LONDON BOROUGH OF RICHMOND UPON THAMES

Town Centre Health Checks 2013

Full Report

Produced by Planning Policy Section

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Town Centre Health Checks 2013

Published 2013

Produced by LDF Team
contact: Fiona O'Toole
ldf@richmond.gov.uk

Contents:

List of Tables

1. Introduction

The National Planning Policy Framework requires local authorities to ensure that planning policies are based on adequate and up-to-date evidence. It states that it should be used to assess the role and function of town centres and the relationship between them, including any trends in the performance of centres (Para 161). The London Plan policy 4.7 also requires London Boroughs to undertake regular town centre health checks.

It is good practice to have up-to-date information on the buoyancy of town centres, particularly now, as the country is in recession and at a time when the retail sector is changing, perhaps fundamentally, particularly because of the growth of internet shopping. Nationally, the retail sector appears to be in decline, with rising vacancy rates and retailers going into administration a regular topic in the news. The government and other organisations have focussed attention on town centres. Of note is the Portas Review which identified 28 recommendations for improving town centres, most of which were accepted by the government[1]. A key question is whether Richmond's centres reflect these national trends or are they more resilient to the changes than elsewhere.

This research contributes to ensuring that the LDF evidence base relating to this subject is up-to-date and that information is available to assist in monitoring the effectiveness on both planning policies and inform economic development objectives and initiatives. Separate health checks were produced for Twickenham town centre in January 2011 as background work for the Twickenham Area Action Plan. This research will up-date them in part and also cover the other main town centres of Richmond, Twickenham, East Sheen and Whitton and Barnes local centre. Tables with data on other local centres are included in Appendix 2. With the exception of Twickenham, town centre health checks have not been produced since 2006 and therefore it is timely to undertake this research now.

The project will also provide monitoring data on the health of town centres which have benefited from a range of investment including the Mayor's Outer London Fund, TfL, and Council – Town Centre Opportunities Fund/Civic Pride Fund.

The Council has undertaken or commissioned several research reports which are relevant, including the GVA Grimley report which forecasts the need for retail floorspace in the borough. The Council carries out town centre land use surveys annually, and reports on key indicators in the Authority's Monitoring Report[2] which also has a full list of research produced.

Borough Context

Richmond town centre is the largest centre in the borough. Food retailers represented in the centre include Waitrose, Tesco Metro and a Marks and Spencer "food hall". US Wholefoods are expected to take up the Lower George Street redevelopment shortly. There is a good range of comparison goods retailers, both multiples and independents and a House of Fraser department store. Much of the spending on non-food goods by borough residents is in fact spent elsewhere, notably in Kingston.

There are four district centres located in the borough: Twickenham, East Sheen, Teddington, & Whitton. Each has over 100 units. They provide both convenience shopping and a more limited range of comparison goods shopping plus a variety of services. Local centres of varying size complement the town centres, providing for essential day-to-day needs, as do isolated groups of shops. Barnes is the largest of these local centres.

As well as the food shopping available in town centres, there are also a number of large stand-alone superstores both within the borough and beyond the borough boundary.

The Council's adopted Core Strategy as identified a hierarchy of town centres across the borough which is as follows:

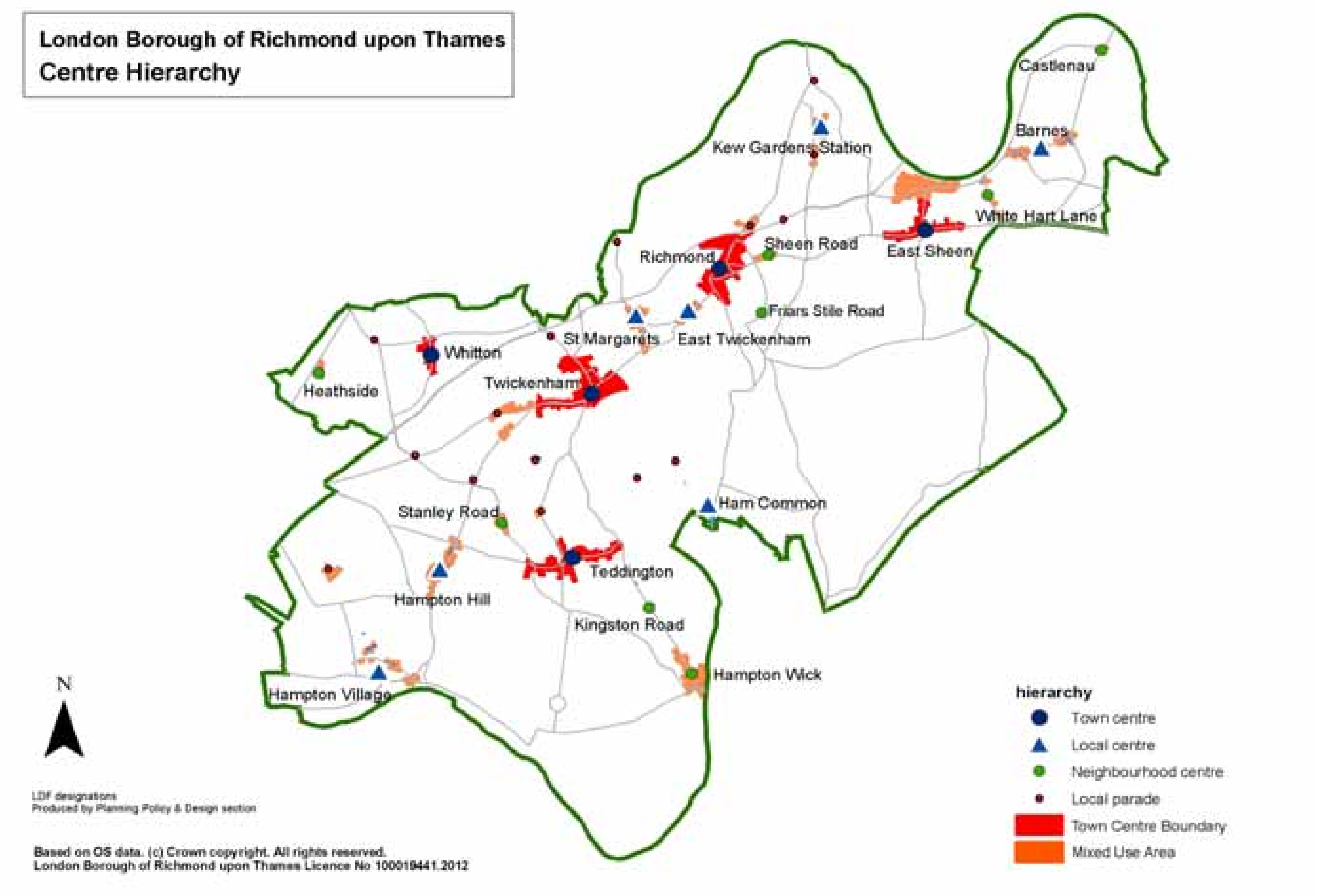
[1] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/7525/2120019.pdf

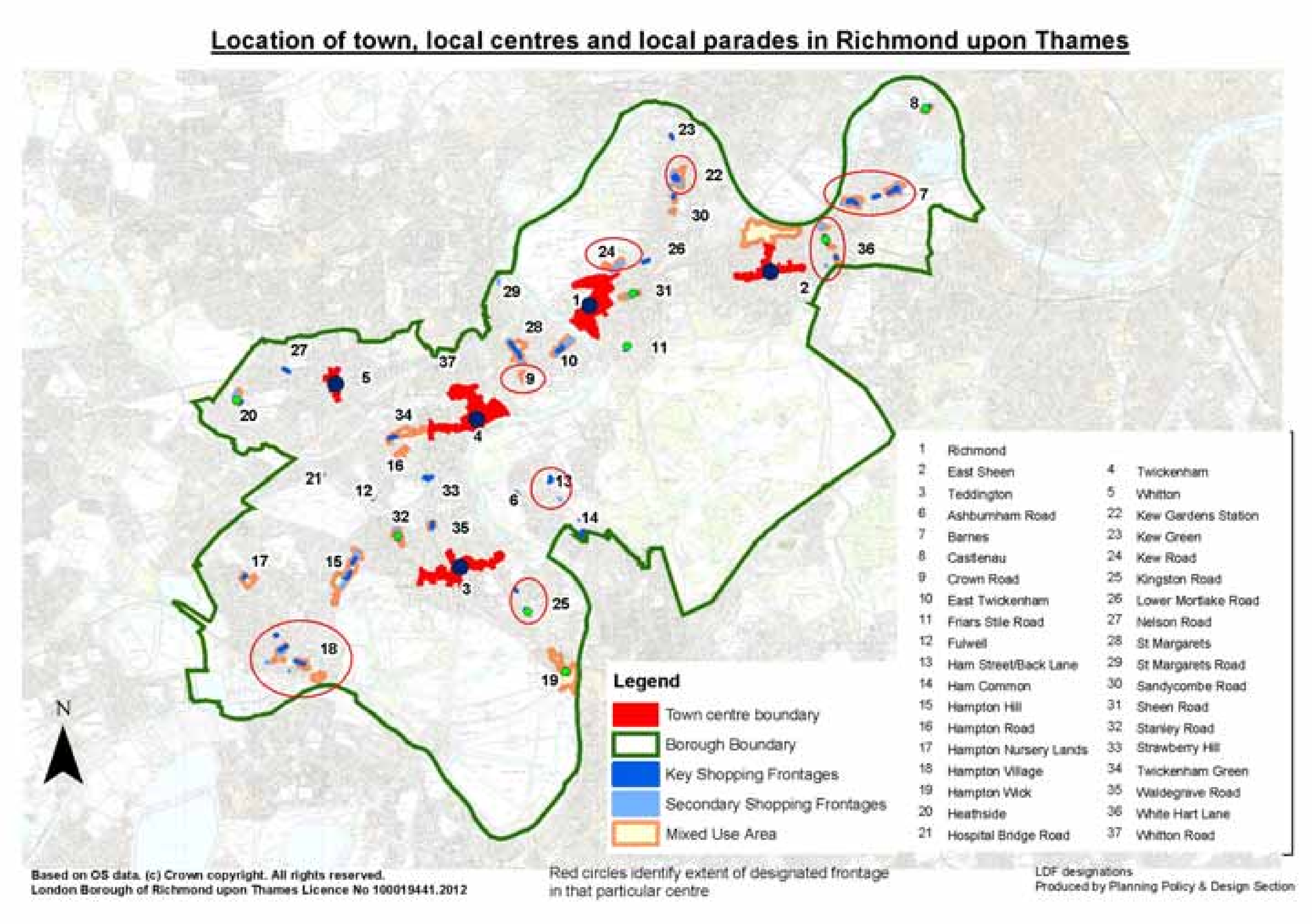
[2] http://www.richmond.gov.uk/home/environment/planning/planning_guidance_and_policies/local_development_framework/authority_monitoring_report.htm

Table 1: Town Centre Hierarchy

Type of Centre	Name of Centre
Major town centre (with many shops services, employment and entertainment which service a much wider catchment than just the local population)	Richmond
District centres (shops and services primarily serving local catchments but providing for main weekly convenience shopping)	Twickenham, Teddington, East Sheen and Whitton
Local centres (shops and services for day to day needs, some small offices)	Barnes, East Twickenham, Hampton Hill, Hampton Village, Ham Common, Kew Gardens Station, St Margaret's
Neighbourhood centres (shops and services for day to day needs)	Castelnau; Friars Stile Road; Hampton Wick; Heathside (Powder Mill lane); Sheen Road; Kingston Road, Teddington; Stanley Road, Teddington; White Hart Lane
Parades of local importance	Various across the Borough

Map 1: Town centre hierarchy




Location of town, local centres and local parades in Richmond upon Thames
Legend
Town centre boundary
Borough Boundary
Key Shopping Frontages
Secondary Shopping Frontages
Mixed Use Area
1 Richmond
2 East Sheen
3 Teddington
6 Ashburnham Road
7 Barnes
8 Castlenau
9 Crown Road
10 East Twickenham
11 Friars Stile Road
12 Fulwell
13 Ham Street/Back Lane
14 Ham Common
15 Hampton Hill
16 Hampton Road
17 Hampton Nursery Lands
18 Hampton Village
19 Hampton Wick
20 Heathside
21 Hospital Bridge Road
4 Twickenham
5 Whitton
22 Kew Gardens Station
23 Kew Green
24 Kew Road
25 Kingston Road
26 Lower Mortlake Road
27 Nelson Road
28 St Margarets
29 St Margarets Road
30 Sandycombe Road
31 Sheen Road
32 Stanley Road
33 Strawberry Hill
34 Twickenham Green
35 Waldegrave Road
36 White Hart Lane
37 Whitton Road
N
Based on OS data. (c) Crown copyright. All rights reserved.
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Red circles identify extent of designated frontage in that particular centre
LDF designations
Produced by Planning Policy & Design Section

Regional context

The London Plan July 2011.
A number of policies relating to town centres. Key policies are 2.15, 4.7, 4.8 and 4.9. It classifies centres in Greater London according to a town centre network (Annex 2). Richmond town centre is classified as a “major centre” (with a night-time cluster of regional/sub-regional importance and Twickenham, Teddington, East Sheen and Whitton are classified as “district” centres. The neighbouring centres of Kingston, Ealing and Hounslow are classified as higher tier “metropolitan centres”.

Table 2: Classification of borough centres in Mayor’s Town Centre Network

Centre	Borough Classification	Night time Economy clusters 2	Policy Directions 3	Office Guidelines 4
Richmond	Major	NT2	Low	A
Twickenham	District	NT3	Medium	A
East Sheen	District		Medium	
Teddington	District		Medium	
Whitton	District		Medium	

2 NT1 = International; NT2 = Regional/sub-regional; NT3 = More than local significance.
3 Policy directions (high/medium/low) are explained in paragraph A2.6. ‘R’ indicates centres in need of regeneration.
4 Office guidelines (see Policy 4.2) provide a broad indication of the approach to office development based upon research in the London Office Policy Review 2009, distinguishing between centres where:
A speculative office development could be promoted on the most efficient and accessible sites in the context of wider schemes to enhance the environment and offer of the centre as a commercial location. This might entail some long-term net loss of overall office stock through change of use of provision on less attractive sites.

Under Policy 2.16 Richmond/ Kingston is also identified as a potential Outer London Development Centre for Leisure/tourism/arts/culture/sports having a strategic function of greater than sub-regional importance.

Trends in retailing

Local trends:

- the number of A1 uses (shops plus retail services such as hairdressers, dry cleaners and Post Offices) has fallen in the borough. The Council’s land use survey reveals that there were 70 fewer A1 outlets across the borough in 2012, compared to 1997. This is a 5% fall.

