**620.15**	**729.46**
Turnover of Existing Facilities (£m)	Richmond	210.82	223.72	232.76	256.99	283.73
	Twickenham	66.38	70.44	73.29	80.91	89.34
	East Sheen	46.87	49.74	51.75	57.14	63.08
	Teddington	31.62	33.56	34.91	38.55	42.56
	Whitton	14.24	15.11	15.72	17.35	19.16
	Kew Retail Park	54.60	57.94	60.28	66.55	73.48
	Other in LB Richmond	32.43	34.42	35.81	39.54	43.65
	Total	**456.95**	**484.92**	**504.51**	**557.03**	**615.00**
Surplus/Defecit Expenditure (£m)	Richmond	n/a	6.73	10.64	30.34	52.64
	Twickenham	n/a	2.09	3.18	8.71	17.50
	East Sheen	n/a	1.38	2.19	6.47	11.72
	Teddington	n/a	1.09	1.74	4.34	7.92
	Whitton	n/a	0.37	0.54	1.52	2.95
	Kew Retail Park	n/a	1.66	2.58	7.43	13.66
	Other in LB Richmond	n/a	0.98	1.53	4.32	8.07
	Total	**n/a**	**14.29**	**22.40**	**63.13**	**114.46**

Source: Tables 5 to 10

Table 12: Comparison Goods Floorspace Capacity 2014 to 2029

Centre		2014	2017	2019	2024	2029
Turnover Density New Floorspace (£ per sq.m)	**Turnover Density New Floorspace (£ per sq.m)**	£6,000	£6,367	£6,624	£7,314	£8,075
Floorspace Requirement (sq.m net)	Richmond	n/a	1,058	1,607	4,148	6,519
	Twickenham	n/a	328	480	1,191	2,167
	Teddington	n/a	216	331	885	1,451
	Whitton	n/a	171	262	593	981
	East Sheen/Barnes/Mortlake	n/a	58	81	208	366
	Hampton Hampton Hill	n/a	260	389	1,015	1,692
	Other in LB Richmond	n/a	154	231	590	999
	Total	**n/a**	**2,244**	**3,381**	**8,631**	**14,175**
Floorspace Requirement (sq.m gross)	Richmond	n/a	1,410	2,142	5,531	8,692
	Twickenham	n/a	437	640	1,588	2,890
	Teddington	n/a	288	441	1,180	1,935
	Whitton	n/a	227	349	791	1,307
	East Sheen/Barnes/Mortlake	n/a	77	109	278	488
	Hampton Hampton Hill	n/a	347	519	1,354	2,256
	Other in LB Richmond	n/a	205	308	787	1,332
	Total	**n/a**	**2,992**	**4,508**	**11,508**	**18,899**

Appendix 4 Food and Drink Capacity

Table 1: Food and Drink Expenditure per person (£)

Zone	2014	2017	2019	2024	2029
Zone 1 - Richmond	1,448	1,510	1,552	1,664	1,784
Zone 2 - Twickenham	1,334	1,390	1,430	1,533	1,643
Zone 3 - Whitton	984	1,026	1,055	1,131	1,212
Zone 4 - Teddington	1,204	1,255	1,291	1,384	1,483
Zone 5 - Hampton	1,081	1,127	1,159	1,243	1,332
Zone 6 - Kew/North Richmond	1,395	1,454	1,495	1,603	1,718
Zone 7 - Barnes/East Sheen	1,486	1,550	1,593	1,708	1,831

Sources: Experian Local Expenditure 2012 (2012 prices) Growth Rates: -0.2% 2012-2013, 0.7% 2013-2014, and 1.4% from 2014

Table 2: Total Food and Drink Expenditure (£m)

Zone	2014	2017	2019	2024	2029
Zone 1 - Richmond	31.64	34.08	35.62	39.90	41.88
Zone 2 - Twickenham	43.71	47.07	49.01	54.25	61.26
Zone 3 - Whitton	31.16	33.25	34.42	37.44	40.71
Zone 4 - Teddington	38.17	41.10	42.91	47.02	51.36
Zone 5 - Hampton	21.64	23.16	24.04	26.45	29.12
Zone 6 - Kew/North Richmond	31.92	34.22	35.57	39.22	42.92
Zone 7 - Barnes/East Sheen	48.20	51.59	53.66	59.35	65.22
Total	**246.43**	**264.48**	**275.23**	**303.63**	**332.46**

Source: Table 1 and population Table 1 Appendix 2

Table 3: Base Year 2014 Food and Drink Market Shares (%)

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

Source: NEMS Household and In-Street Surveys March 2014 and NLP analysis

Table 4: Base Year 2014 Food and Drink Expenditure (£m)

Centre/Facility	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2014	**31.64**	**43.71**	**31.16**	**38.17**	**21.64**	**31.92**	**48.20**		**246.43**
Richmond	20.57	13.99	7.32	5.92	1.41	13.05	9.35	47.74	119.34
Twickenham	0.35	16.52	10.19	0.27	1.32	0.54	0.10	12.55	41.84
Teddington	1.27	4.06	4.33	21.98	3.92	0.32	0.05	8.98	44.91
Whitton	0.00	0.00	5.11	0.11	1.25	0.00	0.00	2.78	9.26
East Sheen	0.51	0.00	0.00	0.50	0.00	4.66	12.05	4.43	22.14
Barnes	0.00	0.00	0.28	0.00	0.50	0.57	15.23	4.15	20.73
Other in LB Richmond	1.93	0.79	0.34	4.20	7.94	5.87	0.34	2.38	23.79
LB Richmond Total	**24.62**	**35.36**	**27.58**	**32.98**	**16.34**	**25.02**	**37.12**	**83.00**	**282.00**
Other	7.02	8.35	3.58	5.19	5.30	6.89	11.09	n/a	47.43
TOTAL	**31.64**	**43.71**	**31.16**	**38.17**	**21.64**	**31.92**	**48.20**	**n/a**	**329.43**

Source: Table 2 and 3

Table 5: Future 2017 Food and Drink Expenditure (£m)

Centre/Facility	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2017	**34.08**	**47.07**	**33.25**	**41.10**	**23.16**	**34.22**	**51.59**		**264.48**
Richmond	22.15	15.06	7.81	6.37	1.51	14.00	10.01	51.27	128.18
Twickenham	0.37	17.79	10.87	0.29	1.41	0.58	0.10	13.47	44.90
Teddington	1.36	4.38	4.62	23.67	4.19	0.34	0.05	9.66	48.28
Whitton	0.00	0.00	5.45	0.12	1.34	0.00	0.00	2.97	9.89
East Sheen	0.55	0.00	0.00	0.53	0.00	5.00	12.90	4.74	23.72
Barnes	0.00	0.00	0.30	0.00	0.53	0.62	16.30	4.44	22.19
Other in LB Richmond	2.08	0.85	0.37	4.52	8.50	6.30	0.36	2.55	25.52
LB Richmond Total	**26.52**	**38.08**	**29.43**	**35.51**	**17.49**	**26.83**	**39.73**	**89.10**	**302.67**
Other	7.57	8.99	3.82	5.59	5.67	7.39	11.87	n/a	50.90
TOTAL	**34.08**	**47.07**	**33.25**	**41.10**	**23.16**	**34.22**	**51.59**	**n/a**	**353.58**

Source: Table 2 and 3

Table 6: Future 2019 Food and Drink Expenditure (£m)

Centre/Facility	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2019	**35.62**	**49.01**	**34.42**	**42.91**	**24.04**	**35.57**	**53.66**		**275.23**
Richmond	23.15	15.68	8.09	6.65	1.56	14.55	10.41	53.40	133.50
Twickenham	0.39	18.52	11.26	0.30	1.47	0.60	0.11	13.99	46.65
Teddington	1.42	4.56	4.79	24.71	4.35	0.36	0.05	10.06	50.30
Whitton	0.00	0.00	5.65	0.13	1.39	0.00	0.00	3.07	10.24
East Sheen	0.57	0.00	0.00	0.56	0.00	5.19	13.42	4.93	24.67
Barnes	0.00	0.00	0.31	0.00	0.55	0.64	16.96	4.62	23.08
Other in LB Richmond	2.17	0.88	0.38	4.72	8.82	6.54	0.38	2.66	26.55
LB Richmond Total	**27.71**	**39.65**	**30.47**	**37.07**	**18.15**	**27.89**	**41.32**	**92.73**	**314.98**
Other	7.91	9.36	3.96	5.84	5.89	7.68	12.34	n/a	52.98
TOTAL	**35.62**	**49.01**	**34.42**	**42.91**	**24.04**	**35.57**	**53.66**	**n/a**	**367.96**

Source: Table 2 and 3

Table 7: Future 2019 Food and Drink Expenditure (£m)

Centre/Facility	Zone 1 Richmond	Zone 2 Twickenham	Zone 3 Whitton	Zone 4 Teddington	Zone 5 Hampton	Zone 6 Kew/N.Richmond	Zone 7 Barnes/E.Sheen	% Inflow	Total
Expenditure 2024	**39.90**	**54.25**	**37.44**	**47.02**	**26.45**	**39.22**	**59.35**		**303.63**
Richmond	25.93	17.36	8.80	7.29	1.72	16.04	11.51	59.10	147.75
Twickenham	0.44	20.51	12.24	0.33	1.61	0.67	0.12	15.39	51.31
Teddington	1.60	5.05	5.20	27.08	4.79	0.39	0.06	11.04	55.21
Whitton	0.00	0.00	6.14	0.14	1.53	0.00	0.00	3.35	11.16
East Sheen	0.64	0.00	0.00	0.61	0.00	5.73	14.84	5.45	27.27
Barnes	0.00	0.00	0.34	0.00	0.61	0.71	18.76	5.10	25.51
Other in LB Richmond	2.43	0.98	0.41	5.17	9.71	7.22	0.42	2.93	29.26
LB Richmond Total	**31.04**	**43.89**	**33.13**	**40.62**	**19.97**	**30.75**	**45.70**	**102.37**	**347.47**
Other	8.86	10.36	4.31	6.39	6.48	8.47	13.65	n/a	58.52
TOTAL	**39.90**	**54.25**	**37.44**	**47.02**	**26.45**	**39.22**	**59.35**	**n/a**	**405.99**

Source: Table 2 and 3

Table 8: Food and Drink Units/Floorspace 2014

Centre	Class A3	Class A4	Class A5	Total Units	Total Floorspace
Richmond town centre	57	8	24	89	12,000
Twickenham	41	13	17	71	10,700
Teddington	26	8	5	39	7,300
Whitton	12	1	4	17	1,500
East Sheen	23	5	9	37	5,100
Barnes	14	4	1	19	1,900
Other LBRT	116	28	42	186	18,600
LB Richmond Total	**289**	**67**	**102**	**458**	**57,100**

Source: LB Richmond Land use Surevy 2013 and Goad

Table 10: Summary of Food and Drink Expenditure 2014 to 2029

	Centre	2014	2017	2019	2024	2025
Available Expenditure in LBRuT (£m)	Richmond	119.34	128.18	133.50	147.75	160.75
	Twickenham	41.84	44.90	46.65	51.31	57.04
	Teddington	44.91	48.28	50.30	55.21	60.47
	Whitton	9.26	9.89	10.24	11.16	12.17
	East Sheen	22.14	23.72	24.67	27.27	29.88
	Barnes	20.73	22.19	23.08	25.51	28.02
	Other in LB Richmond	23.79	25.52	26.55	29.26	31.99
	Total	**282.00**	**302.67**	**314.98**	**347.47**	**380.33**
Tunrover of existing facilities in LBRuT (£m)	Richmond	119.34	122.95	125.43	131.82	138.55
	Twickenham	41.84	43.10	43.97	46.21	48.57
	Teddington	44.91	46.27	47.20	49.61	52.14
	Whitton	9.26	9.54	9.73	10.23	10.75
	East Sheen	22.14	22.81	23.27	24.46	25.71
	Barnes	20.73	21.36	21.79	22.90	24.07
	Other in LB Richmond	23.79	24.51	25.00	26.28	27.62
	Total	**282.00**	**290.55**	**296.39**	**311.51**	**327.40**
Surplus/Deficit Expenditure (£m)	Richmond	n/a	5.23	8.07	15.93	22.20
	Twickenham	n/a	1.79	2.68	5.10	8.47
	Teddington	n/a	2.01	3.10	5.60	8.33
	Whitton	n/a	0.35	0.51	0.94	1.42
	East Sheen	n/a	0.90	1.40	2.81	4.18
	Barnes	n/a	0.83	1.29	2.61	3.95
	Other in LB Richmond	n/a	1.02	1.55	2.98	4.38
	Total	**n/a**	**12.13**	**18.59**	**35.96**	**52.93**

Source: Tables 4 to 9

Table 11: Food and Drink Floorspace Capacity 2014 to 2029

	Centre	2014	2017	2019	2024	2029
Turnover Sales Density (£ per Sq.M Gross)		£5,000	£5,152	£5,255	£5,523	£5,805
Floorspace Projection (sq.m gross)	Richmond	n/a	1,015	1,536	2,884	3,824
	Twickenham	n/a	348	509	923	1,459
	Teddington	n/a	389	590	1,013	1,435
	Whitton	n/a	68	97	170	245
	East Sheen	n/a	176	266	509	720
	Barnes	n/a	161	245	472	681
	Other in LB Richmond	n/a	197	295	540	754
	Total	**n/a**	**2,354**	**3,538**	**6,512**	**9,118**

Source: Table 10

Appendix 5 Audit of Centres

A. Richmond town centre

Richmond town centre is the main shopping and commercial centre within LBRuT, and is located in the centre of the Borough. It is defined as the Major Town Centre for the borough in the adopted Core Strategy (2009). The centre has a variety of retail and service uses. The key roles of Richmond town centre include:

- **Convenience shopping:** The centre has a selection of food supermarkets including Waitrose, Tesco Metro, Sainsbury's Local and Marks & Spencer Simply Food. These food stores are supported by a small selection of bakers and health food stores.
- **Comparison shopping:** there is an equal mix of national multiple retailers and small independent traders. The fashion sector is strong and House of Fraser and Marks & Spencer are key anchor stores.
- **Services**: provides a good range and choice of services including high street banks, estate agents, hairdressers, cafes, restaurants and bars.
- **Entertainment/Tourism:** cinema, theatre, art gallery and Thames Riverside.
- **Community facilities:** Library and health centre.

Mix of Uses and Retailer Occupation

Richmond town centre (as defined by Goad Plans) has a total of 372 retail/service uses. LBRuT's health check report 2012 identified 349 units. The diversity of uses present in the Goad area for Richmond town centre in terms of the number of units is set out in Table A.1, compared against the national average.

Table A.1 Richmond Town Centre Use Class Mix by Unit

Type of Unit	Units 2014	% of Total Number of Units	
		Richmond%	UK Average (1)
Comparison Retail	153	41.1	36.0
Convenience Retail	22	5.9	8.1
A1 Services (2)	53	14.2	14.1
A2 Services	33	8.9	12.1
A3/A5	65	17.5	14.7
A4 Pubs/bars	24	6.5	2.9
Vacant (3)	22	5.9	12.1
Total	**372**	**100.0**	**100.0**

Source: Goad Plans April 2013 and NLP 2014.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) incl. Class A vacant units.

The centre's mix of units broadly in line with the national average. The vacancy rate is considerably lower than the national average which indicates a healthy, vital and viable centre.