National trends:

- The trend of retailers reducing the number of stores and thus concentrating in the larger centres continues. This can be seen in Richmond where retailers such as Fat Face and Crew have closed stores here, relying instead on their branches in Kingston, a much larger centre and Richmond’s main competition for comparison goods spend.

- Growth of multichannel retailing - In short, this means selling from shops, on-line and through mobile devices – mobile phones and tablets (m-commerce). Marks and Spencer have recently opened a new flagship multi-channel store at Cheshire Oaks. It hosts click-and-collect areas and separate browse-and-order points where shoppers can select items which are not stocked in store. It also offers virtual make-overs. Although this format works well out of town it is also possible to incorporate some elements in a much smaller space in the high street. Indeed shop assistants with tablets could reduce the space needed for terminals.

- Smaller format department stores- John Lewis and others are opening much smaller stores which do not have the full range of stock. Tied into this trend is click-and-collect, which may well prove very popular, either with retailers incorporating facilities within their stores, via stand alone collection shops (House of Fraser), collection lockers (Amazon), or facilities which service several different retailers. Easy parking could be crucial as well as opening hours. Whilst some believe that m-commerce is the way of the future, although it currently represents less than 1% of overall retail sales.

Recent national trends:

- Closure of multiples during the first half of 2012 953 multiples closed in the top 500 town centres versus 175 for the whole of 2011.

- Growth in first half of 2012 in leisure and service sectors driven by growth from cafes, nail salons, tattooing and piercing, takeaway food shops and pawnbrokers.

Future trends could include:

- Mobile and digital technology to become more important
- Bricks & mortar retailers to create more of an experience for shoppers - a sense of theatre
- Growth in pop-up shops, possibly event-orientated
- Non-traditional retailers such as ebay and google seeking high street representation. (Although, some eretailers like Kiddicare are moving into bricks and mortar supplementing their store at Peterborough with a further 10 stores by 2013.)
- Growth in foreign retailers in High Street
- Farmers markets
- Fashion retailers - fewer and larger stores
- High Streets to develop individuality and become more interesting
- More closures, reduction in number of brands especially tough for middle market retailers. Retailing could be split between the luxury retailers and those competing purely on price.
- Petrol stations as new retail hubs.

Certainly there are structural changes occurring in the retail sector, with multichannel retailing like to be the future, and potentially an overall reduction in retail space needed across the UK.

Other commentators suggest that rather than these new challenges the major problems in the High Street remain: lack of parking, high rents and high rates, including the business rates. Solutions may lie to some extent with retailers themselves and their ability to provide quality of service, affordability and put simply, sell what people want to buy. The challenge may be to tailor the approach to rejuvenating town centres to fit the characteristics of the local area and to make them attractive to local communities - who have the purchasing power to save/ support them. In this borough, the challenge will be to make the best of the assets we have in some centres, and support and develop the offer in others.

2. Richmond town centre

Richmond is an attractive shopping centre with a sub-regional role. Its retail offer is the most extensive in the borough, having a range of multiples and independents. It has the added attractions of the River Thames and the Green, many restaurants and cafes and cultural provision including the theatre which add to its success.

It is the most accessible centre by public transport and is therefore most appropriate location for new retail, office, leisure and tourism uses which attracts both local people and people who live outside the Borough. The overall strategy recognises that the centre should be reinforced to an extent compatible with environmental constraints, resulting from the many listed buildings and conservation areas in the core of the town centre.

Regional context

Richmond is identified in the London Plan (2011) as a major centre, has a night time economy cluster of regional/sub-regional importance. It defines a policy direction classified as “low growth” (policy A2.6), here the London Plan provides guidance on the future policy direction of centres. Low growth is described as “town centres that are encouraged to pursue a policy of consolidation by making the best use of existing capacity, either due to (a) physical, environmental or public transport accessibility constraints, or (b) low demand.” However, it is acknowledged that such categorisations are indicative and refer to the broad potential for the whole centre and not individual sites. Richmond’s growth is considered modest compared to other major centres in London. However, it is identified as the centre for the majority of the borough’s retail growth in the adopted Core Strategy.

Office guidelines - (see Policy 4.2) provide a broad indication of the approach to office development based upon research in the London Office Policy Review 2009: Speculative office development could be promoted on the most efficient and accessible sites in the context of wider schemes to enhance the environment and offer of the centre as a commercial location. This might entail some long-term net loss of overall office stock through change of use of provision on less attractive sites.

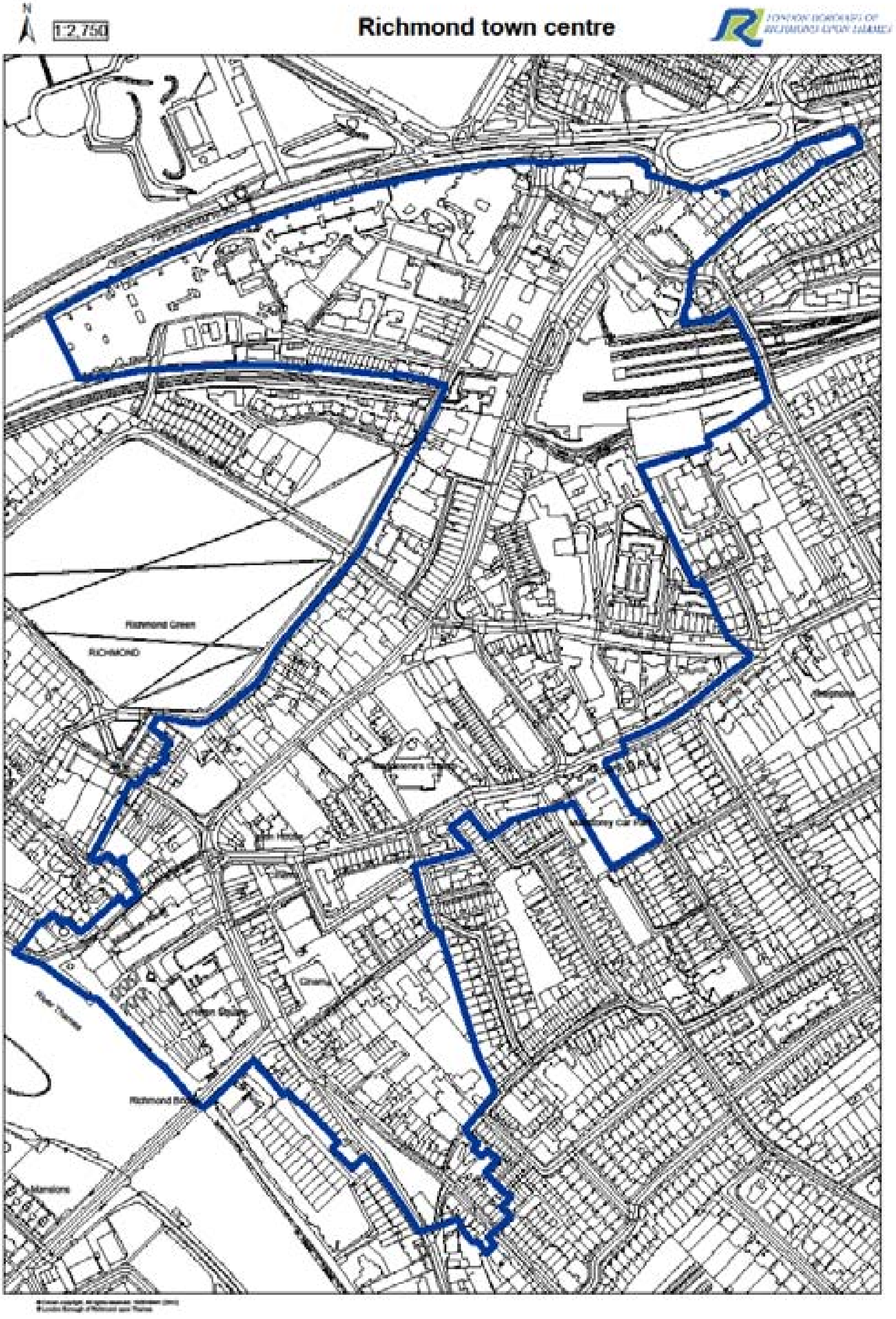
Richmond/Kingston is also identified as a potential strategic Outer London development centre for leisure/tourism/arts/culture/ sports (Policy 2.16).

Village plan for Richmond and Richmond Hill area

The Council has produced a series of Village Plans following extensive consultation through an All-In-Survey. Please use the following link to access the following web pages.
http://www.richmond.gov.uk/richmond_and_richmond_hill_area_village_plan.htm.

The vision set out in the Village Plan includes the following relating to town centres:

The aim is that Richmond will continue to be a thriving major centre with convenience and specialist shops, employment, leisure and tourism, cultural and social facilities. The local centres will provide for the day to day needs of residents with an increase in specialist shops to attract visitors. The growth of the evening economy will be carefully managed to ensure the amenity of residents is maintained and the possibility of gaining Purple Flag status will be explored. The character outside the centre although largely residential has a number of offices and other facilities, which will be retained.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1:2,750
Richmond town centre
Richmond Green
RICHMOND

2.1 Diversity of uses in Richmond town centre

2.1 a) Mix of uses: business activity

Table 3: Diversity of uses in Richmond town centre

Planning policy designation*1	Use Class	2000	2001	2002	2004	2006	2008	2010	2011	2012	2000	2001	2002	2004	2006	2008	2010	2011	2012	Town centre average 2012
		number of uses									percentages									
KEY	**A1**	174	173	168	172	172	175	177	166	164	72.2	73	71.2	73.2	72.9	74.2	74.1	70.0	70.7	69.3
	A2	10	9	9	11	10	10	11	12	12	4.1	3.8	3.8	4.7	4.2	4.2	4.6	5.1	5.2	7.6
	A3/A4/A5*2	36	36	37	37	34	35	35	34	32	14.9	15.2	15.6	15.7	14.4	14.8	14.6	14.3	13.8	13.4
	Other	12	10	10	7	7	4	5	5	6	5	4.2	4.2	3.0	3	1.7	2.1	2.1	2.6	2.4
	Vacant	9	9	12	8	13	12	11	20	18	3.7	3.8	5.1	3.4	5.5	5.1	4.6	8.4	7.8	6.5
	Total	241	237	236	235	236	236	239	237	232										
SECONDARY	**A1**	42	45	45	44	44	44	41	39	44	39.6	42.5	42.1	42.7	42.7	43.1	40.6	38.6	44.0	51.5
	A2	21	21	21	19	19	20	18	14	14	19.8	19.8	19.6	18.4	18.4	19.6	17.8	13.9	14.0	10.5
	A3/A4/A5	29	28	29	29	31	29	25	26	27	27.4	26.4	27.1	28.2	30.1	28.4	24.8	25.7	27.0	20.7
	Other	3	3	3	3	4	4	6	5	5	2.8	2.8	2.8	2.9	3.9	3.9	5.9	5.0	5.0	9.0
	Vacant	11	9	9	8	5	5	11	17	10	10.4	8.5	8.4	7.8	4.9	4.9	10.9	16.8	10.0	9.2
	Total	106	106	107	103	103	102	101	101	100										
NON-DESIGNATED	**A1**	4	6	6	7	7	5	4	4	6	36.4	54.5	54.5	63.6	46.7	31.3	26.7	25.0	35.3	33.7
	A2	0	0	0	0	0	0	0	1	1	0	0	0	0.0	0	0.0	0.0	6.3	5.9	6.7
	A3/A4/A5	4	4	4	4	5	7	7	6	7	36.4	36.4	36.4	36.4	33.3	43.8	46.7	37.5	41.2	26.4
	Other	3	1	0	0	2	2	2	2	2	27.3	9.1	0	0.0	13.3	12.5	13.3	12.5	11.8	23.8
	Vacant	0	0	1	0	1	2	2	3	1	0	0	9.1	0.0	6.7	12.5	13.3	18.8	5.9	8.3
	Total	11	11	11	11	15	16	15	16	17										
TOTAL FRONTAGE	**A1**	220	224	219	223	223	224	222	209	214	61.5	63.3	61.9	63.9	63	63.3	62.5	59.0	61.3	57.5
	A2	31	30	30	30	29	30	29	27	27	8.7	8.5	8.5	8.6	8.2	8.5	8.2	7.6	7.7	8.5
	A3/A4/A5	69	68	70	70	70	71	67	66	66	19.3	19.2	19.8	20.1	19.8	20.1	18.9	18.6	18.9	18.0
	Other	18	14	13	10	13	10	13	12	13	5	4	3.7	2.9	3.7	2.8	3.7	3.4	3.7	8.0
	Vacant	20	18	22	16	19	19	24	40	29	5.6	5.1	6.2	4.6	5.4	5.4	6.8	11.3	8.3	7.7
	Total	358	354	354	349	354	354	355	354	349										
TOTAL DESIGNATED FRONTAGE	A1	**216**	**218**	**213**	**216**	**216**	**219**	**218**	**205**	**208**	**62.2**	**63.6**	**62.1**	**63.9**	**63.7**	**64.8**	**64.1**	**60.7**	**62.7**	**61.7**
	A2	**31**	**30**	**30**	**30**	**29**	**30**	**29**	**26**	**26**	**8.9**	**8.7**	**8.7**	**8.9**	**8.6**	**8.9**	**8.5**	**7.7**	**7.8**	**8.8**
	A3/A4/A5	**65**	**64**	**66**	**66**	**65**	**64**	**60**	**60**	**59**	**18.7**	**18.6**	**19.2**	**19.5**	**19.2**	**18.9**	**17.6**	**17.8**	**17.8**	**16.5**
	Other	**15**	**13**	**13**	**10**	**11**	**8**	**11**	**10**	**11**	**4.3**	**3.8**	**3.8**	**3.0**	**3.2**	**2.4**	**3.2**	**3.0**	**3.3**	**5.2**
	Vacant	**20**	**18**	**21**	**16**	**18**	**17**	**22**	**37**	**28**	**5.8**	**5.2**	**6.1**	**4.7**	**5.3**	**5.0**	**6.5**	**10.9**	**8.4**	**7.6**
	Total	**347**	**343**	**343**	**338**	**339**	**338**	**340**	**338**	**332**										

source: LBRuT Main Town Centre Land Use Surveys undertaken in Summer. Ground Floor uses surveyed only.
Notes: *1 – Calculations for the Land Use Survey uses shopping frontage designations from the DMDPD. Richmond 's designations were revised: 8-18 The Quadrant redesignated as key shopping frontage., 6-26 Richmond Hill redesignated as secondary shopping frontage.

A3/A4/A5 sector also includes mixed A1/A3 (coffee shops).

Not unexpectedly the majority of the units are in retail use (61%), with a further 19% in the eating and drinking sector. The mix is similar to how it was in 2000, albeit that vacancy rates have fluctuated over this period.

Compared to the other larger centres in the borough Richmond has a higher proportion of shops (over 200 retailers represented, which is by far the greatest) and a slightly higher proportion of businesses in the eating and drinking sector (in terms of numbers it is on a par with Twickenham). The proportion of business which fall into the "other" category (including car showrooms, launderettes, amusement arcades, taxi offices) is relatively small, and is could be due to relatively high demand for premises which may restrict businesses requiring cheaper premises. The proportion of outlets in this Use Class has declined over the period.

The number of shops in the centre has declined since 2000, and much of this change occurred in the last few years. Some of this recent change can be explained by a major redevelopment in the centre. The level of vacancies has increased, in part because of this and also because of an increase in vacant retail units. However, key empty units in George Street and Hill Street have subsequently been occupied by new retailers.

It may be the case that much of the diversification in the centre has occurred before 2000, perhaps with the exception of an increase in cafes and an apparent decline in the number of restaurants in the centre although this is not obvious in main shopping streets.

The adopted shopping designations, which govern change of use from retail, were altered to allow greater diversification in Richmond Hill and this is already happening.

Comparison with other borough centres

Table 4: Diversity of use in borough town centres 2012

town centre	Number of units									
	A1	A2	A3	A1/A3	A4	A5	A3/4/5	Other	Vacant	Total Number of Units
Richmond	214	27	38	8	17	3	66	13	29	349
East Sheen	172	22	29	2	2	10	43	35	19	291
Teddington	112	16	21	7	4	4	36	20	10	194
Twickenham	158	29	34	4	12	15	65	21	26	299
Whitton	74	14	8	3	2	6	19	13	14	134
town centre total	730	108	130	24	37	38	229	102	98	1267
Barnes local centre	67	18	13	5	4	1	23	11	8	127

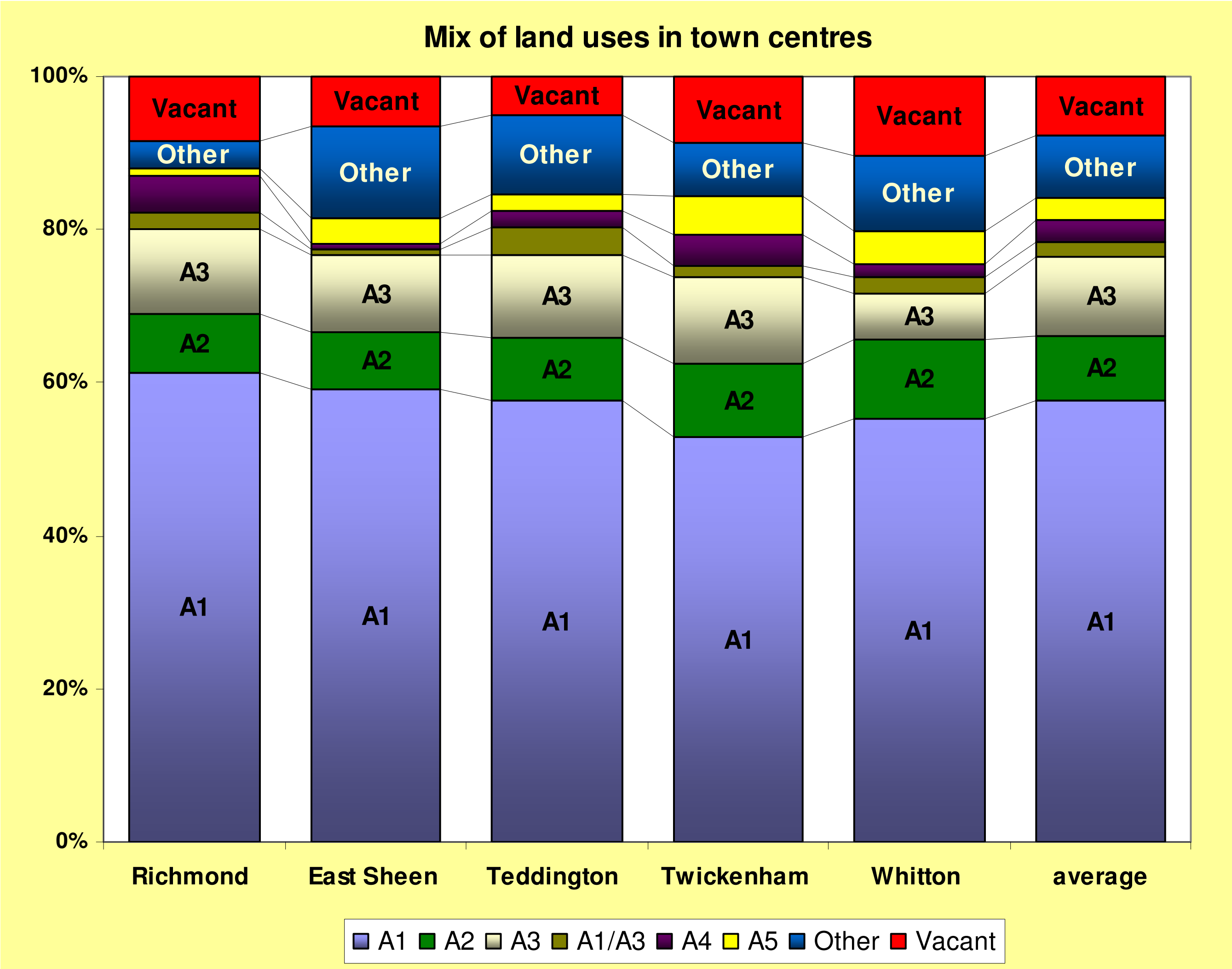
town centre	Percentages								
	A1	A2	A3	A1/A3	A4	A5	A3/4/5	Other	Vacant
Richmond	61.3	7.7	10.9	2.3	4.9	0.9	18.9	3.7	8.3
East Sheen	59.1	7.6	10.0	0.7	0.7	3.4	14.8	12.0	6.5
Teddington	57.7	8.2	10.8	3.6	2.1	2.1	18.6	10.3	5.2
Twickenham	52.8	9.7	11.4	1.3	4.0	5.0	21.7	7.0	8.7
Whitton	55.2	10.4	6.0	2.2	1.5	4.5	14.2	9.7	10.4
town centre average	57.5	8.5	10.2	1.9	2.9	3.0	18.0	8.0	7.7
Barnes local centre	52.8	14.2	10.2	3.9	3.1	0.8	18.1	8.7	6.3

source: LBRuT Main Town Centre Land Use Survey 2012 (undertaken in Summer) Produced by Planning Policy Section

Notes:
1. Adopted UDP 2005 designations are used for comparison.
2. Surveys of all centres are undertaken in the Summer covering all use classes and may include a small number of premises outside of the defined town centre boundaries. The Town Centre Land Use Survey is a snap shot survey, undertaken by observation in the field, i.e. the researcher makes a judgement as to the nature of the occupier at that particular time. It is not verified by an alternative data source. Only the ground floor use is recorded. Analysis counts businesses once per centre unless operating from separate premises within the same centre.

Therefore, the amalgamation of units will not show the increase in floorspace and may in fact indicate a decrease in units in a particular use class, although the denominator would be reduced in line. Likewise subdivisions would increase the number of units in the centre, without impact on floorspace.

Figure 1: Mix of Land Uses in town centres



Charity Shops in borough

A large number of charity shops in a centre can be an indicator of relatively low demand for premises amongst other commercial users since charity shops get a significant discount on business rates and other taxation as well as being staffed mainly by volunteers and therefore have a competitive advantage by operating at a reduced cost. It has also been argued that a proliferation of charity and other "lower quality" uses such as pound shops can have a negative impact on investment by dissuading others from locating there. The following data shows the pattern the larger centres and reveals differences. Notably Richmond has only 3 charity shops which amounts to only 1% of all shops in the centre. It is well-below the UK average in terms of the number of charity shops (a UK index of 33, where the average is 100). Twickenham and East Sheen have the largest number – with 10 charity shops, although comparatively Whitton has the largest proportion.

It has been argued that charity shops provide a community benefit and add to vitality which an empty unit does not. It may also be the case that charity shops actively seek premises in more affluent areas where higher prices can be charged and donations may be of a higher quality than elsewhere.

A system of local retention of a proportion of business rates is soon to be implemented. The number of charity shops in the area will in the future have an impact on revenues received locally.

Table 5: Charity shops in 5 main town centres

	2011		2012		GOAD index comparing number of charity shops to UK average. (100= average)
centre	number of charity shops	percent of shops* in centre	number of charity shops	percent of shops* in centre	
Richmond	3	1	3	1	33
East Sheen	10	6.2	10	5.8	152
Whitton	8	10.8	8	10.8	309
Twickenham	9	5.7	10	6.3	132
Teddington	7	6.3	7	6.3	161

source: Oct 2011 Quarterly Vacancy Survey, 2012 Town Centre Land Use Survey. Produced by Planning Policy Section. Last column source: GOAD Category reports.

*Shops are classified as businesses falling within the A1 Use Class at time of Annual Town Centre Land Use Survey 2011.

The A1 Use Class includes Post Offices, and other A1 services such as opticians, ticket sales, funeral directors, internet cafes.

Table 6: Proportion of A1 uses in designated key shopping frontages

Town centre hierarchy (Core Strategy policy CP 8)	**Proportion of A1 uses in designated key shopping frontages**									
	2012	2011	2010	2008	2007	2006	2005	2004	2002	2001
Richmond	**70.7**	70.0	74.1	74.2	69.5	72.9	72.9	73.2	71.2	73
East Sheen	**75.0**	68.4	69.7	69.7	70	67.5	74.3	76	72.4	68.4
Teddington	**69.0**	68.1	68.2	70.5	70.6	73.9	75	73.9	64.4	71.1
Twickenham	**64.4**	66.7	66.7	67.9	66.4	67.9	64.9	66.4	63.8	67.7
Whitton	**74.1**	74.1	72.5	69.6	72	70.8	72.6	74.7	74.3	73
Average for 5 main town centres	**69.3**	69.1	70.9							
Barnes local centre	**63.6**									
Average local centre	**66.8**									

Source: Annual Monitoring Report 2011/12, LBRuT Town Centre Land Use Surveys. Produced by Planning Policy Section
See Notes to table 2.

71% of businesses/outlets in parts of the centre covered by key shopping frontage designation (to summarise policy generally restricts change of use from retail). This is similar to the town centre average. Figures have fluctuated more recently in part because of the redevelopment of Lower George Street for a soon to open US Wholefoods store. Consequently, 70% of vacancies are vacant shops.

2.1 b) Comparing Richmond town centre to the UK: which sectors which are under-represented?

Please note that there are differences in boundaries and methodology between Experian's surveying and the Council's Town Centre Land Use Surveys. Experian data allow comparison of centres in the borough with a UK average in the form of an Index. It identifies sectors which are under-represented compared to the average, which could potentially be developed.

Whilst the comparison retail sector amounting to approximately 23,500m2, and is well-represented in Richmond, the convenience sector is under-represented in terms of both the number of outlets and the amount of floorspace. The leisure sector is particularly well-represented. (see below).

As with the business mix data, the picture is similar to earlier years with the exception of the proportion of vacant outlets. Although there has been a rise in the UK index, this has been from a very low base and compared to the national average Richmond's vacancy rates remain low.

Table 7: Sectoral comparison with UK

	Jul-05				Jun-11				Apr-12				
	outlets		floorspace		outlets		floorspace		outlets		floorspace		
	number	UK index	amount ft2	UK index	number	UK index	amount ft2	UK index	number	UK index	amount ft2	UK index	floorspace converted to m2
comparison retail (non-food shopping)	173	117	270,100	108	150	118	247,600	111	150	119	241,400	109	22430
convenience retail (food shopping including newsagents, shoe repairs, markets)	19	63	62,500	63	18	59	61,300	71	17	56	59,700	69	5550
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	39	80	47,200	109	44	86	44,700	104	48	94	47,400	110	4400
other retail	1	172	1,900	248	0		0		0				
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	104	133	162,800	121	101	121	163,400	119	104	125	166,800	122	15500
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	45	100	69,100	122	35	84	56,800	112	33	79	53,700	107	4990
Vacant	8	22	6,600	15	33	71	32,100	53	28	61	33,900	56	3150
total	389		618,300		381		605,900		380		602,900		56000

Notes It is the difference between a percentage figure for the centre and the GB average. An index of 100 is an exact match with the national average, whilst an index of below 100 indicates a below average count and a figure of above 100 represents an above average count.

Total may not sum due to rounding.

Under-representation of sectors in Richmond

Experian surveyed most of the larger town centres across the UK and thus we can compare an individual centre's composition (the types of businesses in the centre) with a hypothetical UK average centre. This is particularly useful if we wish to determine whether there are potential gaps in provision (under-representation) which could be targeted for inward investment should there be scope to do so.

Data are available on two Indices one for "outlets" and the other "floorspace" i.e. we can compare the numbers of businesses in centre in a particular centre to the UK average, and also the amount of floorspace in that sector. To get a full picture of where under-representation might indicate a gap in provision, we must consider both together, as for example there be fewer outlets in a sector than the UK average, but the floorspace is greater because the size of the outlet/s is relatively large.

Smaller centres will have a more limited role in terms of their role and function and thus fewer shops with a more limited variety. Richmond town centre which is a major centre with a sub-regional role will obviously have a greater and more diverse offer than one of the smaller district centres with a more local role.

Table 8: Under-represented sectors in Richmond town centre:

food retail	types of shops with no outlets in Richmond town centre:
	butchers, CTN, fishmongers, frozen foods, greengrocers, permanent market
	types of shops under-represented compared to UK average:
	bakers & confectioners score of 58 for outlets, convenience stores (44), off licence (60).
	Much of the food shopping in Richmond is provided by the **supermarkets** in the centre. Albeit that the number of outlets is below average (59), although less so in terms of the amount of supermarket floorspace (85).
non-food	types of shops with no outlets in Richmond town centre:
	catalogue showroom (closure of Argos to make way for Eton One development), gardens & equipment, (provided in part by Robert Dyas, and out of town development, musical instruments (however, Music Shop in Red Lion Street), office supplies, primarily second hand goods other than charity shops, sports (closure of JJB Sports in the Quadrant 2001), vehicle sales & accessories which may reflect demand for retail in the centre and relatively high rents
	types of shops under-represented compared to UK average:
	2 sectors are only slightly under-represented in terms of outlets: newsagents and stationers (not under-represented in terms of floorspace), music & video recordings Others less well-represented are: antiques (66), carpets and flooring (47), charity shops (33** the only centre where this is the case), chemist (23), clothing general (78), crafts, gifts etc (52), electrical and durable (18), florists (70), fitted furniture (66), and furniture (57), cards (32), hardware & household (54), textiles & soft furnishings (38), toys etc (60)
retail service	The retail service sector total figure for outlets is just below the UK average.
financial & business services	Some services which do not need a High Street location may well locate beyond the town centre boundary where rents are relatively high.