Retailer Representation

Richmond town centre has a good selection of comparison shops (152) reflecting its size and role in the shopping hierarchy. Table A.2 provides a breakdown of comparison shop units by category.

Table A.2 Richmond town centre Breakdown of Comparison Units

Type of Unit	Richmond		% UK Average*
	Units	%	
Clothing and footwear	67	43.8	25.0
Furniture, carpets and textiles	6	3.9	7.4
Booksellers, arts, crafts and stationers	9	5.9	10.6
Electrical, gas, music and photography	9	5.9	9.4
DIY, hardware and homewares	5	3.3	6.4
China, glass, gifts and fancy goods	5	3.3	4.6
Cars, motorcycles and motor access	0	0.0	1.3
Chemists, drug stores and opticians	14	9.1	10.0
Variety, department and catalogue	3	2.0	1.6
Florists, nurserymen and seedsmen	2	1.3	2.3
Toys, hobby, cycle and sport	5	3.3	5.2
Jewellers	12	7.8	5.0
Charity/ Second-hand	4	2.6	8.4
Other comparison retailers	12	7.8	2.9
Total	**153**	**100.0**	**100.0**

Source: Goad Plan April 2013 and NLP 2014
*UK average for all town centres surveyed by Goad Plans (March 2014)

The centre has representation in all the Goad Plan comparison categories apart from cars, motorcycles and motor access goods. There is a reasonable choice of shops within each category. The ‘other’ comparison retailer category includes a number of art and antique shops (8).

There is an excellent choice and range of clothing/footwear shops and jewellers. In terms of market sector, many of these outlets are upmarket or upper-middle market e.g. Joseph, Russell & Bromley, Reiss, Hobbs, Ted Baker, TM Lewin and LK Bennett.

The 2013 health check indicated that 51% of comparison goods shops where multiple retailers, 77 outlets compared with the GB index of 107 outlets.

Service Uses

Richmond town centre has a good range of non-retail service uses, with all categories present (see Table A.3). Richmond has a particularly high proportion of cafés and restaurants (there are only 8 Class A5 takeaways) and dry cleaners.

Table A.3 Richmond Town Centre Analysis of Selected Service Uses

Type of Unit	Richmond		% UK Average*
	Units	%	
Restaurants/cafés/takeaways	57	34.4	23.3
Fast food/takeaways	24	14.5	15.2
Pubs/bars	8	4.8	7.6
Banks/other financial services	14	8.4	12.9
Betting Shops/Casinos	3	1.8	4.0
Estate agents/valuers	16	9.6	9.5
Travel agents	1	0.6	2.5
Hairdressers/beauty parlours	33	19.9	22.9
Laundries/dry cleaners	10	6.0	2.2
Sub-Total	**166**	**100.0**	**100.0**
Other A1 Retail Services	9		
Total	**175**		

Source: Goad Plan April 2013 and NLP 2014
*UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

Based on NLP 2014 survey there were 22 vacant retail (Class A) units within Richmond town centre, a vacancy rate of 6.3% and significantly below the Goad national average of 12.1%. The vacant units are dispersed throughout the centre.

LBRuT has monitored the vacancy rate within the town centre from 2000 to 2012. Before the recession (2000 to 2008) the number of vacant shop units was consistently low, ranging from 16 to 22 units. During the economic downturn (2008 to 2011) the number of vacant shops increased to 40, but improved to 29 in 2012. The latest 2014 figure suggests a further improvement to pre-recession vacancy rates.

Retail Rents

The relative performance of and influence of retail centres can be demonstrated by reviewing the commercial property values, for example zone A rental levels achieved for rental property.

Richmond town centre has the highest Zone A retail rents in the Borough. The highest Zone A rents are around £2,100 to £2,152.50 per sq.m, which are achieved in George Street. Within The Quadrant Zone A rents are lower at £1,650 per sq.m (Source VOA, 2014).

Stakeholders Comments

- The limited number of retailers in Richmond town centre when compared to Kingston “is a weakness”.

- There is a lack of central parking facilities (or awareness of existing parking) and car parking is expensive in Richmond. The centre needs better parking facilities; and free parking should be considered in the evening.
- Anecdotal feedback suggests footfall has dropped in Richmond in recent years.
- Richmond is the key shopping centre in the borough with the department store as an anchor.
- Very well connected by transport, with the train station and bus stops.
- Vacant shops remain vacant for longer than the smaller centres.
- The main hub of activity on the borough.
- Always known as a place characterised by independent businesses.
- Attractive shopping environment, unlike big shopping centres, as it provides a nicer day out with the river and nice places to eat.
- The river and green spaces are an added benefit.
- Car Parking – Business Improvement District areas like Kingston can offer free parking days at Christmas for example, Richmond needs to become a BID to compete.
- By becoming a Business Improvement District all the retailers will be able to contribute equally to improving the town centre.
- Starting to lose its independent businesses due to high rents from the landlords who think because it is Richmond shops can pay higher rents.
- Lots of office space has been lost recently to residential development and this means less office workers spending money on the high street.
- The planning department needs to become more business friendly.
- The centre should promote late night shopping events.
- Has a good mix of all different retail units. A one stop, self-contained destination.
- Good tourist destination, with the River and the Park.
- Attractive town centre.
- Good places to eat and spend time in the evening.
- Should focus on seeking to attract visitors from nearby town centres i.e. Kingston and Hampton.

Richmond’s Strengths and Weaknesses

Strengths

- The in-street survey results indicate that Richmond attracts customers from a wide area, extending beyond the Borough.

- Richmond is an attractive centre with good quality buildings and high environmental quality. The river provides an attractive focal point.
- The centre has a good selection of national multiple retailers, especially towards the mid to higher end of the market.
- The proportion of vacant units within the centre is significantly below the national average.
- Shop property values are the highest in the Borough, which suggests the viability of development should be the highest in Richmond.
- There is a strong evening economy offer within the cinema with a cinema and a number of restaurants, pubs and bars.

Weaknesses

- Richmond has a more limited choice and range of shops when compared with nearby metropolitan centres i.e. Kingston and Hounslow.
- There are limited larger retail units within the centre, or opportunities for development, which may limit potential expansion.

B. Twickenham

Twickenham is the second largest shopping and commercial centre within LBRuT and is a defined District Centre within the adopted Core Strategy (2009). It is located to the west of the borough. The key roles of Twickenham include:

- **Convenience shopping:** Waitrose, Marks & Spencer Simply Food, Tesco Express, Iceland and Morrisons Local provide the main convenience, which could serve both main food and top up shopping but likely to mostly include the latter. These are supported by a small selection of butchers, bakers, off licenses, newsagents and a delicatessen.
- **Comparison shopping:** a mix of national multiple and independent retailers primarily located along King Street and Heath Road.
- **Services:** provides a good range and choice of services including high street banks, estate agents, hairdressers, cafes, restaurants, pubs and takeaways;
- **Entertainments:** a number of public houses are located throughout the centre and RFU stadium is nearby;
- **Community facilities:** medical surgeries, library, sport club, council offices and a social club.

Mix of Uses and Occupier Representation

Twickenham has a total of 276 retail/service uses. The diversity of uses present in Twickenham in terms of the number of units is set out in Table B.1, compared against the national average.

Table B.1 Twickenham Use Class Mix by Unit

Type of Unit	Units 2014	% of Total Number of Units	
		Twickenham%	UK Average (1)
Comparison Retail	72	26.1	36.0
Convenience Retail	28	10.1	8.1
A1 Services (2)	44	16.0	14.1
A2 Services	33	12.0	12.1
A3/A5	58	21.0	14.7
A4 pubs/bar	13	4.7	2.9
Vacant (3)	28	10.1	12.1
Total	**276**	**100.0**	**100.0**

Source: Goad Plans May 2013 and NLP 2014.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) incl. Class A vacant units.

The centre's mix of units is broadly similar to the national average although it has a notably lower proportion of comparison units suggesting Twickenham plays a retail service role in the retail hierarchy. The proportion of restaurants, cafes and takeaways is higher than the national average which reflects its role as a leisure destination, especially on match days with the nearby Rugby Stadium. The vacancy rate of this centre is slightly lower than the national average.

Retailer Representation

Table B.2 provides a breakdown of comparison shop units by category.

Table B.2 Twickenham Breakdown of Comparison Units

Type of Unit	Twickenham		% UK Average*
	Units	%	
Clothing and footwear	10	13.9	25.0
Furniture, carpets and textiles	10	13.9	7.4
Booksellers, arts, crafts and stationers	9	12.5	10.6
Electrical, gas, music and photography	8	11.1	9.4
DIY, hardware and homewares	4	5.6	6.4
China, glass, gifts and fancy goods	0	0	4.6
Cars, motorcycles and motor access	3	4.1	1.3
Chemists, drug stores and opticians	10	13.9	10.0
Variety, department and catalogue	0	0	1.6
Florists, nurserymen and seedsmen	2	2.8	2.3
Toys, hobby, cycle and sport	5	6.9	5.2
Jewellers	0	0	5.0
Charity Shops/Second-hand	8	11.1	8.4
Other comparison retailers	3	4.2	2.9
Total	**72**	**100.0**	**100.0**

Source: Goad Plan May 2013
*UK average for all town centres surveyed by Goad Plans (March 2014)

The centre does not provide all the Goad Plan comparison categories and the range of comparison goods within the centre is only fair. However, within the categories the centre does provide the choice is good.

Service Uses

Twickenham has a good range of non-retail service uses, with all categories present and well represented (see Table B.3) reflecting the size of Twickenham and its service role in the shopping hierarchy. The centre has a high proportion of pubs and bars. These uses benefit from the proximity to Twickenham Stadium.

Table B.3 Twickenham Analysis of Selected Service Uses

Type of Unit	Twickenham		% UK Average*
	Units	%	
Restaurants/cafés	41	30.6	23.3
Fast food/takeaways	17	12.7	15.2
Pubs/bars	13	9.7	7.6
Banks/other financial services	13	9.7	12.9
Betting shops/casinos	4	3.0	4.0
Estate agents/valuers	16	11.9	9.5
Travel agents	3	2.2	2.5
Hairdressers/beauty parlours	23	17.2	22.9
Laundries/dry cleaners	4	3.0	2.2
Sub-Total	**134**	**100.0**	**100.0**
Other A1 Services	14	n/a	n/a
Total	**148**	**n/a**	**n/a**

Source: Goad Plan May 2013
*UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were 28 vacant retail (Class A) units within Twickenham at the time of the Goad survey, giving a vacancy rate of 10.1% compared with the national average of 12.1%. The vacant units are dispersed through the centre. Whilst Twickenham has the highest vacancy rate of the five main centres in LBRuT, it is still below the national average and is performing satisfactorily.

Retail Rents

The relative performance of and influence of retail centres can be demonstrated by reviewing the commercial property values, for example zone A rental levels achieved for rental property.

Twickenham town centre has the second highest Zone A retail rents in the Borough, after Richmond town centre. The highest Zone A rents are around £750 per sq.m, which are achieved in King Street (source VOA). Within Church Street Zone A rents are lower at £450 to £500 per sq.m.

Stakeholders Comments

- Retail units are too small to attract key comparison retailers. This limits what the centre can offer in retail terms.
- Several people noted that this centre competes with Richmond and Kingston town centres and so will always struggle in terms of comparison shops.
- Should focus more on offering a “village” retail offer.
- Centre could do with more comparison shops. In particular, the centre needs more female clothing shops- females drive shopping demand.
- The High Street is not very upmarket.

- Some businesses make an effort with their frontages and this is important to providing a nice environment.
- Location of bus stops on narrow streets means a lot of rubbish and people loitering; this detracts from the overall appearance of the centre.
- Too many charity shops and in prime locations within the town centre. There is a risk that charity shops are pushing up rents for other retailers.
- The centre would benefit from more tree planting.
- The centre has a good provision of convenience stores- no need for any additional stores, especially small convenience stores in the centre.
- The centre has plenty of restaurants and cafes.
- Need business incentives to attract retailers. The small business relief fund has been very positive and the centre needs more incentives like this.
- The centre would benefit from a further anchor retailer in addition to Waitrose.
- The “poor cousin” of other centres in the borough.
- Trains station offers good accessibility.
- Too many small food stores- worry that they are opening up as glorified off licenses.
- Auction House in Twickenham has been a welcome attraction.
- Twickenham needs to promote itself as a family destination. More than just a local service centre. Needs to encourage it as a destination to promote brows-ability.
- Many retailers coming to the centre don’t have a strong business plan and end up vacating very shortly after.
- Negative connotations of the centre associated with Rugby and Charity Shops. Needs to change its image. Image problem.
- The centre needs to attract better brands.
- Footfall in Church St is declining; the centre is not very well connected. As a result many shops are closing.
- Needs to improve its evening, entertainment, economy i.e. night clubs and cinemas.

Twickenham’s Strengths and Weaknesses

Strengths

- There is a strong food/drink offer and evening economy, reflecting the centre’s close proximity to Twickenham Stadium.
- There is a good provision of convenience retailing within the centre, with Waitrose, Morrisons Local and Tesco Express stores.

- Recent investment to the paving in parts of Twickenham has enhanced the environmental quality of the town centre.
- The vacancy rate is lower than the national average.
- Shop property values are reasonably high, which suggests development should be viable in Twickenham.
- Church Street has a strong character which provides an attractive destination within the centre.

Weaknesses

- The centre has a relatively limited range of national multiple comparison shops for a centre of its size.
- The centre is focused around three main roads. Heavy traffic flows detract from the shopping environment and can inhibit pedestrian movement.

C. East Sheen

East Sheen is defined as a District Centre within the Core Strategy (2009), located to the east of the borough. It is a linear centre with the majority of units fronting onto Upper Richmond Road. The key roles of East Sheen include:

- **Convenience shopping:** Waitrose and a Tesco express provide convenience provision for both main food and top up shopping. These are supported by a small selection of butchers, delicatessens, a baker, an off license and newsagents.
- **Comparison shopping:** the centre comprises a good mix of comparison retailers, including both independent and national multiple retailers.
- **Services:** provides good choice and range of services including estate agents, High Street banks, hairdressers, beauty salons, cafes, restaurants and dry cleaners;
- **Entertainment:** a number of public houses are located throughout the centre;
- **Community facilities:** medical surgeries, community centre, community centre and a library.

Mix of Uses and Occupier Representatio**n**

East Sheen has a total of 215 retail/service uses. The diversity of uses present in East Sheen in terms of the number of units is set out in Table C.1, compared against the national average.

Table C.1 East Sheen Use Class Mix by Unit

Type of Unit	Units 2014	% of Total Number of Units	
		East Sheen%	UK Average (1)
Comparison Retail	82	38.1	36.0
Convenience Retail	18	8.4	8.1
A1 Services (2)	40	18.6	14.1
A2 Services	19	8.8	12.1
A3/A5	32	14.9	14.7
A4 pubs/bar	5	2.4	2.9
Vacant (3)	19	8.8	12.1
Sub-Total	**215**	**100.0**	**100.0**

Source: Goad Plans May 2013 and NLP 2014.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) incl. Class A vacant units.

The centre's mix of units is broadly similar to the national average although in terms of service units it has a higher proportion of A1 service uses and a lower proportion of A2, A3 and A5 uses. The vacancy rate of this centre is lower than the national average, which reflects a vital and viable centre.

Retailer Representation

East Sheen has a good selection of comparison shops (82). Table C.2 provides a breakdown of comparison shop units by category.