Data are for the immediate town centre as defined by Experian. They are the latest available. However, businesses will have opened and closed since surveyed.
Figure in brackets is the score comparing Richmond to the UK hypothetical town centre, in terms of outlets (not floorspace). To get a full picture of where under-representation might indicate a gap in provision, the amount of floorspace in that sector must also be considered and where worthy of note is referred to in the text. A score below 100 indicates under-representation. The lower the score, the further from the average.

The amount of floorspace in convenience retail has dropped slightly from 2005 by c. 280m2. The overall range of provision is largely similar, except for the CTN sector. There are a number of specialist food shops which are not represented in the centre. The overall pattern of representation is largely in line with what might be expected from a centre of this size and role and where there is demand for retail. Where non-food shopping is concerned there may be some scope for new retailers in under-represented sectors. Although of course the decision to open a business is a sophisticated one.

The picture is slightly different from the other centres in that there is under-representation of charity shops and chemists but above average provision of ladies & men's clothing etc again reflecting the role of the centre.

2.1 c) Multiple representation in Richmond town centre

Table 9: Multiple representation in Richmond town centre

	Jul-05				Apr-12			
	number of outlets	UK index	amount of floorspace ft2	UK index	number of outlets	GB index	amount of floorspace ft2	UK index
Total multiples	167		391,400		169		383,900	
comparison retail (non-food shopping)	81	97	184,800	93	77	105	171,300	92
convenience retail (food shopping including newsagents, shoe repairs, markets)	8	43	54,400	70	8	43	54,200	64
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	0	0	51,400	1224	12	71	16,000	83
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	47	129	100,800	141	46	140	95,700	162
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	31	118	0	0	26	96	46,700	135
% operated by a multiple	42.9		63.3		44.4		63.4	
% of **retail sector*4** operated by a multiple	46.4		71.9		50.6		73.0	

Source © copyright Experian

Notes: *1- A multiple has 9 or more outlets. All multiples included retail, retail service, leisure service & financial and business services
*2 - It is the difference between a percentage figure for the centre and the GB average.. Index of 100 = UK average, less than 100 indicates fewer multiples in terms of percentage than the average
*3 - Skewed by small number of outlets and by presence of multiples in chemist/beauty retail sales in large units.
*4 - comparison retail and convenience retail.

The latest data reveal that approaching half of units in the centre and two thirds of floorspace are operated by a multiple. This proportion has increased slightly since 2005. However, if we again compare Richmond to the hypothetical average UK town, of interest is that the percentage of comparison retailing operated by a multiple is just below the average, perhaps indicating a strong independent sector offer despite the size and role of the centre. Food shopping is primarily provided by the main supermarkets in Richmond. However, the hypothetical UK "average town" has over a fifth of its floorspace occupied by a multiple food retailer, where as this is only 14% in Richmond. This could be explained by out of centre provision in the locality.

Although the number of multiples selling comparison goods has dropped since 2005, in line with retailers wishing to concentrate provision in the largest centres (such as Kingston), this appears to reflect the UK picture.

Table 10: Multiple sector: comparison with other town centres in the borough

	2005	2011/ 2012*1	2012	
Town centre	multiple outlets		% operated by a multiple (outlets)	% of **retail sector***4 operated by a multiple (outlets)
Richmond	167	169	44.4	50.6
Twickenham	85	77	26.4	33.0
Teddington	48	50	27.0	25.7
East Sheen	48	52	23.2	23.5
Whitton	n/a	29	23.4	30.2
Barnes local centre	n/a	28	21.7	19.0

*1 Some centres last surveyed by GOAD in 2011 and some in 2012

Source: Experian GOAD Category Reports

Perhaps not surprisingly Richmond has by far the greatest number of multiples in the borough, this has in fact risen slightly.

2.1 d) Entertainment sector

Table 11: Entertainment sector: comparison of Richmond town centre with UK

		2005	2012
bars & wine bars	outlet count	9	9
	index	159	169
	floorspace (ft2)	21,700	20,400
	index	168	191
cafes	outlet count	23	27
	index	220	176
	floorspace (ft2)	21,600	23,500
	index	269	186
fast food & take away	outlet count	10	11
	index	55	54
	floorspace (ft2)	6,600	9,000
	index	48	58
public houses	outlet count	15	16
	index	115	147
	floorspace (ft2)	30,200	39,100
	index	110	171
restaurants	outlet count	36	29
	index	226	175
	floorspace (ft2)	54,000	45,300
	index	273	199
total leisure services*	outlet count	104	104
	index	133	125
	floorspace (ft2)	162,800	166,800
	index	121	122
survey date		04/02/2005	18/04/2012

Source: Experian GOAD. Copyright Experian GOAD 2012

See Notes to Tables above.

In terms of leisure provision as a whole, Richmond town centre is well-represented compared to the UK average, both in terms of the Index for outlets and floorspace. Whilst cafes and takeaways are under-represented almost all other uses are over-represented, notably bars and restaurants.

Borough perspective

Table 12: Amount of floorspace (converted to m2) in eating and drinking sectors in larger centres

	Twickenham	Richmond	East Sheen	Teddington	Whitton
bars & wine bars	177	1895	130	1394	0
cafes	1812	2183	873	2044	520
fast food & take away	1505	836	1013	632	316
public houses	3744	3633	641	1579	269
restaurants	3781	4209	2062	1905	251
total	11018	12756	4719	7553	1356
Survey date	2012	2012	2011	2011	2011

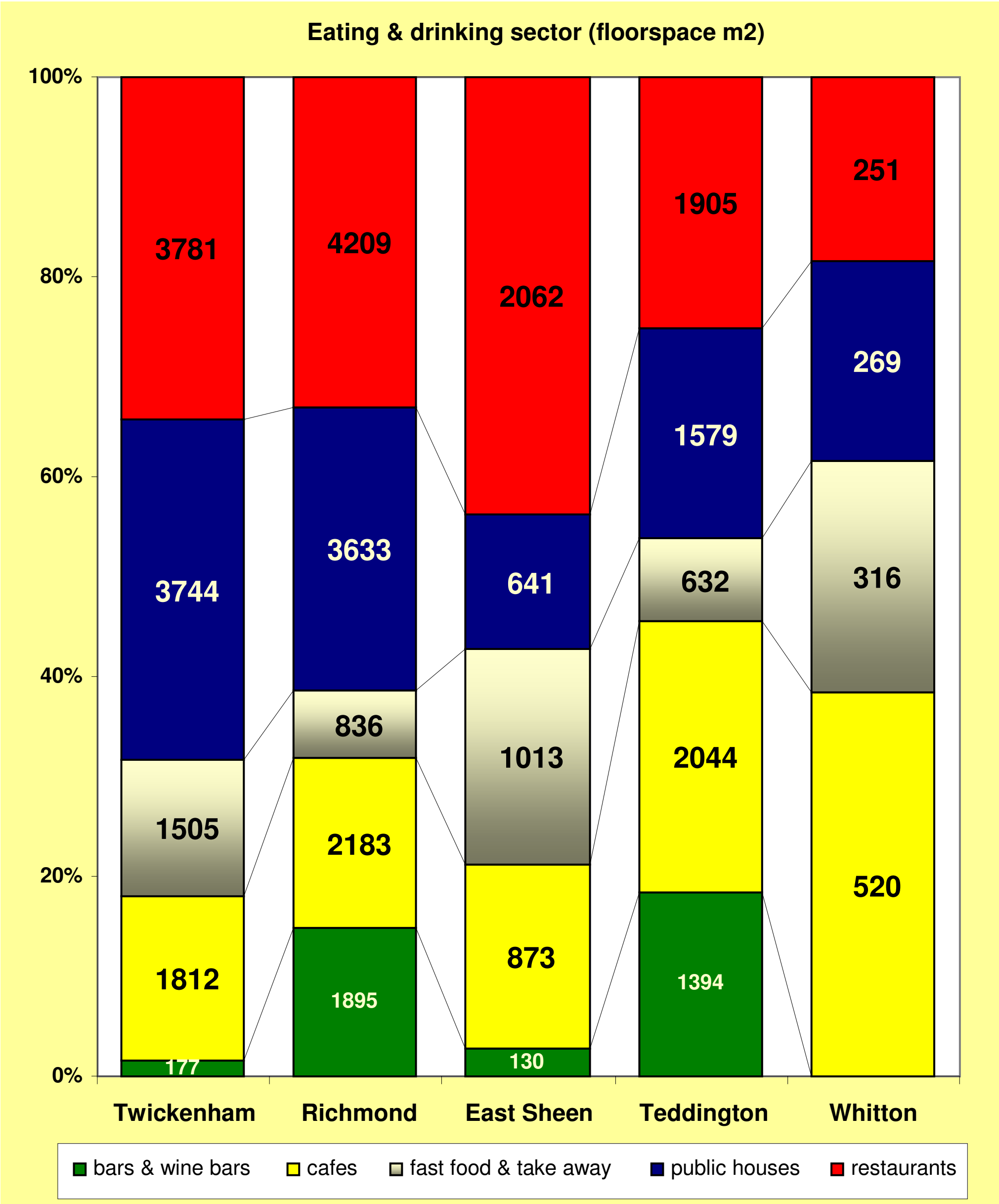
Source Experian GOAD category reports. © Experian GOAD.

There are clear differences between centres in the type of food and drink offer which has developed. As other data have shown, Twickenham and Richmond have the largest eating and drinking offer.

- Richmond and Teddington are the only centres where there is significant floorspace occupied by bars and wine bars.
- Twickenham, Richmond and Teddington have a similar amount of café space. Whitton has a great deal less space but it makes up most of its offer in this sector. Whitton is however, over-represented in terms of betting shops which are also part of its leisure offer.
- Teddington has a wider-based offer with a more even split between sectors, with the exception of less take-away floorspace.

- East Sheen's food and drink offer is essentially restaurant-based with just of 2,000m2 of restaurants floorspace. It does however, have c.1,000m2 of take-away space which with the exception of Twickenham is more than in the other larger centres.

Figure 2: Floorspace in eating and drinking sector



Source Experian GOAD Category reports. © Experian GOAD.

2.2 Vacancy rates

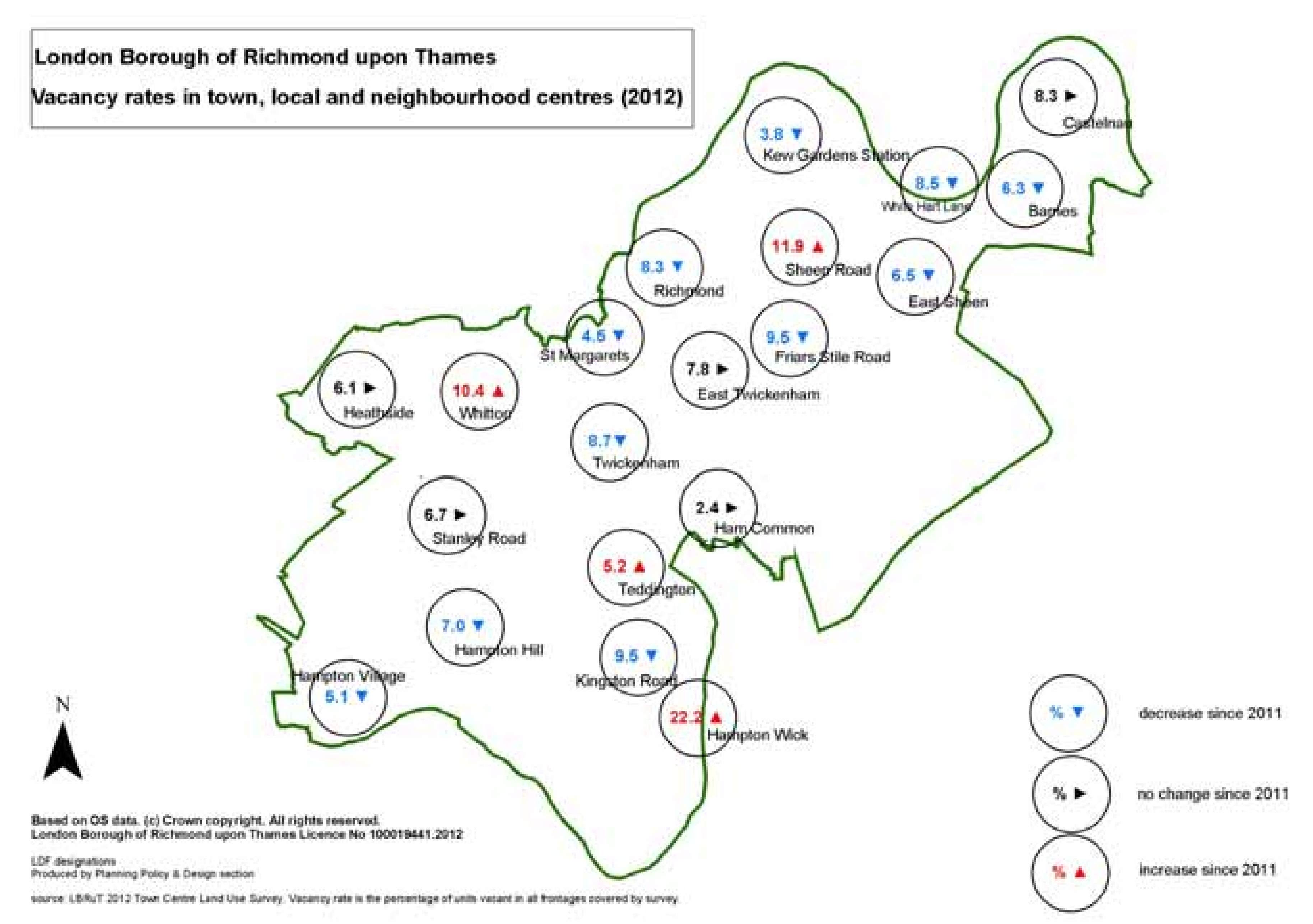
Table 13: Town centre vacancy rates 1999-2012