Table C.2 East Sheen Breakdown of Comparison Units

Type of Unit	East Sheen		% UK Average*
	Units	%	
Clothing and footwear	12	14.6	25.0
Furniture, carpets and textiles	14	17.1	7.4
Booksellers, arts, crafts and stationers	9	11.0	10.6
Electrical, gas, music and photography	6	7.3	9.4
DIY, hardware and homewares	8	9.8	6.4
China, glass, gifts and fancy goods	3	3.7	4.6
Cars, motorcycles and motor access	2	2.4	1.3
Chemists, drug stores and opticians	6	7.3	10.0
Variety, department and catalogue	1	1.2	1.6
Florists, nurserymen and seedsmen	3	3.7	2.3
Toys, hobby, cycle and sport	6	7.3	5.2
Jewellers	1	1.2	5.0
Charity / Second-hand	10	12.2	8.4
Other comparison retailers	1	1.2	2.9
Total	**82**	**100.0**	**100.0**

Source: Goad Plan May 2013 and NLP 2014
*UK average for all town centres surveyed by Goad Plans (March 2014)

The centre provides all of the Goad Plan comparison categories, although the choice available in certain categories is low. The choice of clothing/ footwear and furniture/carpet shops is very good.

Service Uses

East Sheen has a good range of non-retail service uses, with all categories present and mostly well represented (see Table C.3) reflecting the size of East Sheen and its service role in the shopping hierarchy. The proportion of restaurants and cafes is lower than the national average.

Table C.3 East Sheen Analysis of Selected Service Uses

Type of Unit	East Sheen		% UK Average*
	Units	%	
Restaurants/cafes	23	26.7	23.3
Fast food/takeaways	9	10.5	15.2
Pubs/bars	5	5.8	7.6
Banks/other financial services	6	7.0	12.9
Betting shops/casinos	2	2.3	4.0
Estate agents/valuers	11	12.8	9.5
Travel agents	1	1.2	2.5
Hairdressers/beauty parlours	22	25.6	22.9
Laundries/dry cleaners	7	8.1	2.2
Sub Total	**86**	**100.0**	**100.0**
Other A1 Service Units	10	n/a	n/a
Overall Total	**96**	**n/a**	**n/a**

Source: Goad Plan May 2013 and NLP 2014
*UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were 19 vacant retail (Class A) units within East Sheen at the time of NLP's survey, giving a vacancy rate of around 9.0%, below the national average of 12.1%. The vacant units are dispersed through the centre.

Retail Rents

The relative performance of and influence of retail centres can be demonstrated by reviewing the commercial property values, for example zone A rental levels achieved for rental property.

East Sheen town centre has the third highest Zone A retail rents in the Borough, after Richmond and Twickenham. The highest Zone A rents are around £650 per sq.m (source VOA), which are achieved in the central section of Upper Richmond Road West. Within the other parts of Upper Richmond Road West Zone A rents range from £330 to £550 per sq.m.

Stakeholders Comments

- Acts like a little village, despite being on a main road.
- Too many estate agents which "dominate the centre".
- Very attractive and presentable centre.
- Low number of vacant units, and when units become vacant they remain vacant for a very short period of time.
- Lack of car parking is a key concern. Only car parks are associated with the Waitrose and Doctors surgery.
- East Sheen is a "lovely" place to visit.

East Sheen's Strengths and Weaknesses

Strengths

- There is a good provision of convenience retailing within the centre, with Morrisons, Waitrose and Co-op. These stores cater for both main and top up food shopping.
- The centre has a good range of independent comparison shops and services that meet the day to day needs of residents.
- The vacancy rate is lower than the national average.

Weaknesses

- The centre is located along a linear road and heavy traffic can be a barrier to pedestrian movement.

D. Teddington

Teddington is a defined District Centre (Core Strategy 2009) and is located to the south of the borough.

The key roles of Teddington include:

- **Convenience shopping:** Marks & Spencer Simply Food, Morrisons, Tesco Metro and Budgens provide convenience provision the main convenience provision, targeted more for top up shopping. These are supported by a small selection of bakers, health food store, delicatessens, newsagents and an off license.
- **Comparison shopping:** the centre predominantly comprises independent retailers located along the High street and Broad Street.
- **Services:** provides a good range and choice of services including high street banks, estate agents, hairdressers, cafes, restaurants, pubs and takeaways;
- **Entertainments:** a number of public houses are located throughout the centre;
- **Community facilities:** medical surgeries, hotels and a health club.

Mix of Uses and Occupier Representation

Teddington has a total of 180 retail/service uses. The diversity of uses present in Teddington in terms of the number of units is set out in Table D.1, compared against the national average. The figures within this table relate to the Goad town centre area which is slightly larger than the Council's designated town centre area.

Table D.1 Teddington Use Class Mix by Unit

Type of Unit		% of Total Number of Units	
		Teddington%	UK Average [1]
Comparison Retail	64	35.6	36.0
Convenience Retail	17	9.4	8.1
A1 Services [2]	35	19.4	14.1
A2 Services	20	11.1	12.1
A3/A5	29	16.1	14.7
A4 pubs/bar	7	3.9	2.9
Vacant [3]	8	4.4	12.1
Sub-Total	**180**	**100.0**	**100.0**

Source: Goad Plans June 2013 and NLP 2014.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) incl. Class A vacant units.

The centre's mix of units is broadly similar to the national average although it has a higher proportion of A1 service units. The vacancy rate of this centre is much lower than the national average, which reflects a vital and viable centre.

Retailer Representation

Teddington has a fair selection of comparison shops (39) when compared with other centres in the District, reflecting its role in the retail hierarchy as a primarily service centre. Table D.2 provides a breakdown of comparison shop units by category.

Table D.2 Teddington Breakdown of Comparison Units

Type of Unit	Teddington		% UK Average*
	Units	%	
Clothing and footwear	13	20.3	25.0
Furniture, carpets and textiles	9	14.1	7.4
Booksellers, arts, crafts and stationers	6	9.4	10.6
Electrical, gas, music and photography	0	0	9.4
DIY, hardware and homewares	7	10.9	6.4
China, glass, gifts and fancy goods	4	6.3	4.6
Cars, motorcycles and motor access	0	0	1.3
Chemists, drug stores and opticians	6	9.4	10.0
Variety, department and catalogue	0	0	1.6
Florists, nurserymen and seedsmen	1	1.5	2.3
Toys, hobby, cycle and sport	2	3.1	5.2
Jewellers	3	4.7	5.0
Charity Shops/Second-hand	11	17.2	8.4
Other comparison retailers	2	3.1	2.9
Total	**64**	**100.00**	**100.00**

Source: Goad Plan June 2013
*UK average for all town centres surveyed by Goad Plans (March 2014)

The centre does not provide all of the Goad Plan comparison categories but there is a good choice of clothing and footwear shops, charity shops and furniture/carpet shops. The comparison retailers within Teddington are primarily independent retailers.

Service Uses

Teddington has a good range of non-retail service uses, with all categories present and well represented (see Table D.3), except for Travel Agents, reflecting the size of Teddington and its service role in the shopping hierarchy. The proportions of restaurants/cafes and pubs/bars are higher than the national average, suggesting the centre has a strong food and drink and evening economy.

Table D.3 Teddington Analysis of Selected Service Uses

Type of Unit	Teddington		% UK Average*
	Units	%	
Restaurants/cafés	24	29.3	23.3
Fast food/ Takeaways	5	6.1	15.2
Pubs/ Bars	7	8.5	7.6
Banks/other financial services	9	10.9	12.9
Betting shops/ casinos	2	2.4	4.0
Estate agents/valuers	9	11.0	9.5
Travel agents	0	0	2.5
Hairdressers/beauty parlours	22	26.8	22.9
Laundries/dry cleaners	4	4.9	2.2
Sub-Total	**82**	**100.00**	**100.00**
Other A1 Services	9	n/a	n/a
Total	**91**	**n/a**	**n/a**

Source: Goad Plan June 2013
*UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were 8 vacant retail units within Teddington at the time of the Goad survey, giving a vacancy rate of 4.1%, significantly below the national average of 12.1%. The vacant units are dispersed through the centre.

Retail Rents

The relative performance of and influence of retail centres can be demonstrated by reviewing the commercial property values, for example zone A rental levels achieved for rental property.

Teddington town centre achieves Zone A retail rents slightly lower than East Sheen the Borough. The highest Zone A rents are around £600 per sq.m (source VOA), which are achieved in the High Street.

Stakeholders Comments

- Teddington is a thriving retail centre and vacancy rates are currently lower than suggested in our draft report.
- The town centre benefits from not being dominated by multiple retailers and is therefore not a “clone” of some other town centres. Instead there is a good mix of independent retailers offering a variety of goods.
- There is a good evening economy offer with a number of pubs and good quality restaurants in the area.
- Car parking is relatively good with metered parking in the High Street and Broad Street and also Tesco car park. Residents can also benefit from 30 minutes free parking if they register for a Richmond Card.

- There is a good business community with groups such as Teddington Business Community and The Teddington Society which support local businesses. Teddington also benefits from being close to attractive leisure areas such as Bushy Park and the River Thames.
- There is a very definitive split between the Broad Street and the High Street and at present premium rents are being achieved in the High Street with the Broad Street not being so attractive to good quality independent retailers. The Broad Street has therefore become a hub for charity shops which will also deter quality retailers from locating there. The Causeway also struggles to compete with the two main shopping areas and in particular there has been a very large empty unit in The Causeway which is contributing to this being a poor shopping area.
- It may be beneficial for The Causeway to become pedestrianised and made a more attractive area with the addition of seating and landscaping which would then encourage retailers or coffee shops to locate here. This could then also become an attractive area for evening trade with potential restaurants being able to have outdoor seating.

Teddington's Strengths and Weaknesses

Strengths

- There is a good provision of convenience retailing within the centre, with Morrisons, Marks & Spencer Simply Food and Tesco Metro. These stores cater primary for top up food shopping.
- The centre has a good range of independent comparison shops and services that meet the day to day needs of residents.
- The vacancy rate is lower than the national average.

Weaknesses

- The centre are a limited choice of national multiple comparison shops.
- There is no large food store within the centre to cater for main food shopping trips.

E. Whitton

Whitton is the smallest of the District Centres within LBRuT and is located to the north of the borough.

The key roles of Whitton include:

- **Convenience shopping:** Lidl, Tesco Metro and Iceland offer the main convenience provision in the centre. These are supported by a small selection of bakers, grocers and a newsagent.
- **Comparison shopping:** the centre predominantly comprises independent retailers located along the High Street.
- **Services:** provides a good range and choice of services including high street banks, estate agents, hairdressers, cafes, restaurants, pubs and takeaways;
- **Entertainments:** one public house is located within the centre.
- **Community facilities:** medical surgeries and a library.

Mix of Uses and Occupier Representation

Whitton has a total of 112 retail/service uses. The diversity of uses present in Whitton in terms of the number of units is set out in Table E.1, compared against the national average.

Table E.1 Whitton Use Class Mix by Unit

Type of Unit	Units 2014	% of Total Number of Units	
		Whitton %	UK Average (1)
Comparison Retail	35	31.3	36.0
Convenience Retail	15	13.4	8.1
A1 Services (2)	24	21.4	14.1
A2 Services	12	10.7	12.1
A3/A5	16	14.3	14.7
A4 pubs/bar	1	0.9	2.9
Vacant (3)	9	8.0	12.1
Total	**112**	**100.0**	**100.0**

Source: Goad Plans May 2013 and NLP 2014.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) incl. Class A vacant units.

The centre's mix of units is broadly similar to the national average although it has a slightly higher proportion of convenience and A1 Service units. The vacancy rate of this centre is much lower than the national average at 8%, which reflects a vital and viable centre.

Retailer Representation

Whitton has a fair selection of comparison shops (35) when compared with other centres in the District, reflecting its role in the retail hierarchy in the

District as a service/ convenience centre. Table E.2 provides a breakdown of comparison shop units by category.

Table B.2 Whitton Breakdown of Comparison Units

Type of Unit	Whitton		% UK Average*
	Units	%	
Clothing and footwear	3	8.5	25.0
Furniture, carpets and textiles	2	5.7	7.4
Booksellers, arts, crafts and stationers	2	5.7	10.6
Electrical, gas, music and photography	1	2.9	9.4
DIY, hardware and homewares	4	11.4	6.4
China, glass, gifts and fancy goods	0	0	4.6
Cars, motorcycles and motor access	2	5.7	1.3
Chemists, drug stores and opticians	7	20	10.0
Variety, department and catalogue	0	0	1.6
Florists, nurserymen and seedsmen	1	2.9	2.3
Toys, hobby, cycle and sport	1	2.9	5.2
Jewellers	1	2.9	5.0
Charity shops/second-hand	8	22.9	8.4
Other comparison retailers	3	8.5	2.9
Total	**35**	**100.00**	**100.00**

Source: Goad Plan May 2013
*UK average for all town centres surveyed by Goad Plans (March 2014)

The centre provides most of the Goad Plan comparison. The range within the other categories is reasonable given the centres' size and we note there is a good choice of chemist/optician stores.

Service Uses

Whitton has a good range of non-retail service uses, with all categories present and mostly well represented (see Table E.3) reflecting the size of Whitton and its service role in the shopping hierarchy. There is a good selection of restaurants and cafés, however there is only one pub which is below the national average for a centre if this size. The number of betting shops is in line with the national average.

Table E.3 Whitton Analysis of Selected Service Uses

Type of Unit	Whitton		% UK Average*
	Units	%	
Restaurants/cafes	12	24.0	23.3
Fast food/takeaway	4	8.0	15.2
Pubs/bars	1	2.0	7.6
Banks/other financial services	5	10.0	12.9
Betting shops/casinos	2	4.0	4.0
Estate agents/valuers	5	10.0	9.5
Travel agents	1	2.0	2.5
Hairdressers/beauty parlours	17	34.0	22.9
Laundries/dry cleaners	3	6.0	2.2
Total	**50**	**100.00**	**100.00**
Other	3	n/a	n/a
Total	**53**	**n/a**	**n/a**

Source: Goad Plan May 2013
*UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were 9 vacant retail units within Whitton at the time of the Goad survey, giving a vacancy rate of 8%, significantly below the national average of 12.1%. The vacant units are dispersed through the centre.

Retail Rents

The relative performance of and influence of retail centres can be demonstrated by reviewing the commercial property values, for example zone A rental levels achieved for rental property.

Whitton achieves the lowest Zone A retail rents when compared with the four other main centres reflecting its more localised role. The highest Zone A rents are £350 per sq.m (source VOA).

Stakeholders Comments

- Whitton town centre is improving and “on the way up”.
- Whitton still has a genuine community feel which many fear has been lost in other parts of London.
- Of the many resident surveys we have undertaken in Whitton, residents say 'their High Street' represents the heart of the community which is probably why the two Annual events in the High Street are so popular amongst all age groups.
- Residents and visitors coming in to the shops, cafés and restaurants say it is the genuinely friendly and personal service which makes it such a great place to shop and enjoy.
- With the recent upgrading of the pavements and shop fronts and the planned mainline station improvements it just gets better.

- The occupancy rate in the High Street and surrounding shops is even higher than that stated in the report (May 2013) and if we could just get more residents to use the High Street shops rather than outer supermarkets, then things will get even better.
- Another factor which would help many more local people from the outer part of Whitton come into the town centre is adding a new bus stop for the 110 bus route which is near to the High Street, so the many residents in that area dependent upon public transport could get here without having to change buses!

Whitton's Strengths and Weaknesses

Strengths

- Whitton serves the day to day service and shopping needs of local residents.
- There is a good selection of convenience shops and service uses.
- The vacancy rate is lower than the national average.
- Wide pavements and good quality pedestrian crossings create a pedestrian friendly environment.

Weaknesses

- The centre is the smallest of the five main centres in the Borough and there is a limited choice of comparison shops, particularly national multiple comparison shops.

Stakeholder Comments Barnes

- Low footfall which means attracting retailers and business to the town centre is difficult. Low footfall also means there is little interest from National Multiple Retailers for units within the centre.
- High rents push out independent retailers; those who can operate more successfully with low footfall which causes a difficult town centre environment to attract business.
- Some change to this with the opening of “Gail’s Artisan Bakery”; this is attracting more footfall.
- The Barnes Community Association is trying to attract business through marketing campaigns. This includes a “Residents’ responsibility to shops” scheme; to attract residents to shop more locally. Also trying to market the centre to visitors from outside i.e. from Hammersmith and Putney, through introduction of Boris bikes/ events.
- BCA is also speaking with landlords to seek to ensure rents can attract the type of businesses the centre needs.
- The environment is ok although more needs to be done to support pedestrian movement throughout the centre. Speed measures are being introduced accordingly.
- Barnes is a village on the river, but with very little pedestrian/ vehicular access to the river. It would be good for this to change.

Stakeholder Comments St Margaret’s

- The centre benefits from a Village feel which is a strong attraction to for nearby residents.
- Concern over national multiple retailers pushing out independent businesses due to an “aggressive” pricing structure. However, it is also recognised that such retailers drive footfall.
- Vacant units is a big concern, although the centre has a lower vacancy rate that other centres.
- Has a good provision of local service uses to meet the local shopping needs i.e. baker, butcher, newsagent.
- Increased interest from pop up shops to use vacant units temporarily.
- Worried about increase in estate agents; this will detract from the centre’s village feel.

List of Stakeholders Contacted

1. Whole Foods, Richmond
2. Whitton Business Association (Whitton Town Centre Manager, Bridget Clements)
3. Snellers Commercial
4. Waitrose

5 Twickenham Business Improvement District

6 Barnes Community Association

7 Richmond and Twickenham Business and Retail Association

8 Best of Richmond

9 Lovers Lights Gallery, Twickenham

10 St Margaret's Traders Association.

Appendix 6 Household Survey Results

Household Survey Results

Survey Structure

NEMS Market Research carried out a telephone survey of 1,000 households across the LBRuT study area in March 2014. The study area was split into seven zones, based on ward boundaries.

The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

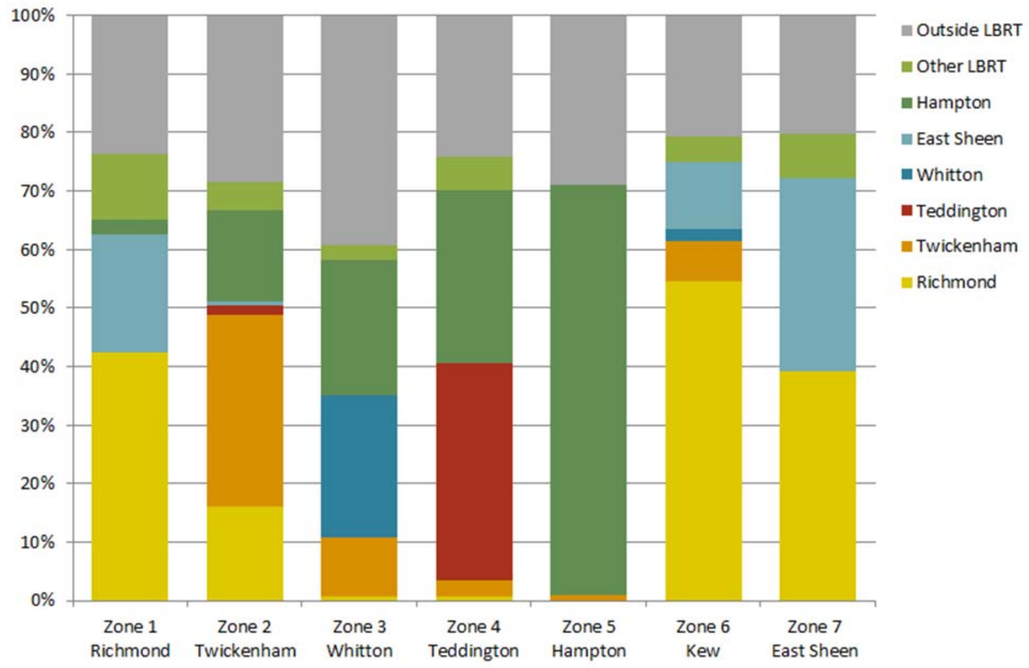
- Main food and top up grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items; and
  - other non-food items (e.g. books, CDs, DVDs, toys and gifts).

Main Food Shopping

Large food stores are the primary destination for main food shopping trips across the study area. Overall, the Sainsbury's store on Lower Richmond Road was the most popular shopping destination for the study area as a whole (9.7%), followed by the Sainsbury's in Hampton (9.4%), Tesco in Isleworth (8.6%) and Waitrose in Richmond (8.3%). The internet was used by 8.7% of respondents. The market share of main food shopping for each town centre is shown in the graph below.

Richmond and Hampton all have high market shares (over 40%) of main food shopping within their local zones (Zones 1 and 5). Hampton attracts the highest number of main food shopping trips within its zone (70%, Zone 5), with Richmond attracting 42.4% (Zone 1).

Figure A Main Food Shopping



Source: NEMS Household Survey March 2014

Mode of Travel for Main Food Shopping

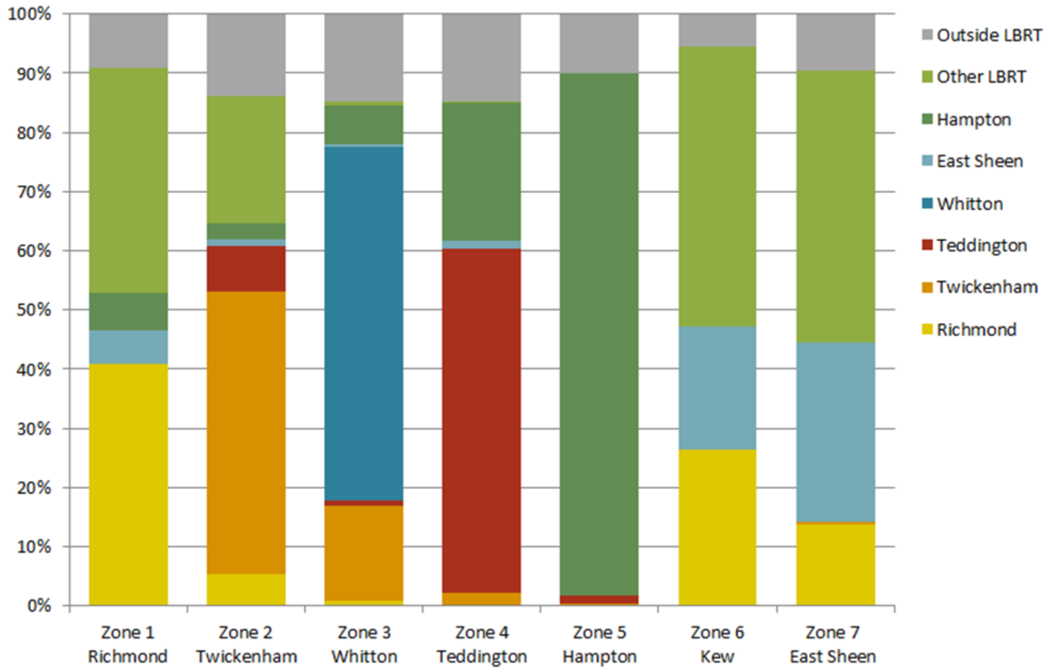
In the whole study area, 61.7% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is lower than the NLP average derived from similar surveys across the country (74.6%). This is typical for a London Borough. A higher proportion walk to their main food shopping destination (18.6%) compared to the NLP average of 11.7%. A similar proportion of households travel by bus (8.8%) compared to the NLP averages derived from other surveys of 8.6%. 1.7% cycle to do their main food shopping.

Top-Up Food Shopping

Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Around 89% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips. The market share of top-up food shopping for each town is shown in the graph below.

Zones 1 to 5 all retain fairly high top up shopping trips within their main centres. Hampton attracts 88.2% of trips (Zone 5), Whitton 59.8% (Zone 3), Teddington 58.2% (Zone 4), Twickenham 47.7% (Zone 2) and Richmond 40.9% (Zone 1).

Figure B Top Up Food Shopping



Source: NEMS Household Survey March 2014

Non-Food Shopping

Respondents were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, Kingston town centre was the most popular destination with 39% of all respondents shopping there, followed by Richmond (20.7%). 4.5% do most of their non-food shopping in Twickenham and 3.9% in Central London. This demonstrates that the majority of non-food shopping is carried out outside the District.

Overall 4% of respondents buy most of their non-food shopping on the internet or have it delivered. The Richmond town centre zone has the highest proportion of respondents who buy most of their non-food shopping on the internet/by mail order (6.1%), followed by the East Sheen zone (6%) and the Hampton Zone (5.8%). The Kew zone undertakes the lowest proportion of non-food shopping on the internet/by mail order (1.6%).

Mode of Travel for Non-Food Shopping

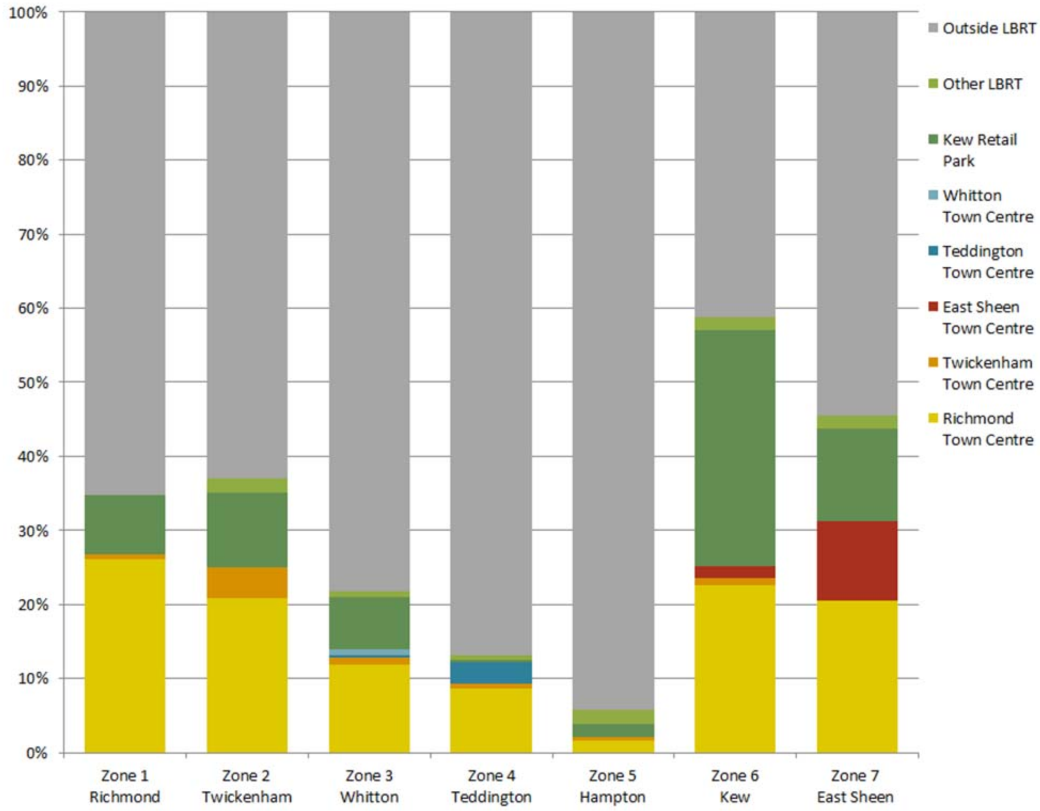
The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 45% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was by bus/coach (21.2%) followed by walking (16.4%).

Non-Food Shopping Destinations

The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping.

The market share for each non-food goods category within each town in the London Borough of Richmond is shown in the graphs below and overleaf.

Figure C Clothing and Shoes



Source: NEMS Household Survey March 2014

Figure D Domestic Electrical Appliances

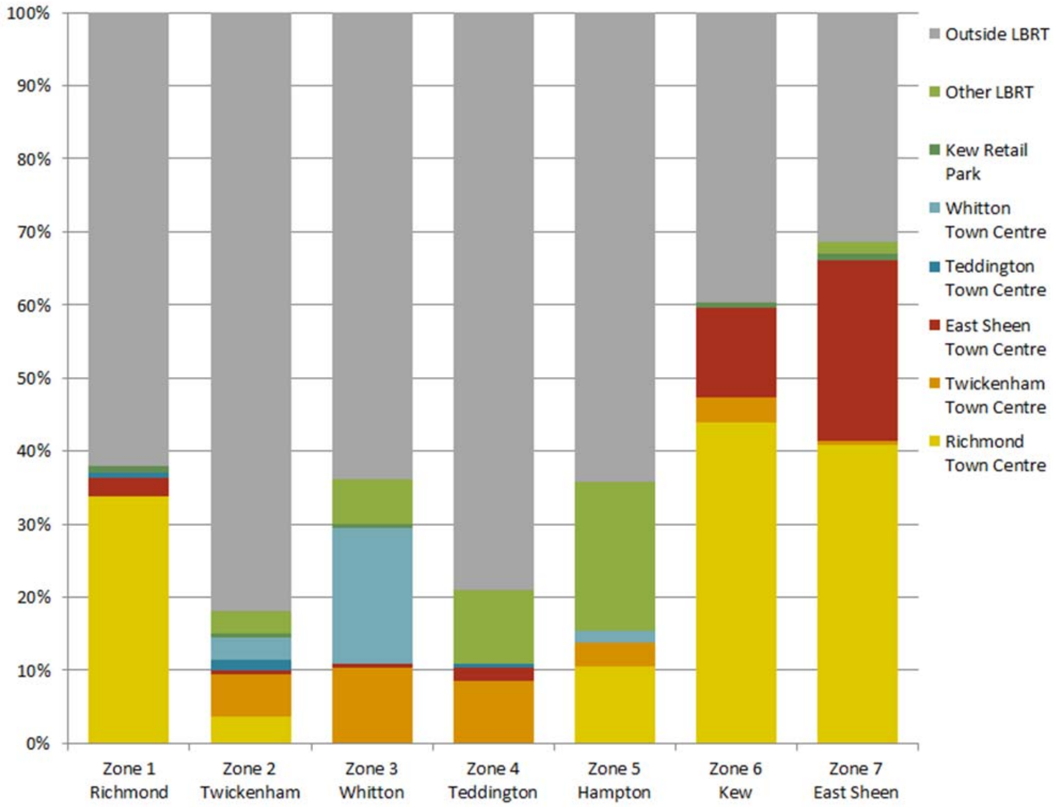
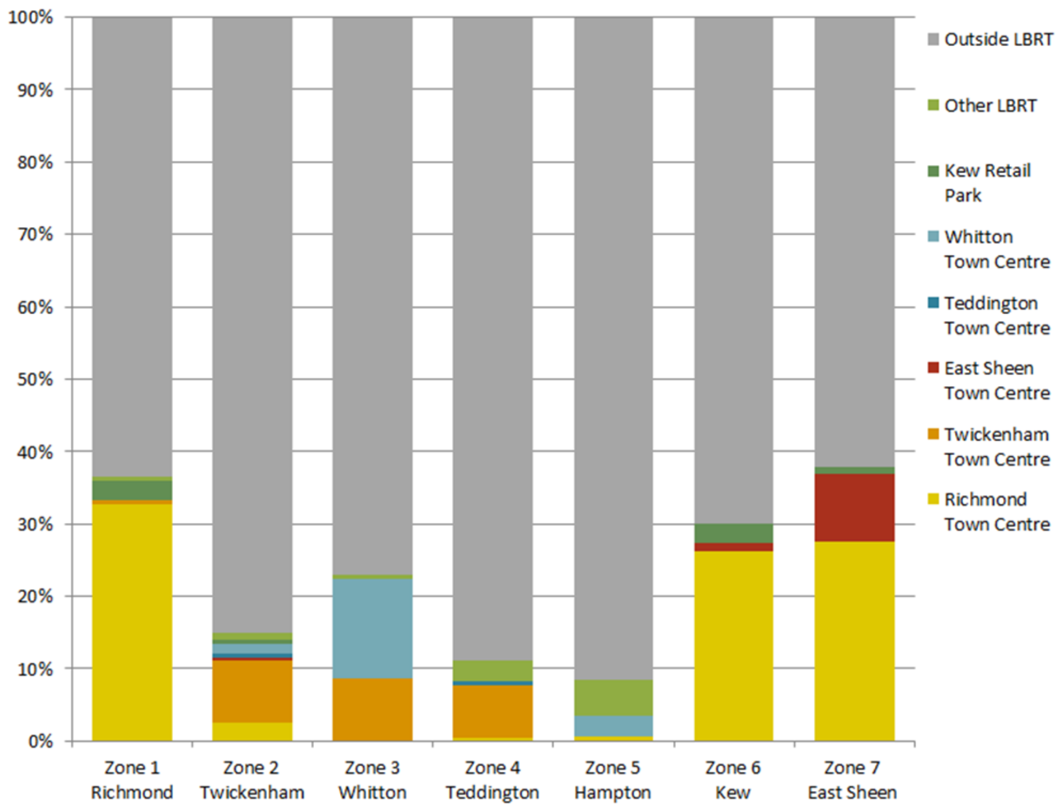