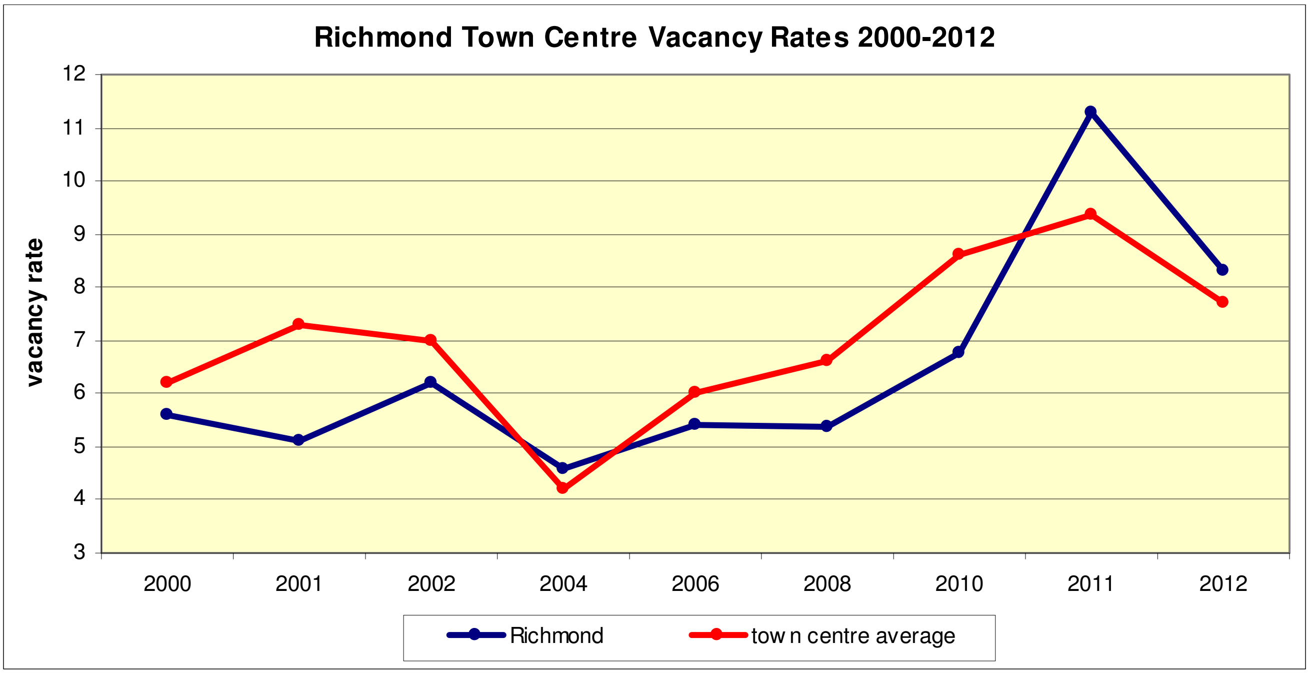
town centre	2000	2001	2002	2004	2006	2008	2010	2011	**2012**
Richmond	5.6	5.1	6.2	4.6	5.4	5.4	6.8	11.3	**8.3**
East Sheen	5.3	7.3	4.2	3.2	6.1	6.2	9.7	9.8	**6.5**
Teddington	7.1	8.6	9.6	3.6	8.2	4.2	6.8	4.1	**5.2**
Twickenham	7.1	6.6	7.7	4.3	4.7	7.7	9.3	10.0	**8.7**
Whitton	6.6	12.4	9.6	5.8	7.4	12.1	11.9	9.6	**10.4**
town centre average	6.2	7.3	7.0	4.2	6.0	6.6	8.6	9.4	**7.7**

Source: LBRuT Town Centre Land Use Surveys. Produced by Planning Policy Section.

Red indicates a reduction in the last year and **blue** an increase.

At 8.3% Richmond's vacancy rate is above the town centre average of 7.7%, albeit that there has been a fall since an unprecedented high in 2011. Rates have generally fluctuated below the town centre average since 2000.


London Borough of Richmond upon Thames
Vacancy rates in town, local and neighbourhood centres (2012)
8.3 ► Castelnau
3.8 ▼ Kew Gardens Station
8.5 ▼ White Hart Lane
6.3 ▼ Barnes
11.9 ▲ Sheen Road
8.3 ▼ Richmond
6.5 ▼ East Sheen
4.5 ▼ St Margarets
9.5 ▼ Friars Stile Road
7.8 ► East Twickenham
6.1 ► Heathside
10.4 ▲ Whitton
8.7 ▼ Twickenham
2.4 ► Ham Common
6.7 ► Stanley Road
5.2 ▲ Teddington
7.0 ▼ Hampton Hill
9.5 ▼ Kingston Road
Hampton Village
5.1 ▼
22.2 ▲ Hampton Wick
N
% ▼ decrease since 2011
% ► no change since 2011
% ▲ increase since 2011
Based on OS data. (c) Crown copyright. All rights reserved.
London Borough of Richmond upon Thames Licence No 100019441.2012
LDF designations
Produced by Planning Policy & Design section
source: LBRuT 2012 Town Centre Land Use Survey. Vacancy rate is the percentage of units vacant in all frontages covered by survey.



Source: LBRuT Town Centre Land Use Surveys. Produced by Planning Policy Section.

Long –term vacancies in Richmond

2012 Survey results suggest that there were 15 units which had been vacant for over 2 years. The redevelopment of the Lower George Street site as Eton One makes a contribution to this figure which would be brought down to 11 if they were considered one unit. If the latter figure is used some 3.2 % of units/outlets in Richmond are long-term vacants, which is just over a third of all vacancies.

Some of these units have been occupied since the summer, including one on Richmond Hill which had previously been vacant for over 10 years.

Table 14: Long term vacancies in Richmond town centre

Address		Use Class	Notes
1	Paved Court (SE side)	V(A1)	agent Franklin 08453903333. Web ref 1463. Last occupier Persian carpets 2006
31	The Quadrant (Richmond Station)	V(A1)	Last occupier - Phone shop 2007
13	Hill Rise (Western side)	VA1	Last occupier - antiques shop open intermittently. Permission granted for change of use to A3 in Aug 2012
55	Kew Road	VA1	Last occupier - Q sandwiches 2009.
18	Richmond Hill (NE side)	VA1	last occupied more than 10 years ago.
20	Richmond Hill (NE side)	VA1	last occupied more than 10 years ago.
9	Lichfield Terrace - Sheen Road	VA1	Last occupier - stationers 2009
9	The Quadrant (Western Side)	VA1	Last occupier - Early Learning Centre 2008
1	Midmoor House, Kew Road	VA3	Last occupier – 2007
57	Kew Road	VA3	Last occupier – 2008
5	Paradise Road	V-A3	Last occupier - 2004
1	Lower George Street (S side)	Redev	Scheme under construction for US Wholefoods
2	Lower George Street (S side)	Redev	
3	Lower George Street (S side)	Redev	
5	Lower George Street (S side)	Redev	

Source: LBRuT Town Centre Land Use Survey. Produced by Planning Policy Section. Long term vacancies are those which were vacant when the 2010, 2011 and 2012 Surveys were undertaken.

National comparators:
There are several sources for a national comparator, and some have different denominators. Perhaps the best regarded is Experian, which estimate a current UK vacancy rate of 13.77%[3]. The Local Data Company also estimate a national shop vacancy rate which is currently 14.4% (as reported in December 2012)[4].

Experian have created an index[5] whereby vacancy rates in individual towns can be compared to the UK "average town centre". A figure of less than 100 indicates a vacancy rate below the UK average. The latest information is included in the table below. However, the Council's Town Centre Land Use Survey 2012 will be the most up-to-date source for actual figures.

Table 15: Vacancy rates in centres: UK comparisons

centre	% vacancy rate (percentage of vacant outlets as a proportion of all outlets)	Experian GOAD Index	% vacancy rate Council Land Use Survey 2012 (data are more up to date than Experian GOAD)
Richmond	7.4	61	8.3
East Sheen	10.7	88	6.5
Teddington	4.3	36	5.2
Twickenham	7.5	62	8.7
Whitton	16.1	133	10.4
Barnes	11.6	96	6.3
Hampton Hill	9.4	78	7.0
Kew	2.0	16	3.8
St Margarets	5.0	41	4.5

Source Experian © copyright. Centres surveyed on rolling programme. Data are from 2011-12. .Fourth column source: LBRuT Town Centre land Use Surveys. Produced by Planning Policy Section

Council land use surveys are snapshot surveys undertaken in the Summer. Boundaries and methods may differ lightly between the two sources.

The only centre in the borough covered by Experian which has a vacancy rate above the UK average is Whitton. It was surveyed in May 2011 and since then more recent surveys show lower vacancy rates.

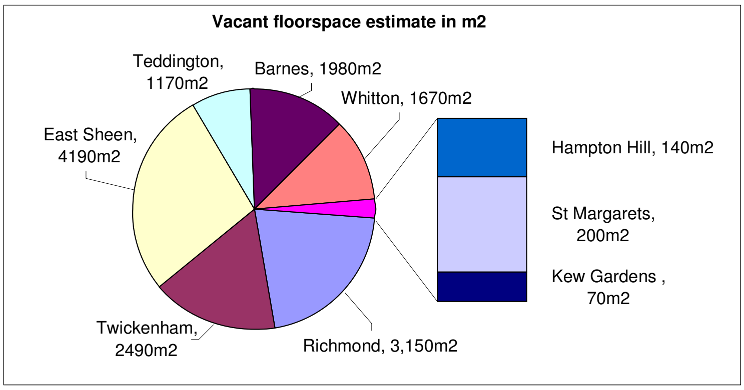
The borough figures compare well with the UK average. Averages for each type of centre in the borough's centre hierarchy are below the 14% figure, although there will be individual centres which are above this.

[3] Information supplied direct from Experian 15/1/2013.
[4] Denominator includes leisure. Vacancy analysis includes the top 650 town centres and over 1,900 shopping centres and retail parks.
[5] A simple indexing system illustrates the difference between a percentage for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over Comparing the number of vacant outlets with the GB average provides a useful insight into the current economic status of a centre. For example, a high index generally represents underdevelopment or decay, while a low index shows a strong retail presence.

2.2 (a) Vacant floorspace

Table 16: Vacant floorspace

vacant	estimate in m2
Richmond	3,149
Twickenham	2490
East Sheen	4190
Teddington	1171
Barnes	1979
Whitton	1672
Hampton Hill	136
St Margarets	214
Kew Gardens	65



Source: Experian GOAD Category Reports. © copyright Experian GOAD.

According to GOAD Data Richmond has just over 3,000m2 of vacant floorspace, more than any other town centre in the borough with the exception of East Sheen. However, UK comparison suggests the overall level is very low.

2.3 Comparing Richmond with the national picture – other benchmarking

Town Centre performance matrix

The Colliers International Town Performance Matrix is a unique benchmarking analysis which compares historical town performance with forecast future performance for 364 towns and cities across Great Britain. The matrix uses a range of data and generates 'historic' and 'future' performance scores have been calculated for each location.

Historic performance scores:	Future performance scores:
• Historic Change in Prime Zone A Retail Rents • Historic Change in Retail Provision (VenueScore) • Market Share (Strength of Competition) • Historic Change in 15 Minute Drivetime Population • Historic Change in JSA Claimant Count • Tourism	• Vacancy Rates • Number of Retailer Requirements • Estimated Future Market Share based on Shopping Centre Development Pipeline • Forecast Change in 15 Minute Drivetime Population • Forecast Change in Number of People in FTE Workplace Employment and % Public Sector Workers • Tourism • Out-of-Town A1 Shopping Park Developments in the Pipeline

Each of the 364 towns and cities can be classified as one of five performance categories. The Matrix has identified Richmond as **thriving**.

Table 17: Town Centre Performance Rating

Performance category	No of towns	Percentage of towns
Thriving	64	18%
Improving	71	20%
Stable	151	41%
Degenerating	38	10%
Failing	40	11%

Source: Colliers International, 2012

Centres at Risk and Venuescore

The Javelin Group published a paper[6] in April 2012 identifying a "threat level" in terms of remaining a successful centre, for more than 600 towns across Britain. Amongst the larger centres, Richmond is identified as amongst the "most robust category". Teddington, Twickenham and East Sheen are also identified in this category amongst smaller centres.

[6] Javelin Group – Battlefield Britain: Survivors & Casualties in the fight for the High Street, April 2012

This data provider also produces an index which ranks UK shopping venues based on their retail offer. Richmond is ranked 166 (2011) out of over 2,000 centre across the UK. It has improved its position from 2006, when it was ranked 166. Twickenham is ranked 456 (up from 737 in 2006). Whitton as a much smaller centre with a more local role is ranked 1,317, although it has also improved on its 2006 rank of 1,715.

2.4 Businesses seeking space in the borough

Information on businesses specifically seeking representation in the town centre available to the Council is limited. However, it has been suggested that information provided elsewhere on who is represented in the centre, along with identifying under-represented sectors can be as helpful as that included on the types of commercial databases where retailers specify which centres they are seeking representation. Some retailers may prefer not to use this method in part because of revealing competitive advantage, and others may identify a very large number of centres with very broad size requirements.

However, some information available from the South London Business (SLB) database reporting on requests for premises information suggest that Richmond received more requests for premises searches in the 2012 calendar year than any other centre in the borough (6284 which is 18.5%). However, it should be noted that the number of requests is fairly evenly distributed between the main areas in the borough which could mean that information is being requested more widely across the borough in the first instance. The total number of requests for Richmond (area specified by SLB) is similar to other nearby centres of Wimbledon, Sutton and Kingston, although fewer than for some centres in Lewisham and Bromley. Unfortunately, the data can not be broken down geographically and by area. 21% of requests for the whole area were for retail. However, it should be noted that the number of requests is fairly evenly distributed between the main areas in the borough which could mean that information is being requested more widely across the borough in the first instance.

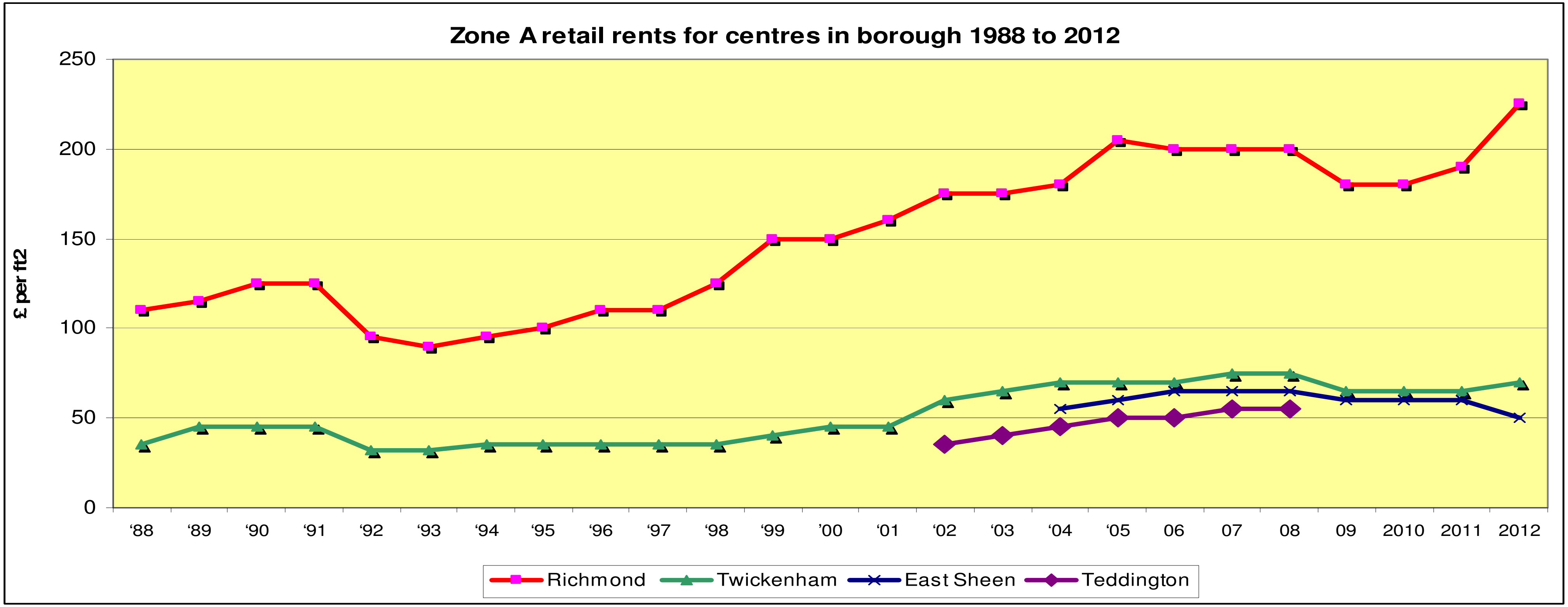
The borough in total received 9.6% of requests in the SLB area.