Figure E Other Electrical Goods



Source: NEMS Household Survey March 2014

Figure F Furniture, Soft Furnishings and Floor Coverings

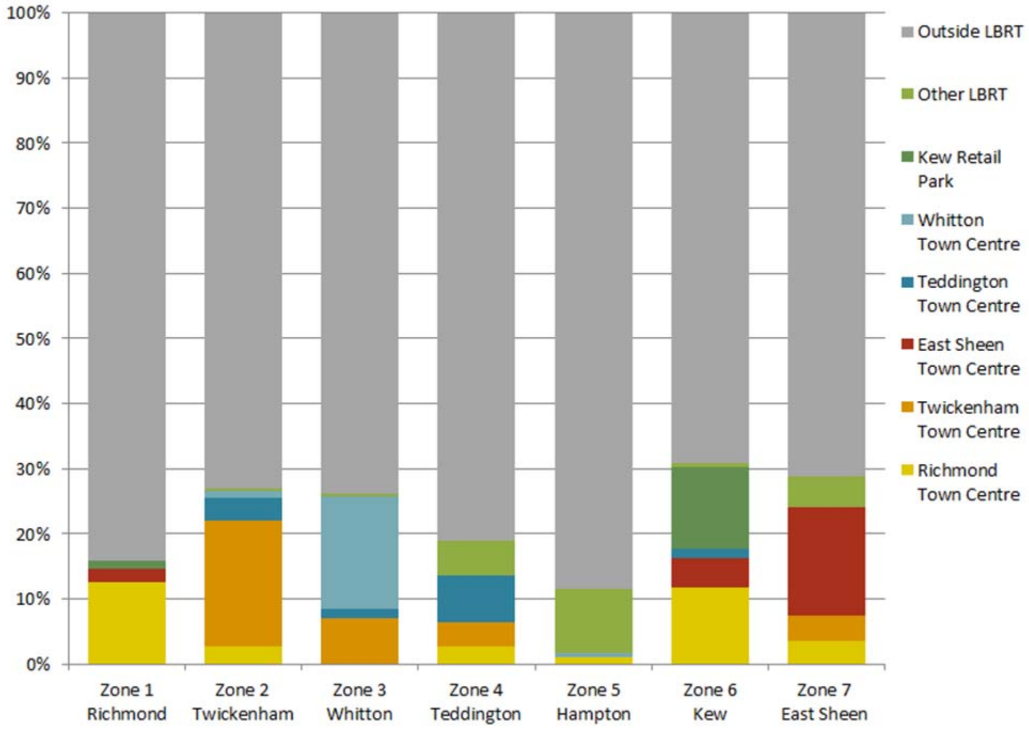
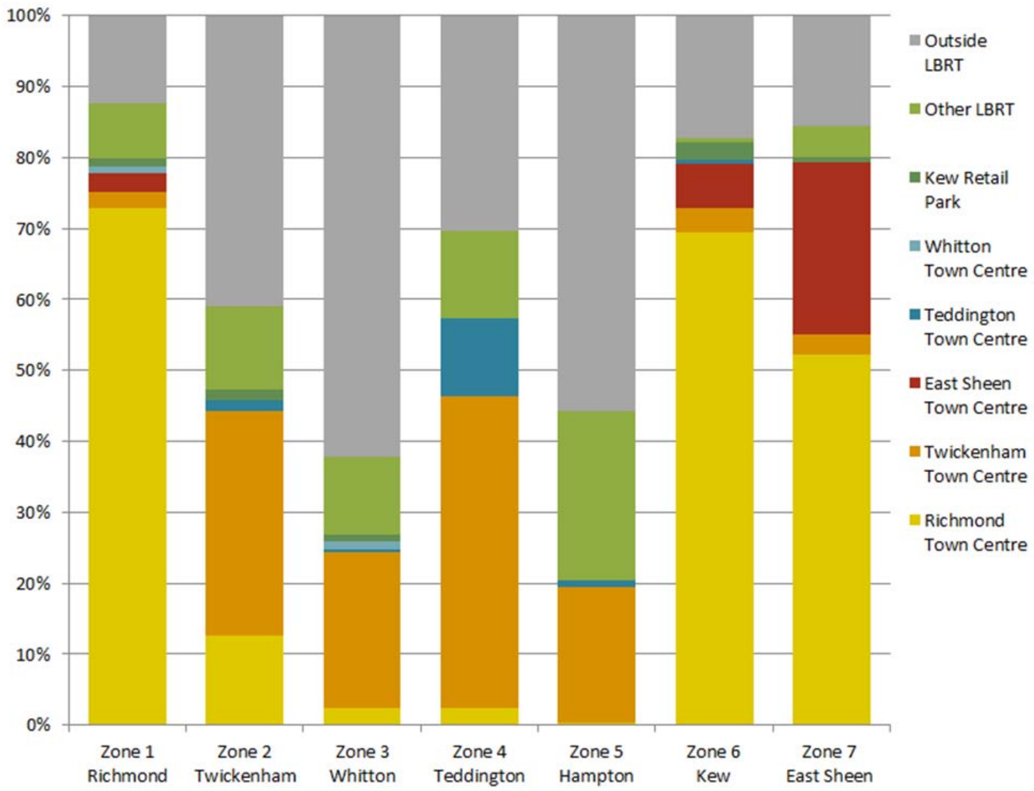


Figure G DIY, Hardware and Garden Items



Source: NEMS Household Survey March 2014

Figure H Health, Beauty and Chemist

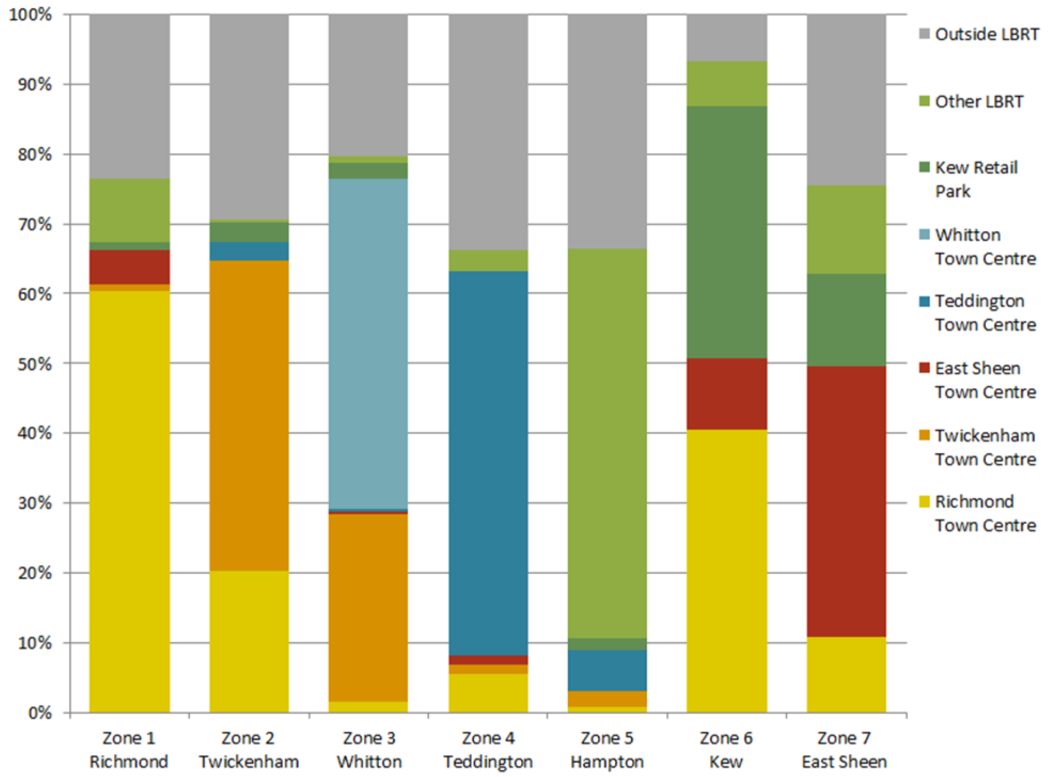
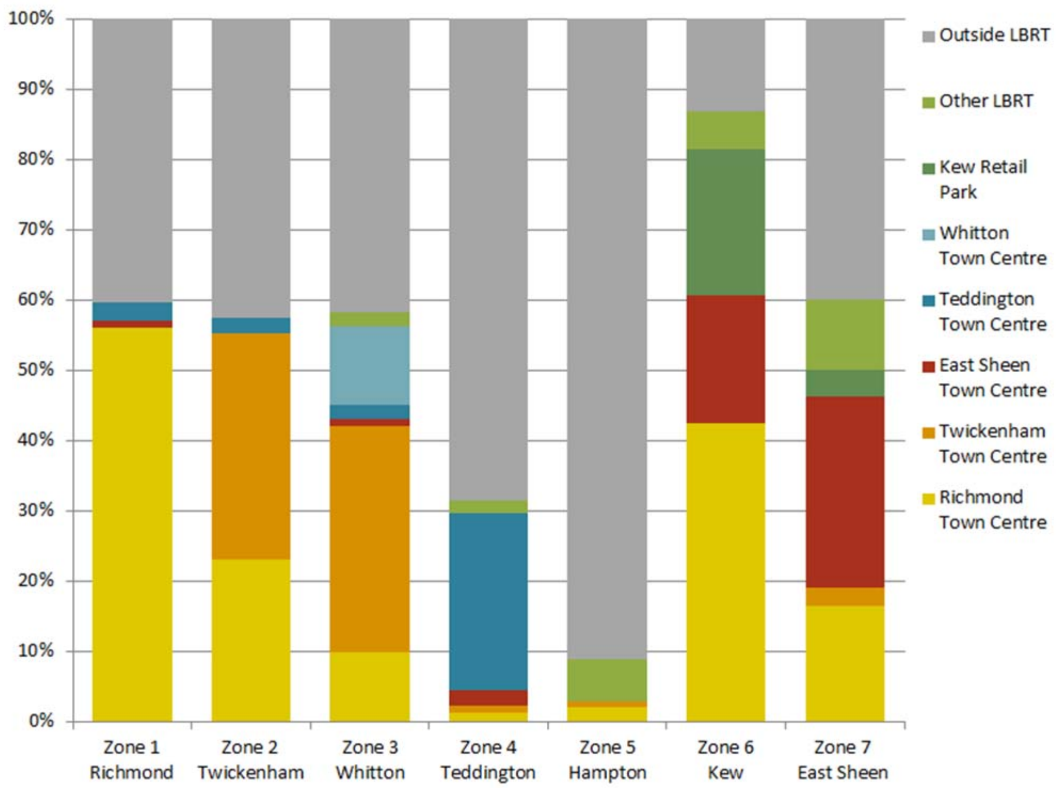


Figure I Books, CDs, Toys and Gifts



Source: NEMS Household Survey March 2014

Internet Shopping

Respondents were asked what goods they regularly buy on the internet. Around 23% stated that they did not regularly buy items on the internet. The most popular response was books and CDs (57.4%), clothes and shoes (24.9%) and electrical goods (13.4%). 9.3% regularly bought groceries via the internet.

Shoppers' Views

The household survey asked respondents what would make them visit the main centres more often.

- **Richmond Town Centre**: Over a third responded that nothing would make them visit Richmond town centre more often (36.4%). 18.2% responded a better choice in shops and a further 7.5% responded better quality shops. 18.2% said more or better car parking would make them visit the town more often whilst 13.3% responded free car parking. Only 3.1% responded that they did not visit Richmond town centre.
- **Twickenham Town Centre**: Around 36% said nothing would make them visit Twickenham town centre more often and 22.4% replied that they did not visit Twickenham town centre at all. Of the remaining respondents, 18.5% replied having a better choice of shops in general, whilst 7.5% specifically replied a better choice in clothes shops. 6.3% responded having better quality shops. 8.5% replied having more car parking would make them visit Twickenham town centre more often.
- **East Sheen District Centre**: Just under 40% said nothing would make them visit East Sheen more often (38.5%). 6% replied a better choice in shops in general and 2.6% replied better car parking.
- **Teddington District Centre**: Just over half (50.2%) responded that nothing would make them visit Teddington more often. A further 30.8% responded that they did not visit Teddington at all. Of the remaining respondents, 5.4% replied a better choice in shops, 3.5% specifically a better choice in clothing shops. 6% would like more car parking and 3.2% free car parking.
- **Whitton District Centre**: Just over a third responded that nothing would make them visit Whitton town centre more often (35.5%) and just under half said they did not visit Whitton (48.4%). Of the remaining respondents 6.3% would like to see a better choice of shops in general, 3.2% a better choice of clothing shops and 2.0% better quality shops.

Evening Economy

Pubs/ Bars

The household survey asked respondents if and where they or their family last visited a pub/bar. 77.5% of respondents indicated that they visited pubs/bars. This is higher than the NLP average from other surveys (47.5%) Overall, Richmond town centre (18.5%), Teddington (12%) and Twickenham (11.3%) were the most popular destinations. However, most people generally tended to visit pubs and bars according with the closest main centre within each zone. For example, out of the 18.5% of people who visited a pub/bar in Richmond town centre, 26% came from the Richmond town centre Zone (Zone 1). 5.1% indicated that they normally visit pubs/bars in central London.