2.5 Demand: Prime Retail Rents

Table 18: Zone A rents (£ per ft2)

	Year																								
Centre	**‘88**	**‘89**	**‘90**	**‘91**	**‘92**	**‘93**	**‘94**	**‘95**	**‘96**	**‘97**	**‘98**	**‘99**	**’00**	**‘01**	**‘02**	**‘03**	**‘04**	**‘05**	**06**	**07**	**08**	**09**	**10**	**11**	**2012**
Richmond	110	115	125	125	95	90	95	100	110	110	125	150	150	160	175	175	180	205	200	200	200	180	180	190	**225**
Twickenham	35	45	45	45	32	32	35	35	35	35	35	40	45	45	60	65	70	70	70	75	75	65	65	65	70
East Sheen																	55	60	65	65	65	60	60	60	50
Teddington															35	40	45	50	50	55	55	n/a	n/a	n/a	n/a
Putney	75	85	90	90	60	55	50	50	60	65	70	80	80	80	95	100	100	100	110	110	105	85	90	110	110
Chiswick	50	60	60	65	60	60	60	60	60	65	65	75	85	85	120	130	130	135	135	135	140	130	130		
Kingston	150	170	170	165	160	160	160	160	165	200	255	260	260	250	260	275	275	295	305	310	310	275	275		

Notes: Zone A rents: Rental values relate to a hypothetical shop unit of optimum size and configuration in a prime pitch. Figures arrived at by adopting zone sizes standard for the location.
Blank cells appear for years where no data are available.



Source: Colliers International. © copyright Colliers International.

Colliers International have produced retail rent data[7] for the larger towns across the country for many years. There is a full dataset for Twickenham and Richmond, but not for the smaller centres. The long term trend for Richmond is a steady increase. More recently prime rents have begun to rise again, and in 2012 reached a peak of £225/ft2.

Richmond has outperformed similar centres for years and currently has a zone A rent significantly higher than the national average for 2011 (The average prime retail rent in Great Britain now stands at **£110 psf Zone A**, down 14.5% from the peak of £128 psf recorded in 2008.) **Therefore, Richmond's Zone A rents are rising against the national trend and are more than double the national average, as well as being higher than other nearby higher order centres.**

Table 19: Recent Zone A rents in neighbouring centres:

Major centres	2011	2012	Y/Y%
Richmond	190	**225**	**18.4**
Wandsworth	115	120	4.3
Metropolitan centres: (higher order)			
Ealing	110	110	0.0
Hounslow	90	75	-16.7

Source: Colliers International

Richmond outperforms centres in neighbouring boroughs which are also classified by the GLA as a "major" centre in the Mayor's Town Centre Network, and also other higher order centres such as Ealing and Hounslow, but not Kingston, where the majority of borough residents buy their comparison goods.

Anecdotal information on rents

Roger Tym & Partners held discussions with local agents as background to work commissioned by the Council on the Community Infrastructure Levy, published in October 2012[8]. In relation to Richmond they concluded that the high levels of demand from retailers were reflected in the rents which are *more than* double the rental levels achieved within Twickenham district centre.

However, local agents confirmed that rents have been pushed up high in recent years due to rent reviews. Some retailers are now struggling to pay the rent as a result of the downturn in the market and there is likely to be some re-adjustment which is already starting to occur. For example, Fat Face vacated their unit and Monsoon is now closing its Richmond store with a view to its existing unit in Kingston - Richmond's main competing centre - picking up trade. Local agents have advised that in terms of the market within the town centre, when units do become available, premises do not remain on the market for very long.

Zone A Rents within Richmond town centre do vary widely depending upon location and footfall which is typical of most town centres. Zone A rents are in the region of £2,368-£2,475 per sq.m. (£220 - £230 per sq.ft). Zone A rents on George Street, the prime retail pitch, are currently in the order of £2,583-£2,691 per sq.m. (£240-£250 per sq.ft). The rental levels then drop off from this prime location. For example, at the Quadrant rental levels are in the region of £1,615 per sq.m. (£150 per sq.ft) and Hill Street £1,076-£1,292 per sq.m (£100 - £120 per sq.ft).

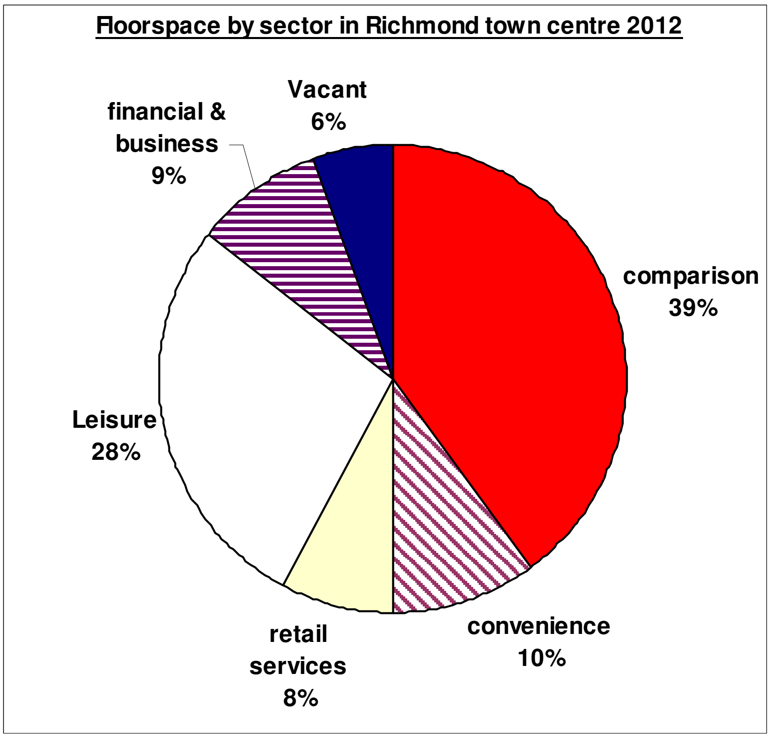
1 Eton Street in Richmond has been let to US Wholefoods on a new 20 year lease subject to 5 yearly upward only rent reviews at a rent of £377 per sq.m. (£35.00 per sq.ft).

Anecdotal information provided by local agents in July 2012 suggests that Zone A rents have dropped recently and that landlords may well be holding out for higher rents. The Lanes were considered to always do well with average rents of about £25-28,000 a year.

[7] Rental values relate to a hypothetical shop unit of optimum size and configuration in a prime pitch. Figures arrived at by adopting zone sizes standard for the location.

[8] http://www.richmond.gov.uk/cil_viability_study_report_incl_appendices.pdf

2.6 Floorspace

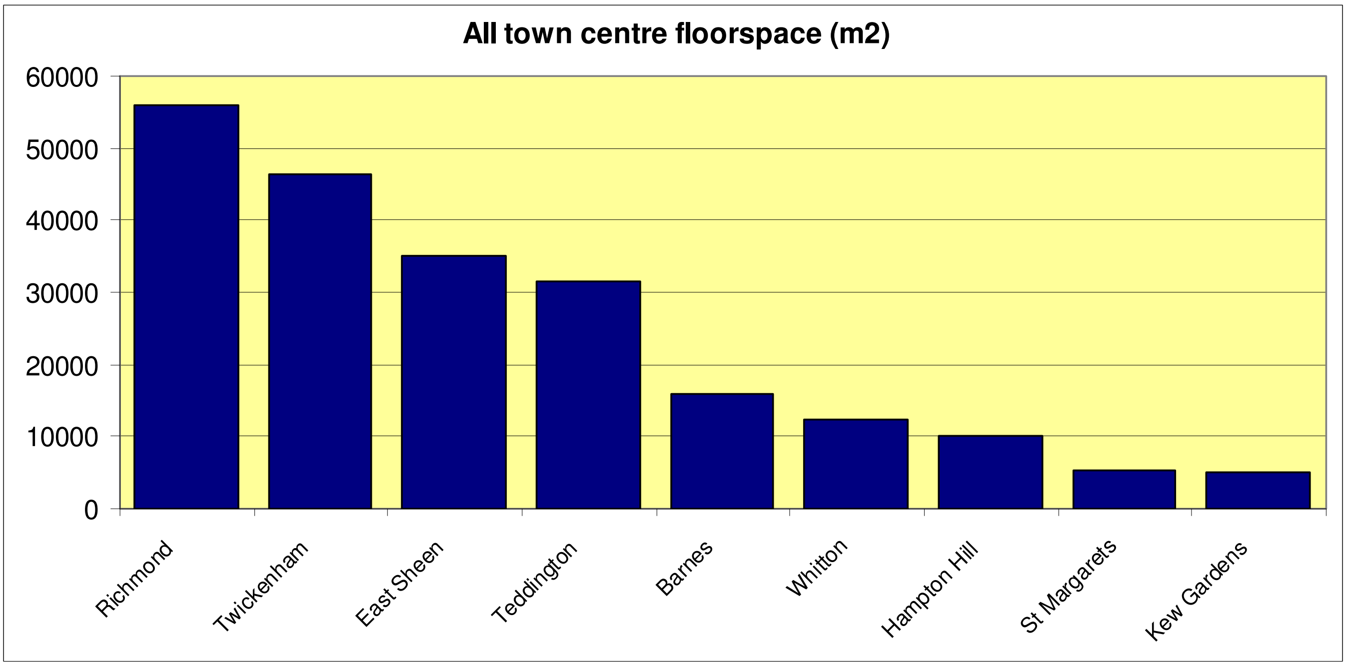


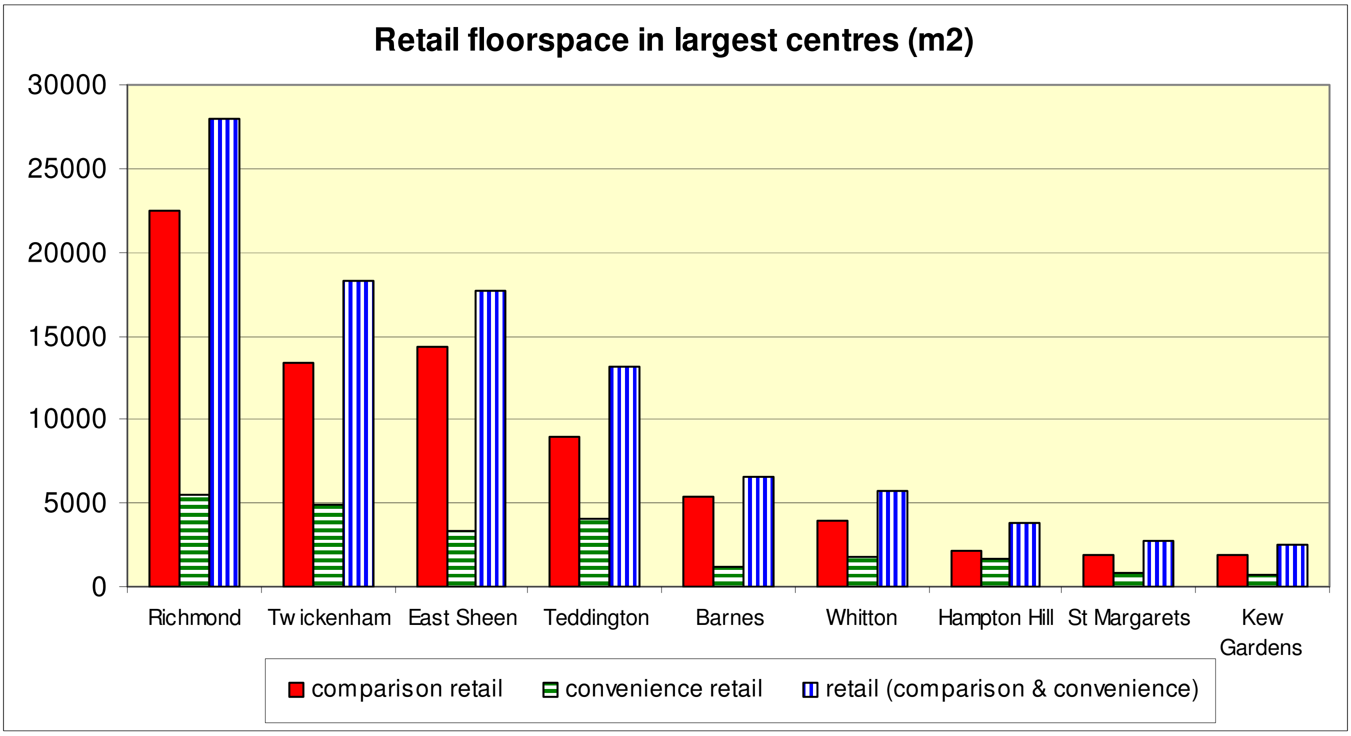
Floorspace data provided by Experian GOAD adds to the picture of the make-up of the centre. It clearly shows the significance of comparison (non-food) shopping (39%), and also the importance of the leisure sector which is 28% of the total. Not unsurprisingly Richmond has more floorspace than the other borough centres (c. 56,000m2), of which half is retail floorspace. 80% of this shopping floorspace is non-food which is high on a borough-wide basis.

Table 20: Retail floorspace in larger centres in the borough m2

	comparison retail	convenience retail	retail (comparison & convenience)
Richmond	22427	5546	27973
Twickenham	13406	4933	18339
East Sheen	14372	3307	17679
Teddington	8993	4097	13090
Barnes	5323	1226	6550
Whitton	3976	1812	5788
Hampton Hill	2127	1644	3772
St Margarets	1932	836	2769
Kew Gardens	1877	678	2555

Source Experian GOAD Category Reports. © copyright Experian





Source Experian GOAD Category Reports. © copyright Experian

2.7 Employment in town centres

South Richmond ward is not a perfect fit with the town centre boundary but is adequate for the consideration of the employment statistics. Workforce data have not yet been released for the 2011 Census. In 2001 there was an estimated 12,200 comprising the daytime population in this ward, which is more than other town centres in the borough. The daytime population consists of those who work in the area and those who live in the area but do not work.