Restaurants

Overall 92.4% of respondents indicated they visit restaurants and this is higher than the NLP average for other surveys (67.9%). Of all the respondents who visited restaurants, Richmond town centre attracted the highest proportion of respondents (25.7%) followed by Teddington (14.8%) and Twickenham (10.5%). 8.8% responded that they normally visit restaurants in central London.

Visitors' Views on Evening Economy

The household survey asked respondents what would make them visit the main centres more often in the evening.

- **Richmond**: 60% responded nothing would make them visit Richmond Town Centre more often in the evening. 5.2% considered they would visit more often is there was a better choice of restaurants and 3.5% responded a better choice in bars. 2.4% replied free car parking and 2.5% improved bus service. 3% responded less antisocial behaviour, with 1.3% considering if Richmond had better security/ police controls they may visit more often.
- **Twickenham**: 53.4% responded that nothing would make them visit Twickenham Town Centre more in the evening. 7.3% responded a better choice in restaurants and 3.7% a better choice in bars. 1.5% replied less anti-social behaviour and 1.7% said more security/ policy controls would make them visit more often.
- **Teddington:** Just under 60% replied nothing would make them visit Teddington more often. 2.5% felt a better choice bars, and a better choice of restaurants would make them visit more often. 2.7% responded better quality bars. Only 0.2% responded less anti-social behaviour. 1% considered better public transport links would make them visit more often.
- **Whitton**: 43.2% replied nothing would make them visit Whitton more often in the evening. 3.9% considered a better choice of restaurants would make them visit more, and 1.9% responded better quality restaurants. Only 0.1% replied less anti-social behaviour.
- **East Sheen**: Just under half of respondents replied that nothing would make them visit East Sheen more often (46.8%). 4.5% replied a better choice of restaurants, and 2.9% better choice of bars. 1.6% responded better quality bars would make them visit East Sheen more often, and 1.4% replied better quality restaurants. No respondents answered less anti-social behaviour.

Appendix 7 In-Street Visitor Survey

In-Street Visitor Results

Survey Structure

NEMS Market Research carried out an in-street of 500 people across the five main centres in LBRuT in April 2014. Completed interviews were as follow:

Richmond town centre	150 interviews
Twickenham	100 interviews
Teddington	100 interviews
East Sheen	75 interviews
Whitton	75 interviews

The survey covered the following issues:

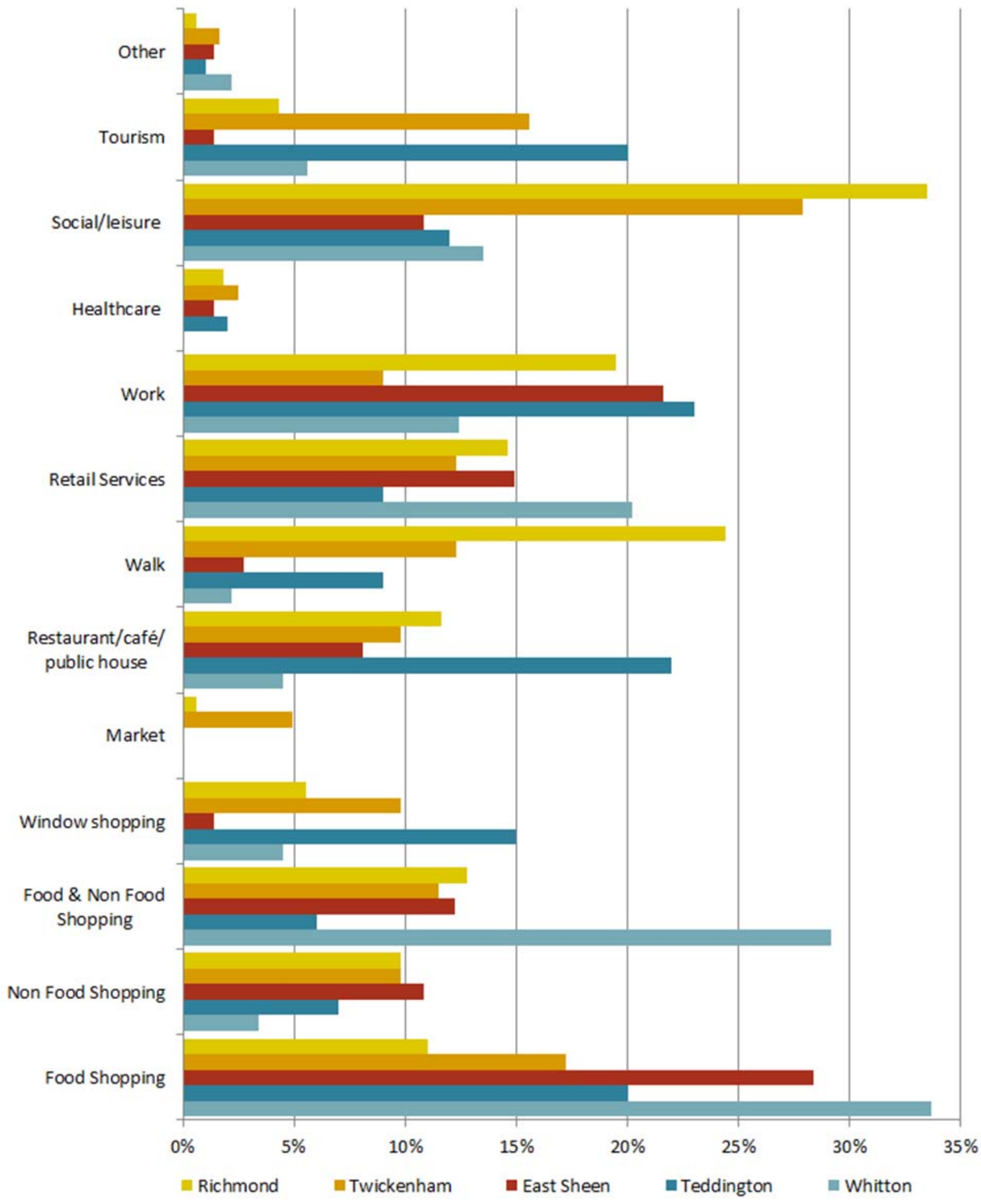
- reason for visiting the centre (i.e. shopping, work, leisure, tourism etc.);
- length of stay and expenditure;
- origin of trip and mode of travel;
- likes and dislikes about the centre;
- other competing centres usually visited;
- car parking and public transport issues;
- use of the town centre during the evenings;
- demographic and socio-economic profile; and
- desired improvements to the centre.

Main Purpose of Visit to the Centres

The in-street survey results are not directly comparable with the household survey. The in-street surveys were undertaken during the daytime and interviews were conducted in the main shopping areas and therefore the result may overstate the importance of shopping and understate other reasons for visiting the town centres.

Notwithstanding the above, the main purpose for visiting Richmond town centre (33.5%) and Twickenham District Centre (27.9%) was for social/ leisure reasons i.e. meeting friends, visiting the gym. Food shopping was the main reason for visiting both East Sheen (28.4%) and Whitton (33.7%) district centres. For Teddington the main purpose for visit was for work or business purposes (23%), closely followed by visiting a restaurant/bar. Whitton had the highest proportion of the main purpose of the visit to use services, e.g. bank, post office, hairdresser (20.2%). The results are summarised in Figure 1.

Figure 1 Main Reasons for Visit to Centre (%)

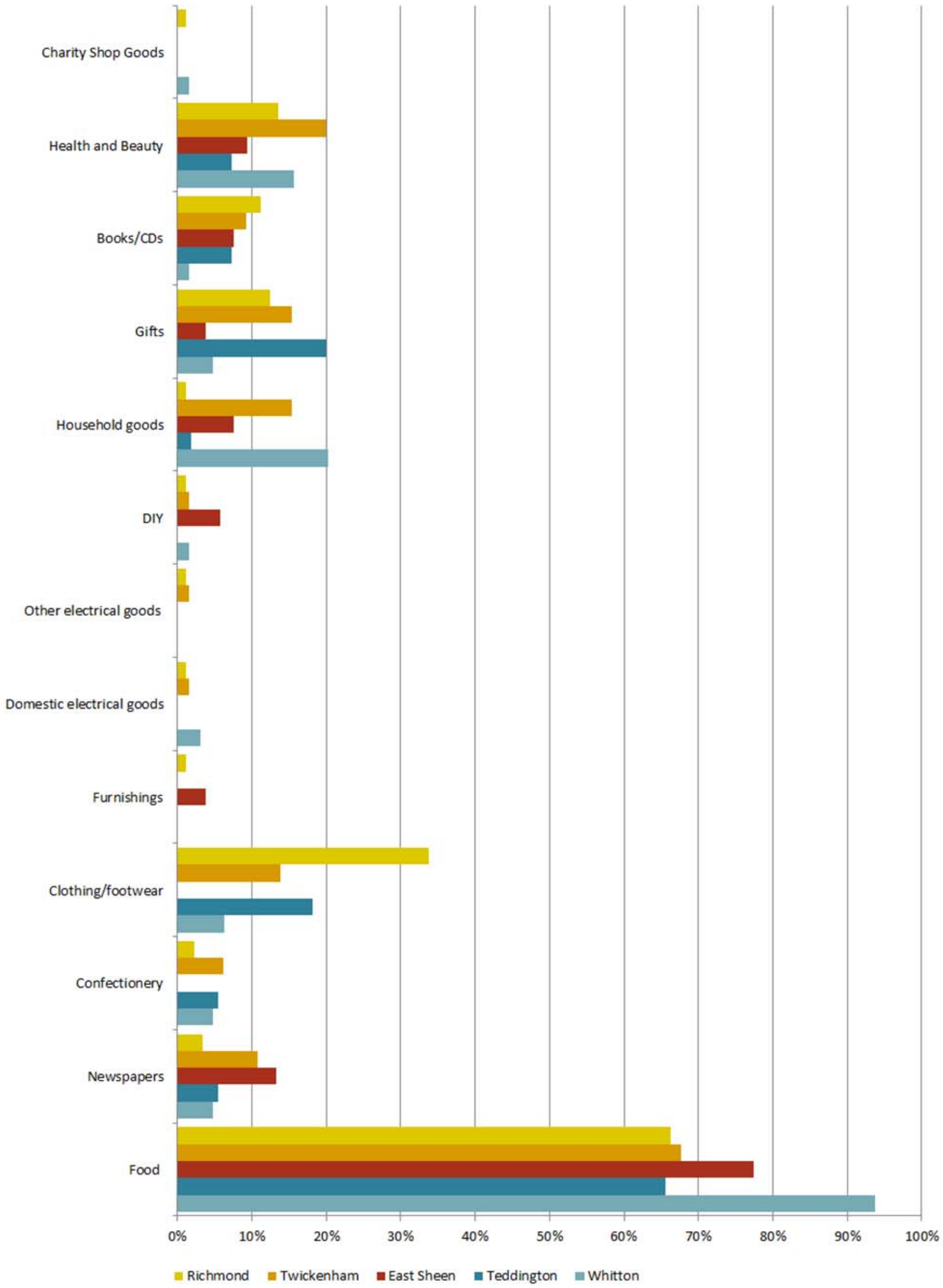


Source: Question 6, NEMS Survey April 2014
(May not sum to 100% as more than one response may be given to question)

Intended Visitor Purchases

Of those respondents who intended to purchase goods during their visit, 73.6% intended to buy food and grocery items. This figure was highest in Whitton (93.8%) and lowest in Teddington with 65.5% of respondents. The intended purchases of respondents are shown in Figure 2.

Figure 2 Intended Purchases (%)



Source: Question 8, NEMS Survey April 2014
(May not sum to 100% as more than one response may be given to question)

In all centres, most people intended to buy food and groceries. The second most popular purchase was clothing/footwear in Richmond (33.7%), health and beauty items (20.0%) in Twickenham, newspapers and magazines (13.2%) in East Sheen, gifts and jewellery items in Teddington (20%) and other household goods in Whitton (20.3%).

Expenditure during Visit

Visitors were asked to estimate how much they would spend during their visit to the centres. The results are shown in Table 1. No centre has a particularly high average food spend. The average spend on food shopping is highest in Whitton district centre (£19.06), followed by East Sheen (£18.92). Richmond has the lowest average spend for food shopping (£12.61).

Table 1 Average Food and Grocery Expenditure within the Centres £

Food and Grocery Expenditure	Average Expenditure				
	Richmond	Twickenham	East Sheen	Teddington	Whitton
Average per visitor	£12.61	£14.92	£18.92	£15.28	£19.06

Source: Question 9, NEMS Survey April 2014

The average non-food spend Richmond, Twickenham and Teddington is significantly higher than East Sheen and Whitton as shown in Table 2.

Table 2 Non Food Expenditure within the Centres

Non Food Expenditure	Average Expenditure				
	Richmond	Twickenham	East Sheen	Teddington	Whitton
Average per visitor	£30.85	£6.33	£4.95	£37.78	£7.95

Source: Question 9, NEMS Survey April 2014

There is a range of average spend per visitor for eating and drinking out, as set out in Table 3, with Twickenham and Teddington experiencing the highest average spend (£19.23 and £18.52 respectively) and Whitton and East Sheen the lowest (96p and £1.30 respectively). However, it should be noted that only respondents who stated that they would be shopping during their visit were asked these questions, and as such the spending on eating/ drinking out will be underestimated, and accounts for the high proportion of respondents who answered that they would not be spending anything. In addition, as indicated earlier this daytime survey has under-estimated the importance of eating and drinking out in the centres.

Table 3 Expenditure on eating/drinking out within the Centres

Eating/Drinking Out Expenditure	Average Expenditure				
	Richmond	Twickenham	East Sheen	Teddington	Whitton
Average per visitor	£8.13	£19.23	£1.30	£18.52	£0.96

Source: Question 9, NEMS Survey April 2014

Around half of the respondents in Richmond (45.7%), Twickenham (47.5%) and Teddington (54.0%) were intending to eat or drink, use leisure or entertainment facilities during their visit. Of those who did intend to visit any leisure/entertainment facilities the most popular activity in all centres was to visit a restaurant.