Table 21: Daytime populations in wards which bestfit with town centre boundaries.

Town centre (best fit with ward)	Number of people
Richmond	12,200
Twickenham	8,700
Teddington	8,300
East Sheen	5,300
Whitton	3,900
Barnes	5,000

Source 2001 Census. © Crown Copyright

2.8 Footfall

Pedestrian flows counts were undertaken at 10 monitoring sites across the centre in September 2012, updating counts undertaken in 2000 and 2006. 10 minute counts were taken at each of the 10 sites which were then factored up to represent an estimated hourly rate. The map below shows the location of the sites and identifies the estimated count at the lunchtime peak. Table 22 on the following page presents the data in full.

Table 22: Estimated pedestrian flowcounts in Richmond town centre 1997, 2000, 2006 & 2012

		2012				2006				2000				1997			
Premises Name	Address	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.
(1) Richmond Hill Gallery	26 Richmond Hill	**72**	**90**	**132**	96	102	180	204	**72**	**96**	162	126	120				
(2) Adesso (restaurant)	24 Hill Rise	156	312	270	366	156	312	312	246	138	402	300	222	252	528	438	210
(3) Moss Bros	15 Hill Street	306	612	330	330	276	564	414	420	228	822	360	258	348	672	414	306
(4) Taste of Gujarat	12 Red Lion Street	114	174	108	**84**	102	192	312	126	180	390	138	168	**150**	300	198	150
(5) Dickens & Jones	75-81 George St	408	768	354	228	456	1224	690	348	606	1116	534	348	462	1200	906	300
(6) Marks & Spencer	13 George Street	564	1476	1110	768	1260	2418	1362	672	1398	2568	1626	732	948	2706	1656	462
(7) Calvin Klein	1 The Quadrant	456	996	726	396	888	1746	1002	588	624	1632	966	498	660	1848	1020	378
(8) Waitrose	2-4 Sheen Lane	444	978	774	774	558	690	660	336	702	1314	1086	534	606	816	1320	492
(9) BR station	Kew Road	1170	1116	**1902**	1662	1392	1086	**1716**	1698	816	1698	1968	2370	1074	1380	1476	1350
(10) Orange Tree PH	45 Kew Road	288	330	408	378	186	678	468	288	324	528	390	222	198	318	240	204

Source LBRuT Planning Policy Team. Survey date: Tuesday 25th Sept 2012

Weather conditions 2012: Sunny but cold.

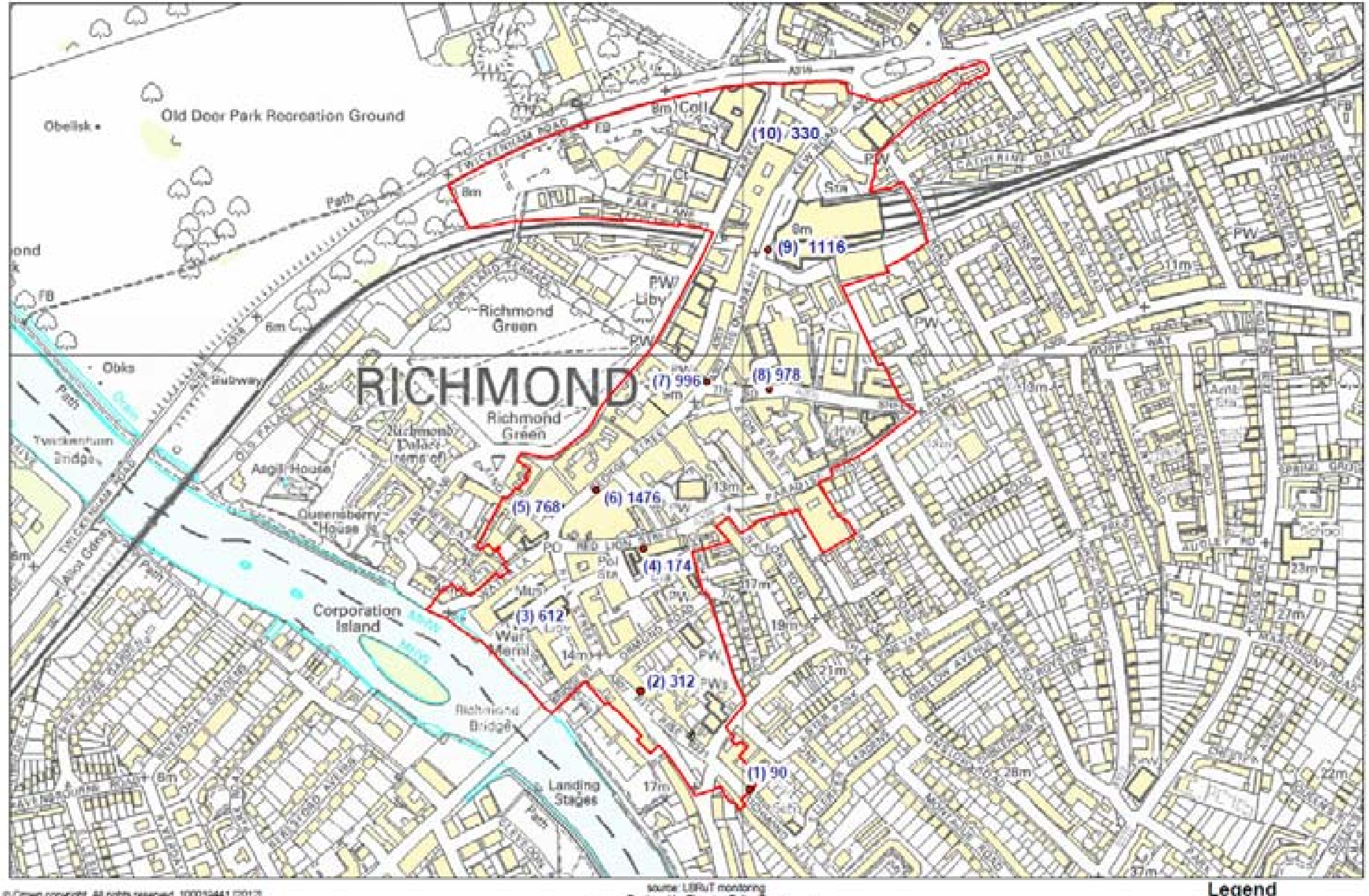
Notes - Figures are extrapolated from 10 minute counts.

Red indicates the highest counts at each session, and blue the lowest.

The lowest count recorded in September 2012 was 72 persons per hour during the 10 to 11 am slot outside the Richmond Hill Gallery, on Richmond Hill, whereas the highest was recorded between 4pm and 5pm at the BR Station, and the second highest at the same point later in the evening between 7 and 8pm. This confirms that commuters account for significant amounts of footfall, although clearly, those using the station are not necessarily using the centre. The field researcher observed that there were relatively few shops open after 7pm on a weekday, despite footfall remaining high, including some of the major retailers such as Marks and Spencer, Boots, and House of Fraser. Over the years the monitoring points with the highest footfall have consistently been the station or Marks and Spencer on George Street. With the exception of 1997 where the lowest counts were recorded on Red Lion Street, (and prior to monitoring on Richmond Hill began), the Richmond Hill site has consistently recorded the lowest pedestrian counts. Changes to designated frontages have been made to allow for greater diversity of use in this area, which already appears to be seeing results with the opening of a new coffee shop. Therefore the picture remains essentially the same. It confirms the importance of the supermarkets in the centre, especially at lunch time, and also the business of the site at 1, The Quadrant, which is located near a crossing.

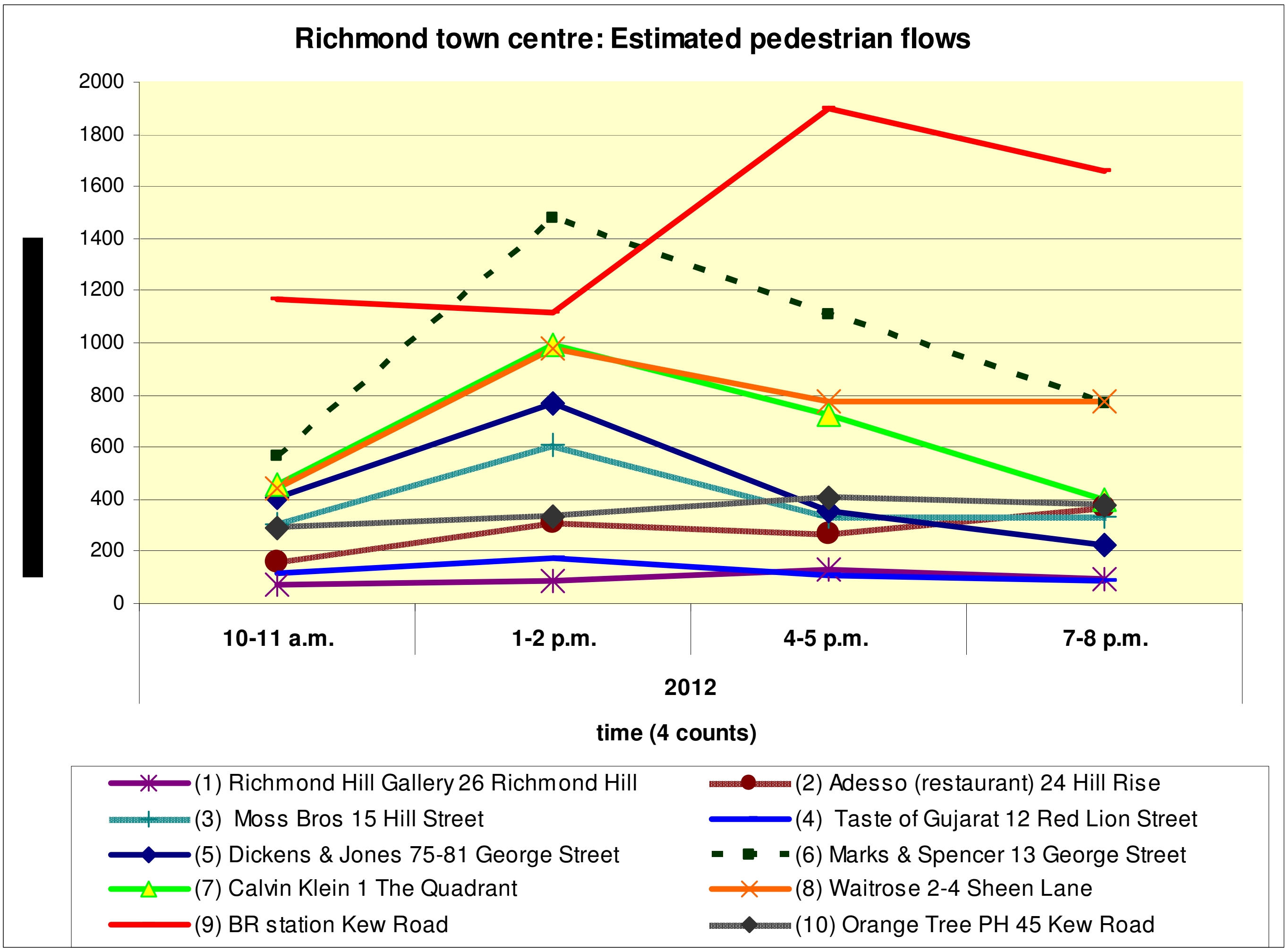
In general, the latest estimated figures are lower than in earlier years.

Pedestrian flowcounts in Richmond town centre (estimated hourly flows 1 to 2 pm) Sept 2012

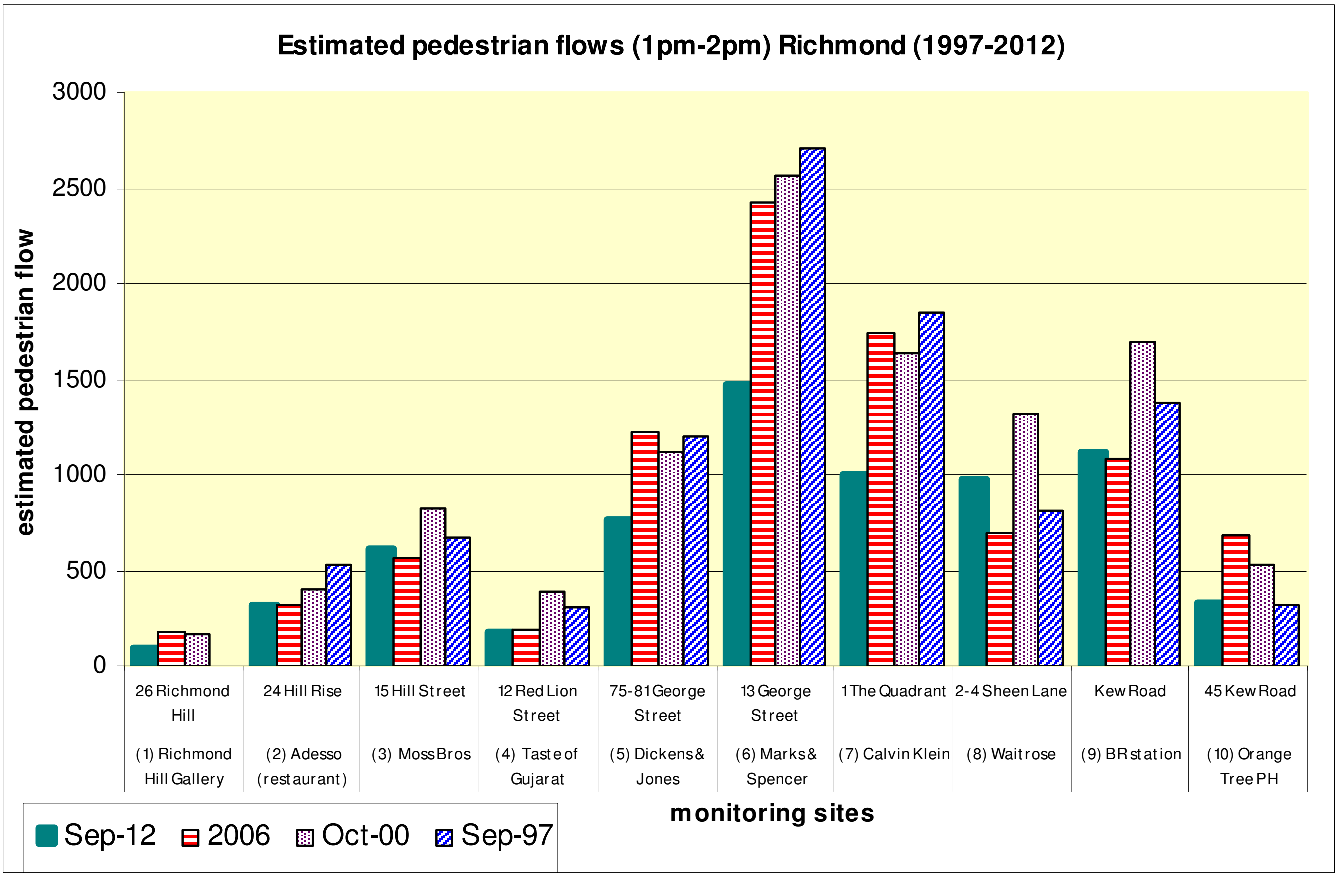


source: LBRuT monitoring
Produced by Planning Policy Team
Contact: Fiona O'Toole, f.o'toole@richmond.gov.uk

Legend
Borough boundary



Source: LBRuT monitoring. Planning Policy Section



Source: LBRuT monitoring. Planning Policy Section

Overall level of footfall in all centres

An average count has been calculated as an approximate basis for estimating whether there has been change since the last monitoring in 2006. It revealed that in most centres footfall has fallen between 2000 and 2011 (Twickenham) /2012 (other centres), with the exception of Teddington & Whitton where the average footfall count is similar. Using this rough tool, Richmond's average footfall figure has fallen the most, by 20%, Twickenham and East Sheen's by approximately 10%. Richmond was the only centre where inclement weather conditions were recorded.