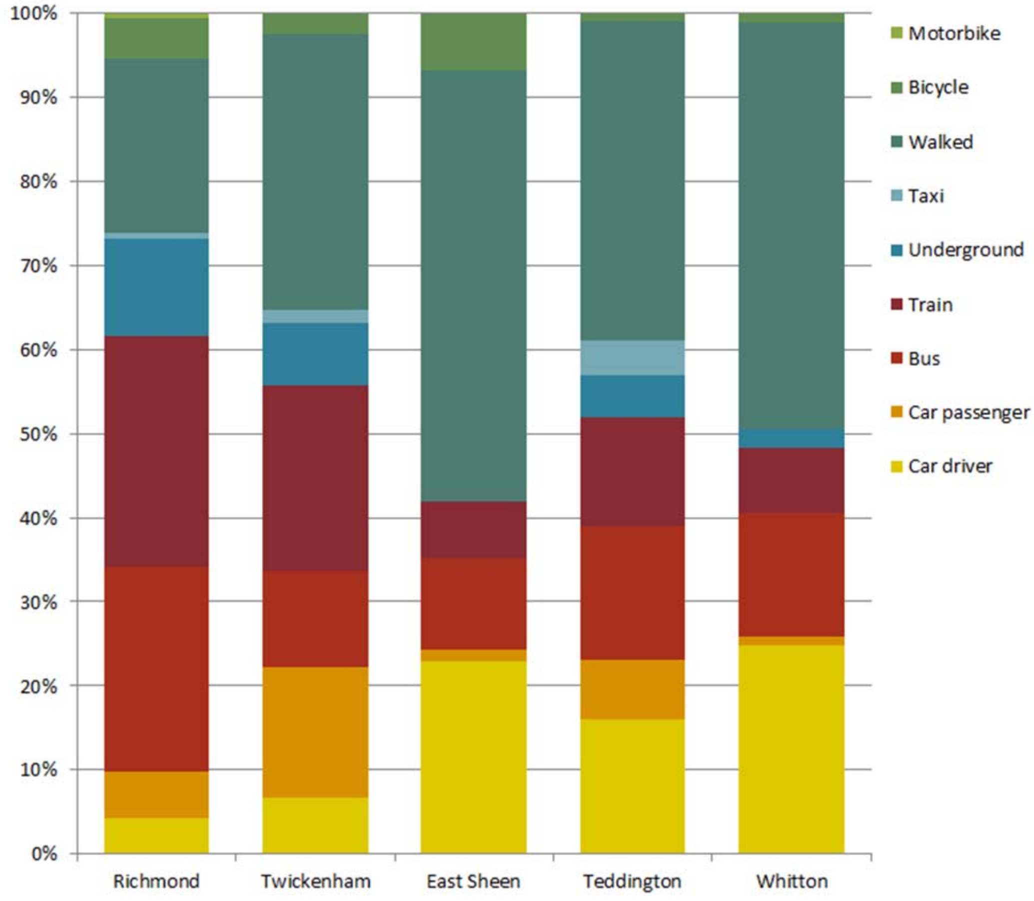
Mode of Travel

The majority of visitors travelled to Twickenham, East Sheen, Teddington and Whitton by foot, which suggests these centres have a relatively localised catchment. The majority of visitors to Richmond travelled by train.

A high proportion of visitors to the all centres travelled by public transport – train/tube and bus/ coach, which is to be expected in an urban location.

The in-street surveys suggest a higher proportion of visitors walk to the town centres, and a lower proportion travel by car than the household survey results, which may be explained by the higher frequency of trips made to the town centres on foot, i.e. frequent day to day trips to the town centre are more likely to be made on foot, whilst more infrequent shopping trips (e.g. bulk food shopping) are made predominantly by car.

Figure 3 Mode of Travel



Source: Question 12 NEMS Survey, April 2014

Other Shopping Destinations

Respondents were asked which other shopping centres they regularly use (i.e. at least once a month), as shown in Table 4. The results indicate that other shopping centres outside Richmond are important alternative shopping destinations. Kingston is an important shopping destination with a total of

42.8% of respondents from all centres stating they regularly shop there, while 20.9% of all respondents regularly shop in London's West End.

A high proportion of respondents in Twickenham (42.6%), East Sheen (50%), Teddington (30.0%) and Whitton (42.7%) also stated that they regularly shop in Richmond, confirming the attraction of Richmond as the highest order centre in the Borough.

Table 4: Other Regular Shopping Destinations

Shopping Centre/ Town	% Respondents in Each Centre				
	Richmond	Twickenham	East Sheen	Teddington	Whitton
Twickenham	7.3	n/a	10.8	26.0	49.4
Richmond	n/a	42..6	50.0	30.0	42.7
Kingston	43.9	40.2	40.5	51.0	37.1
Hounslow	6.7	6.6	5.4	6.0	27.0
Teddington	3.0	4.5	1.4		14.6
London- West End	26.2	21.3	20.3	25.0	6.7
East Sheen	1.8	n/a	n/a	1.0	4.5
Westfield White City	18.9	12.3	6.8	8.0	2.2
Wandsworth	3.0	n/a	4.1	1.0	2.2
Clapham	9.8	9.8	5.4	2.0	1.1
Staines	1.2	n/a	n/a	n/a	1.1
Hammersmith	1.2	n/a	8.1	n/a	n/a
Whitton	n/a	4.9	n/a	3.0	n/a

Source: Question 15, NEMS Survey April 2014

Duration of Visit

Table 5 shows the time visitors intended to spend in each centre. The highest proportion of people in Richmond and Twickenham spent 2-3 hours in the centre. The majority of people spend over 3 hours in Teddington. The highest proportion of visitors to East Sheen spend between 31 –60 minutes in East Sheen and the highest proportion of visitors to Whitton spend between 1-1 ½ at the centre. Respondents spent the longest time on average in Teddington (just under 2 hours) and the least amount of time in East Sheen (67 minutes).

Table 5: Duration of Visit

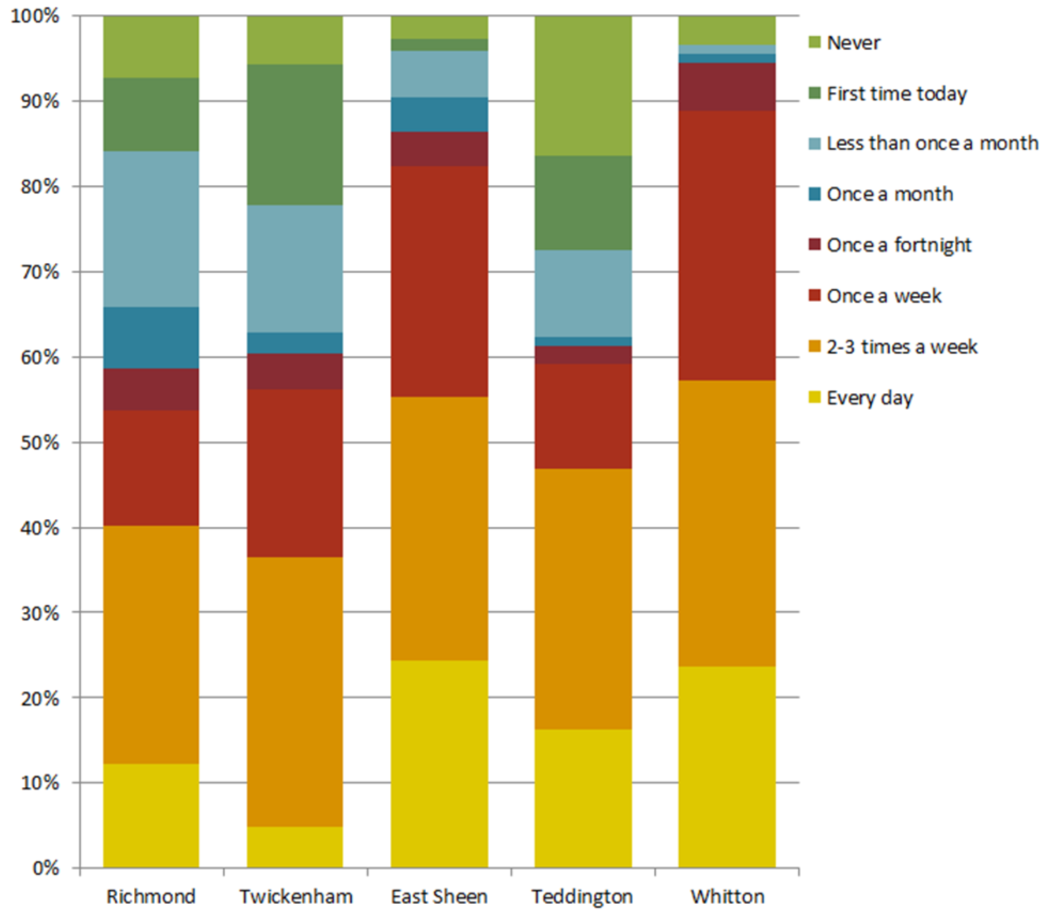
Time	Average Duration of Visit (minutes)				
	Richmond	Twickenham	East Sheen	Teddington	Whitton
Average	88.17	111.89	67.66	116.87	75.22

Source: Question 16 NEMS Survey, April 2014

Frequency of Shopping

Respondents were asked how often they shop in the centres, as shown in Figure 4. In all centres the greatest frequency of visits is 2-3 times a week. East Sheen had the greatest proportion of respondents visiting the centre every day (24.3%), closely followed by Whitton (23.6%), compared to the other centres.

Figure 4 Frequency of Visit



Source: Question 17 NEMS Survey, April 2014

Rating of Centres

Visitors were asked to rate each centre on a range of different factors, and the average score for each centre is shown in Table 6. Scores of under -0.5 suggest an overall rating of “poor” to “very poor” (shown in red). Scores of 0.5 to 2 suggest an overall rating of “good” or “very good” (shown in green). Scores of between -0.5 to 0.5 suggest a neutral rating with equal proportions rating the centre as “good” or “poor”. The centres were rated as follows:

- Richmond - 13 factors rated as “good”, 2 factors rated as “poor”;
- Twickenham - 11 factors rated as “good”, no factors rated as “poor”;
- East Sheen - seven factors rated as “good”, three factors rated as “poor”;
- Teddington - 13 factors rated as “good”, no factors rated as “poor”,

- Whitton- 10 factors rated as “good”, no factors rated as “poor”.

The factors rated “poor” in the centres within the borough relate to parking and traffic congestion- car parking availability and charges in both Richmond and East Sheen, and traffic congestion in East Sheen.

The range and quality of shops and services, quality and number of places to eat and drink, quality of the general shopping environment, layout of the centres and the size of quality of supermarkets was rated “good” in all five centres. Overall Whitton had the highest score (1.03) and Twickenham the lowest (0.60).

Table 6 How visitors rate the centres

Factor	Richmond	Twickenham	East Sheen	Teddington	Whitton
Car parking availability	-0.59	-0.09	-0.67	-0.23	-0.01
Car parking charges	-1.19	-0.45	-0.64	-0.46	0.49
Traffic congestion	0.34	-0.26	-0.7	0.08	0.00
Personal safety	1.26	1.55	1.30	1.60	1.60
Range of shops and services available	1.16	1.03	0.76	1.23	0.93
Quality of shops and services available	1.24	1.25	1.03	1.35	1.06
Daytime entertainment/leisure facilities	0.86	0.53	-0.16	0.69	-0.05
Evening entertainment/leisure facilities	1.01	0.63	-0.2	0.81	-0.16
Town Centre events	0.53	0.39	-0.22	0.63	0.05
Liveliness/street life/character	0.94	0.90	0.36	1.09	0.71
Quality/number of places to eat/drink	1.35	1.28	0.86	1.45	1.00
General shopping environment	1.16	1.00	0.90	1.30	1.00
Planting/landscaping	0.85	0.45	0.49	0.9	0.51
Layout of centre	0.83	0.73	0.52	1.01	0.54
Size/quality of supermarkets	0.91	0.66	0.82	0.79	0.88
Average Score	0.65	0.60	0.28	0.75	1.03

Source: Question 80, NEMS Survey, April 2014

Based on a scoring system of -2 for very poor, -1 poor, 0 neutral, 1 good and 2 for very good

***Green** = Good to Very Good (0.5 to 2)*

***Black** = Neutral (-0.5 to 0.5)*

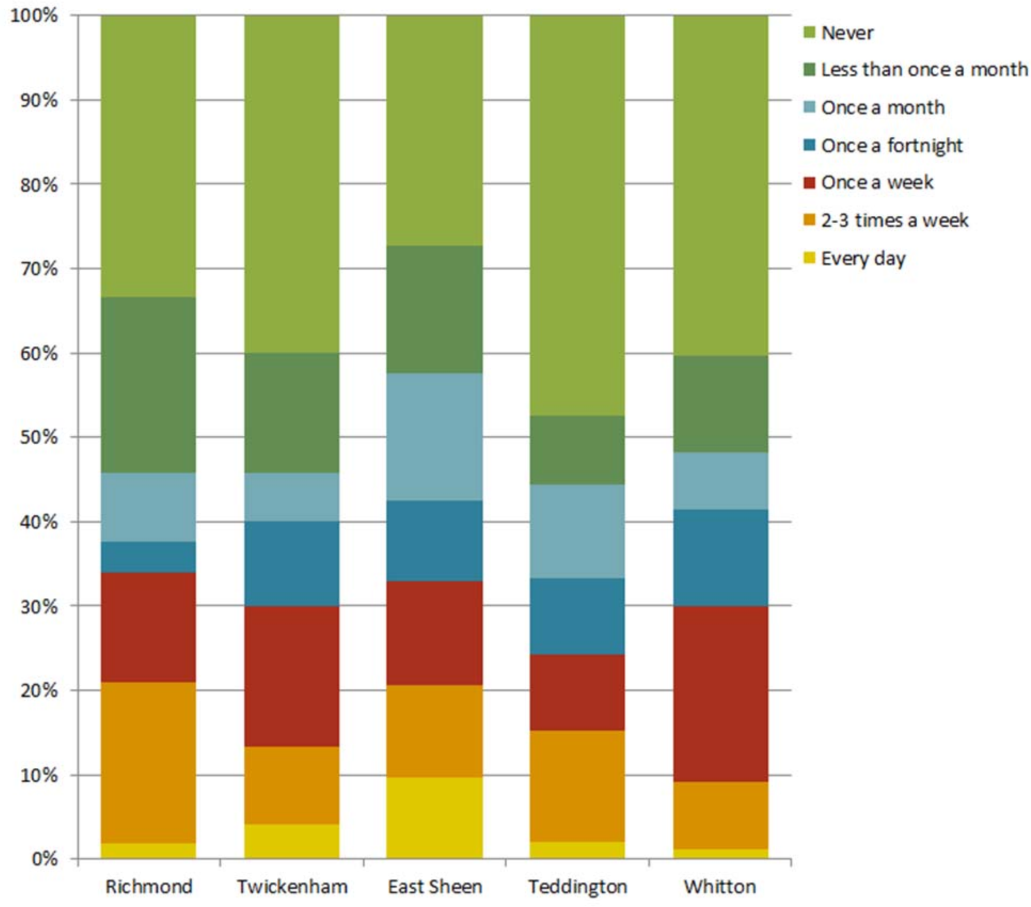
***Red** = Poor to Very Poor (-0.5 to -2)*

Respondents were asked whether the centres had improved, declined or stayed the same. In most of the centres, the majority of respondents felt the centre stayed the same (37% in Teddington; 52.7% in East Sheen; 47.2% in Whitton; and 48.4% in Twickenham). Around a third of respondents in Richmond (31.7%) felt the centre had improved.

Evening Activity

Visitors were asked how often they visited the centres in the evenings, as shown in Figure 5. Overall only 61.6% of respondents also visited the centres in the evening. East Sheen had the highest proportion of respondents who stated that they visit the centre in the evening (73%). The lowest proportion was in Teddington with 53% visiting the centre in the evening.

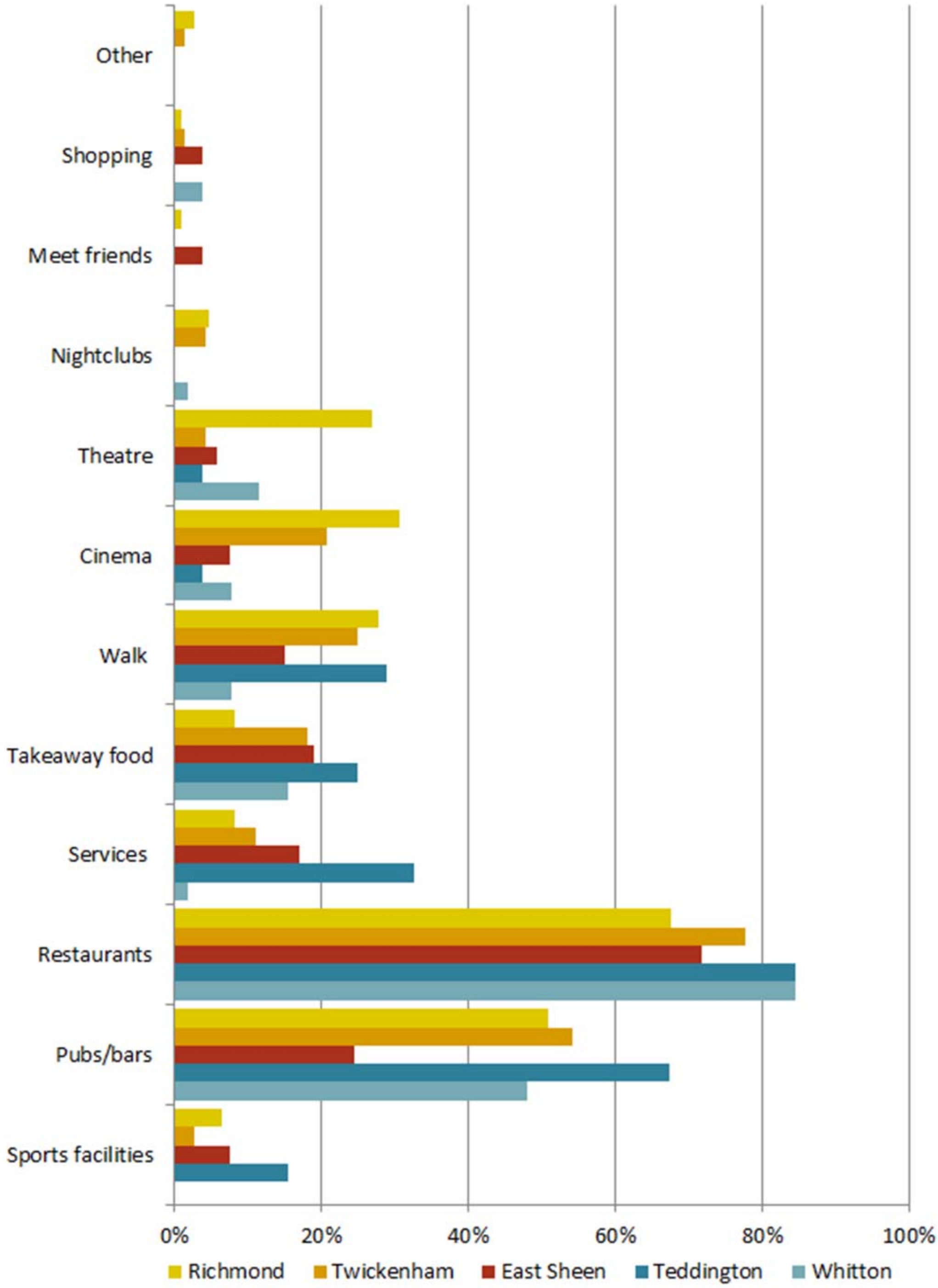
Figure 5 Visit to the Centres in the Evening (%)



Source: Question 20 NEMS Survey, April 2014

The main reasons most respondents visited the four centres in the evening was to go to pubs/bars (43.2%) and restaurants (65.9%). Over 67% of respondents visited Richmond during the evening, with most visiting restaurants. A significant proportion also visited Richmond in the evening to go to the cinema (30.6%) and to the theatre (26.9%).

Figure 6 Reasons for Visiting the Centres in the Evening

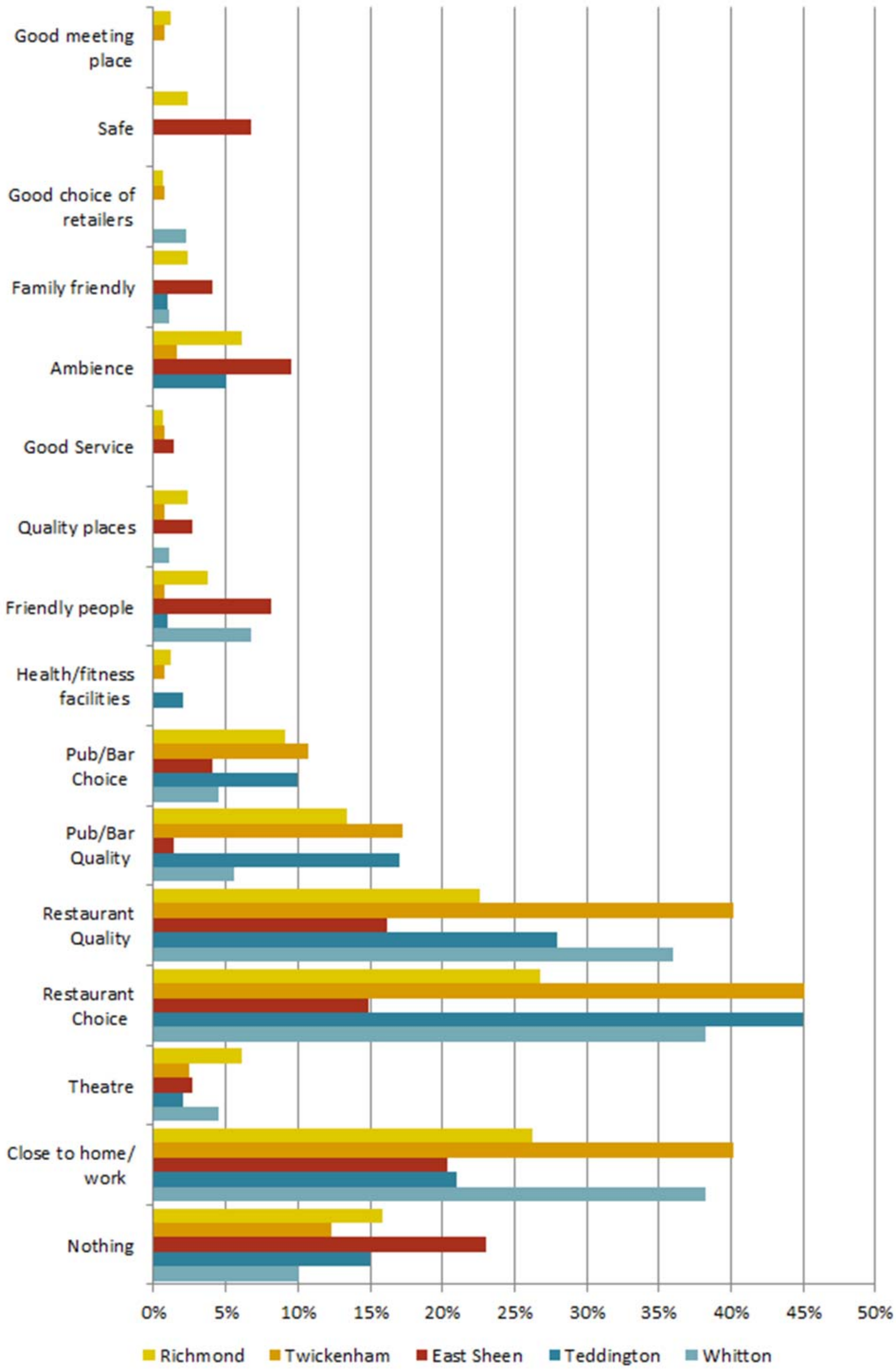


Source: Question 21, NEMS Survey April 2014
(May not sum to 100% as more than one response may be given to question)

The main reasons most respondents visited the four centres in the evening was to go to pubs/bars (43.2%) and restaurants (65.9%). Over 67% of respondents visited Richmond during the evening, with most visiting restaurants. A significant proportion also visited Richmond in the evening to go to the cinema (30.6%) and to the theatre (26.9%).

Visitors were asked what they liked and disliked about the leisure, pub and bars and restaurant facilities in the centre.

Figure 7 Likes about Leisure Facilities



Source: Question 22, NEMS Survey April 2014
(May not sum to 100% as more than one response may be given to question)

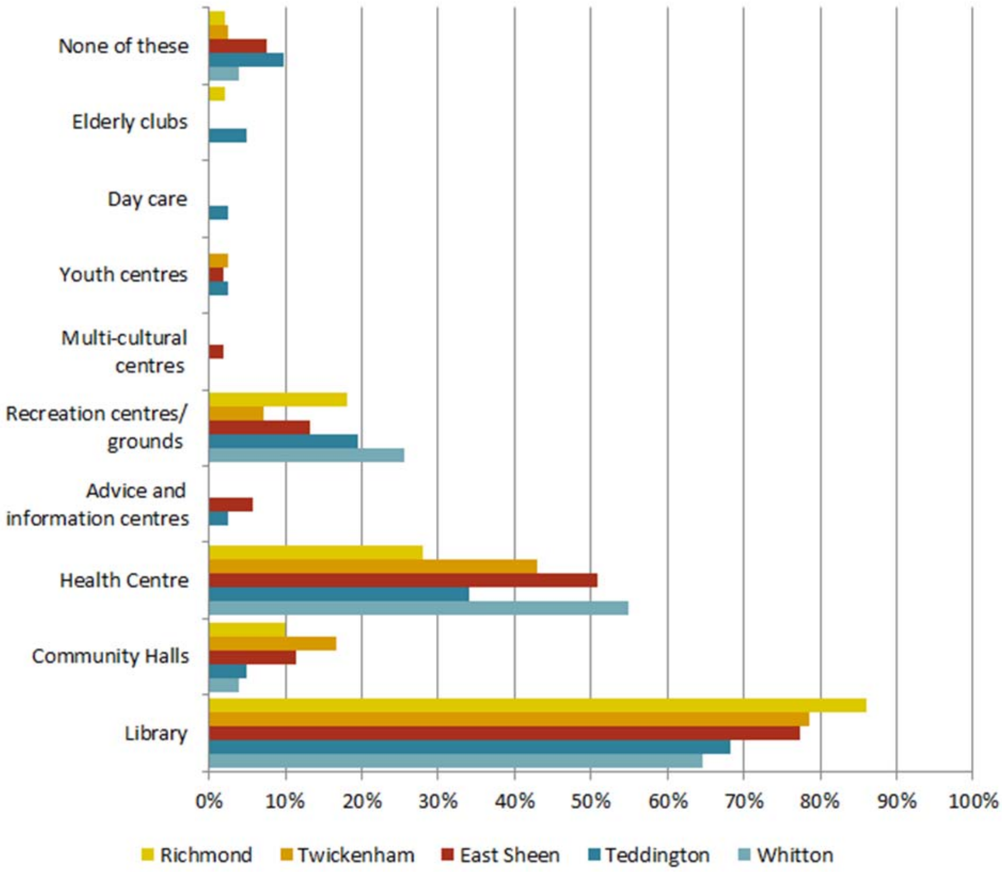
For all the centres, excluding East Sheen, the highest proportion of respondents liked the good choice of restaurants within the centres; this being highest in Twickenham 45.1%). For East Sheen the highest proportion of respondents considered that there was nothing in particular that they liked about the leisure facilities. Being close to home was also a factor respondents liked about the leisure facilities in the centres, especially in Twickenham and Whitton (40.2% and 38.2% respectively).

The majority of respondents suggested that they dislike nothing in particular about the leisure/restaurants/pubs and bars in all the centres. Lack of car parking was another popular factor in why visitors disliked the centre, especially in Teddington (20%). 8.5% disliked Richmond due to car parking charges and 8.1% disliked visiting East Sheen for leisure uses as it is too expensive.

Community Facilities

Respondents were asked whether they ever came to the centres to visit community facilities. Around 43% said they did across all centres, with the highest proportion from East Sheen (71.6%). Figure 8 below shows community facilities used by visitors to the centres.

Figure 8 Community Facilities



Source: Question 25, NEMS Survey April 2014
(May not sum to 100% as more than one response may be given to question)

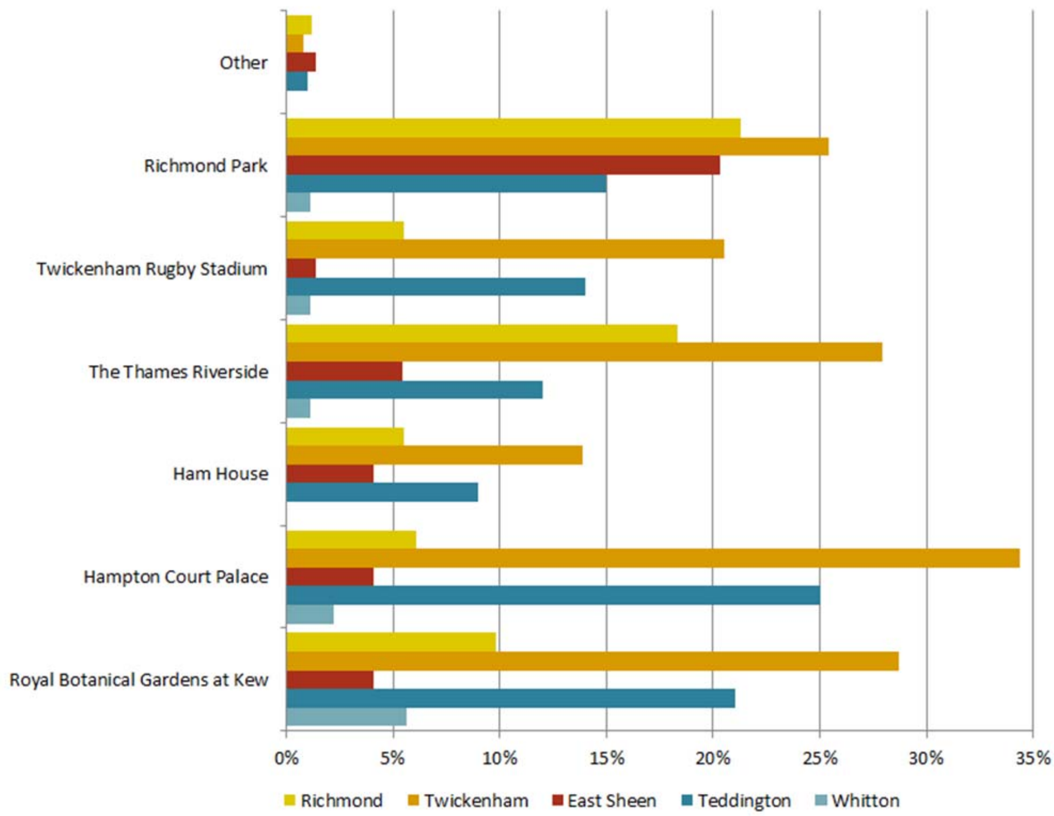
Of those that visited community facilities, libraries were the most popular facility across all centres, followed by health centre and recreational centres/ grounds.

Tourism

Around two third of responded who lived outside the borough were visitors from outside greater London. 11% were visitors from outside the UK. Richmond, Twickenham and Teddington saw the most visitors from outside the borough (55.5%, 45.9% and 51% respectively). The large majority of visitors from outside the borough were not spending an overnight stay in the borough (1.3%).

Respondents were asked which, if any, tourist destinations they were intending to visit (or had visited) that day. The results are identified in Figure 9.

Figure 9 Tourism



Source: Question 4, NEMS Survey April 2014
(May not sum to 100% as more than one response may be given to question)