Evening counts:

Not surprisingly counts taken in the evening between 7pm and 8pm are significantly lower than the lunchtime count (1pm to 2pm). The figures range from 25% lower in Richmond to 49% lower in Teddington. The remaining centres were lower by approximately a third.

Peak pedestrian flow in the evening in the Borough centres is strongly influenced by the location of BR stations (where one exists) and by major supermarkets. This is not perhaps surprising as commuters pick up top-up shopping. It could be there are opportunities for retailers to open later in some centres, such as Richmond to catch commuters. Perhaps surprisingly if an average is taken of the evening counts, it reveals that Richmond has the lowest pedestrian flow of any centre at this time of day. However, peak figures are not the lowest and there are a couple of sites where footfall was very low, which skews the figures. In addition, although all counts were undertaken mid week, and as mentioned above, Richmond was the only centre where inclement weather conditions were recorded.

2.9 Accessibility & parking

Table 23: Bus Routes – Richmond town centre

	number of buses per hour							**List of key centres passed through**
	Monday to Friday			Saturday		Sunday		
Service Number	Peak	Off peak	Eves	Day	Eves	Day	Eves	
H22	5	5	3	5	3	3	3	Hounslow, Whitton, Twickenham, Richmond.
H37	9	8	7	10	7	7	7	Richmond, Hounslow
R68	4	4	3	4	3	4	3	Hampton Court, Teddington, Twickenham, Richmond
R70	6	6	5	6	3	3	3	Richmond, Twickenham
33	7	7	4	7	6	7	4	Hammersmith, East Sheen, Richmond, Twickenham, Teddington
65	8	8	4	7	5	6	5	Ealing, Richmond, Kingston
190	4	4	3	4	3	3	3	Hammersmith, Chiswick, Richmond
337	5	5	4	5	4	4	4	Putney, East Sheen, Richmond
371	7	7	4	7	4	5	4	Kingston, Richmond
391	6	5	5	6	5	5	5	Hammersmith, Richmond
419	4	4	2	4	2	2	2	Richmond, Hammersmith
490	5	5	3	5	3	3	3	Richmond, Twickenham
493	5	5	3	5	3	3	3	Richmond, East Sheen, Roehampton, Wimbledon, Tooting,

Source: LBRUT Transport
Notes * = Buses on route 33 run more frequently between Richmond and Hammersmith at the times indicated

Table 24: Train Routes – Richmond town centre

Richmond	Trains per hour
from Windsor & Eton Riverside	2
from Reading	2
London Waterloo loop (via Kingston)	2
London Waterloo loop (via Hounslow)	2
Overland services to North and East London	2
District Line underground services from Richmond	8
Total number of trains and underground services arriving at Richmond	***18***

Source LBRuT Transport

Much of the town centre is covered by a PTAL level of 25 which is very good/ excellent. There are 18 trains an hour passing through Richmond BR station and 13 bus routes.

Table 25: Richmond town centre car park capacity

Old Deer Park	Operated by Council. Max stay 6 hours during operational hours	285 cars, 1 motorcycle, 1 coach
Old Deer Park extension	Operated by Council. Max stay 4 hours during operational hours	162 cars, 2 disabled
Pools on the Park	Operated by Council. Max stay 4 hours during operational hours	150 cars, 2 disabled
Friars Lane (until redevelopment)	Operated by Council. Max stay 4 hours, during operational hours	63 cars, 1 motorcycle
Richmond Riverside	2 hours between 8:00am to 6:00pm period Saturday and Sunday	78 cars
Paradise Road multi-storey	Max stay 24 hours	337 cars, 4 disabled
Waitrose, Sheen Road	Day rates available	221
The Quadrant multi-storey	NCP. No max stay	426 (3 disabled)
Sheen Road, rear of Wilton Court	Richmond Parking n/a	n/a (limited)
Kew Foot Road	Richmond Parking n/a. 24 hours	n/a
Richmond station		55 cars

Source: LBRUT Transport Section, and other

As might be expected, the borough's largest centre has considerably more car parking than any of the district centres in the borough. The larger car parks in the centre include the Old Deer Park and Extension and Pools on the Park. Multi-storey car parks can be found on Paradise Road and the Quadrant and together have 763 spaces. Additional parking for qualifying customers (minimum spend & time-limited) is available at Waitrose, Sheen Lane. No recent data on car park occupancy is currently available.

Details of the Council's car parks are available on the internet[9].

2.10 Customer and resident's views

The Council's All in One Consultation was undertaken in November 2010 and followed up with a series of local events. The full results for this area can be viewed on the Council's website using the following link: http://www.richmond.gov.uk/richmonda4.pdf.

Key results are:

What was important to respondents:

Overwhelmingly, local parks and open spaces were considered to be the most important aspect in making the area a good place to live (76%). The next most important was the level of crime and anti-social behaviour (40%).

[9] http://www.richmond.gov.uk/home/transport_and_streets/parking/car_parks/content-parking_richmond_area_car_parks.htm

This was followed by access to good public transport (36%), **shopping in your local high street (34%)** and provision and/or quality of entertainment, museums and arts (22%).

What could be improved:

Traffic and levels of congestion was the top priority for improvement in Richmond (39%), compared with the overall Borough result (34%), 5.6% above the Borough average.

Following this, you felt that condition of pavements (30%), provision of parking (22%) and affordability of local housing (19%), could be improved.

- Finally condition of roads (18%) and the amount of litter and street cleanliness (17%) were also key things you felt could be improved.

There were 1,572 responses in this area.

2.11 Perception of safety and occurrence of crime

(a) Research on antisocial behaviour to inform Licensing policies

In 2011 Makes Associates updated earlier research on anti-social behaviour initially commissioned to inform the development of the Council's Licensing Policy. The Study collected observational data on incidents of ASB for Richmond and Twickenham town centres.
For Richmond town centre the conclusions were:

- Overall there was a continuation of the falls in crime and nuisance in Richmond in 2011 that were seen in 2009 and 2007.
- In 2011 the number incidents had fallen from 2005 levels of 451 to 334. This is a six year decrease of 26%.
- Between 2009 and 2011 this decrease figure was 11%.
- Using pedestrian flows as a relative, rather than absolute measure, Richmond had 1 incident for every 25 people counted in 2011, about the same as 2005. (This was higher than the 1:31 ratio achieved in 2009). This is disappointing because it suggests that the large falls in user numbers (29%) in 2011 in Richmond town centre has not led to commensurately large falls in incident numbers.
- The main change in 2011 regarding the 'timing' of incidents is an overall smoothing of incidents during the course of the night. There are no longer late peaks of problems around 01:00hrs and 02:00hrs, although a small peak has emerged around 23:00hrs to 23:30hrs (traditional pub closing).
- In terms of 'type' of incident, as per all previous studies, littering and rowdiness remain the main problems. But in particular rowdiness is notably lower than 2009.
- In terms of location, the Station remains the hotspot in Richmond, although this area has also seen the greatest falls in incidents between 2009 and 2011.
- The Green and Riverside have also seen notable falls in problems.
- The likelihood is that the change of what was Edward's (and then The Bull - which were both alcohol-led 'vertical drinking' venues) into 1 Kew Road in 2010 (which is a food-led 'gastro pub') has had a positive impact on the Station area.
- Likewise, 'Vodka Revolution' is now the venue that has the most individual incidents linked to its clientele.

(b) Anti Social Behaviour (ASB) levels

Data on Anti Social Behaviour levels reported to the Council for the period 2011-12 are available for the main town centre wards. ASB is gathered every month from three council databases which makes amalgamating data more difficult. The data provided covers 80% of the ASB total for the year.

Key facts for the borough as a whole:

- There were 5272 reports of ASB during 2011-12, the vast majority of these reports concern littering issues, including fly tipping.
- ASB levels were 4% down on the previous financial year of 2010-11.
- There has been an average of 439 ASB calls/reports a month during 2011-12.
- The main wards for ASB were Ham, South Richmond and Mortlake.
- Most ASB incidents in the borough occur between 2000-0000 hrs, usually on the weekends.

ASB reporting in the borough is based on perception and is therefore subjective. Reporting to the Council is primarily "Environmental ASB", where the issue is with a physical location rather than with people. Reports concerning the later are usually addressed directly to the Police. "Environmental ASB" includes littering and fly tipping. However one-fifth of calls related to Noise, which is nine times out of ten an issue with human interaction and tolerance levels.

Of the three main ASB categories[10], barely 1% of council ASB calls/reports fall under the most serious category Level One (Personal). Around 14% of calls fall under Level Two (Nuisance) and 85% of calls/reports fall under the least serious category Level Three (Environmental).

Table 26: ASB Reporting in Richmond 2011/12

Centre	Number of ASB reports in centre	Environs*1	% ASB taking place in centre	ASB Level
Barnes	42	182	22%	Low
Whitton	42	137	31%	Low
East Sheen	127	288	44%	Medium
Teddington	62	240	26%	Low
Twickenham	219	390	59%	Medium-High
Richmond	276	471	59%	Medium-High

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Notes *1 = covers the area around the main town centres, which is not the entire ward, as defined by the Community Safety Data Analyst

All levels of ASB reported to the Council are quoted are relative to the borough and not pan-London. If these town centres were compared to local town centres such as Kingston, Hounslow or Hammersmith, they would all be classified as Low.

Map of ASB calls/ incidents in Richmond town centre area 2011/12

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Notes
1. These maps are a pictorial illustration and do not show all the ASB recorded in the total figure. Ward level identification has been used when mapping co-ordinates are not available. The green circle indicates the ASB hotspot.

Key findings:
- Richmond Town Centre has a variety of ASB types, as opposed to the smaller town centres.
- There were 276 reports of ASB in Richmond town centre during 2011-12, which is an average of 23 calls/reports per month.
- The main type of ASB reported was Litter, closely followed by Noise

[10] Personal : 'Personal' is designed to identify ASB incidents that the caller, call-handler or anyone else perceives as either deliberately targeted at an individual or group or having an impact on an individual or group rather than the community at large.
Nuisance: 'Nuisance' captures those incidents where an act, condition, thing or person causes trouble, annoyance, inconvenience, offence or suffering to the local community in general rather than to individual victims
Environmental: 'Environmental' deals with the interface between people and places. It includes incidents where individuals and groups have an impact on their surroundings including natural, built and social environments.

- There were 471 ASB reports in the wider area surrounding the centre during 2011-12, therefore 59 % of all ASB is recorded as having taken place in the centre itself. This is high compared to other centres (see Table), with the exception of Twickenham, both have well-developed evening economies.
- Richmond Town Centre has medium to high levels of ASB, although as with all other town centres, the report categories fall mainly into the lowest classification.
- It would be classified as Medium to High in terms of Environmental/Nuisance in a regional context.

Levels of reported complaints about ASB in Richmond made to the Council are significantly lower than the ASB levels recorded in the MAKE Report made via observation in the field.

(b) Crime levels in town centre wards

The following table shows crime levels for the main wards linked to the town centres, where the town centre is more than 75% contained in a ward boundary. It reflects the trends and emerging crime situation in the vicinity of these areas.

The following tables compares the “Volume Crimes”, those which are most prolific, for 3 wards which encompass Teddington, Twickenham and Richmond town centres. They are the crimes which are typical to town centre locations and which are most prolific in the borough.

Crime which is Violence Against the Person has seen a rise across the London boroughs due to changes in recording, which would explain why every town centre ward has shown an increase on this table.

Table 27: Crime levels in selected town centre wards

	violence against the person			theft & handling			total crime		
Ward	Q1 2011/12	Q1 2012/13	Change	Q1 2011/12	Q1 2012/13	Change	Q1 2011/12	Q1 2012/13	Change
Teddington	15	20	5	74	49	-25	144	129	-15
Twickenham Riverside	40	44	4	75	95	20	197	211	14
South Richmond	53	67	14	193	205	12	356	389	33

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Crime Summary

There has been a 2% increase in crime between 2010/11 and 2011/12. Therefore, the borough became the fourth safest in March 2012, whereas it was the safest borough in Jan 2011. Crime levels are still very low in Richmond compared to London and especially some of the neighbouring boroughs, so any fairly small increase in crime numbers can have a slightly disproportionate effect. As of Q1 2012/13, the borough is the seventh safest in London, placed 26th out of 32 boroughs.

c) Do centres **feel** safe?

As well as reporting of ASB and actual crime, the fear of crime is another issue for town centres as it may prohibit their use by some.

The Retail Study (GVA Grimley 2006) included a telephone survey of 1,000 households in the borough. It should be noted that the survey is of residents and not visitors. Please note sample sizes are small. Respondents were also asked if they felt unsafe in any centres they visited in the evening, and whether they regularly encountered crime or anti- social behaviour.

Table 28: Centres considered unsafe in the evening and after dark and those where crime etc regularly encountered

Are there any centres in the borough where you feel unsafe during the evening or after dark ?			
	number	percentage of all responses	percentage of all who specified a centre
(None / don't go out after dark / don't know)	652	57.6	
Kingston	108	9.5	22.5
Richmond	81	7.2	16.9
Twickenham	65	5.7	13.5
Hounslow	43	3.8	9.0
Everywhere	21	1.9	4.4
Hanworth	14	1.2	2.9
Hammersmith	12	1.1	2.5
Barnes	10	0.9	2.1
Putney	10	0.9	2.1
Brentford	9	0.8	1.9
Isleworth	9	0.8	1.9
Wandsworth	9	0.8	1.9
Whitton	9	0.8	1.9
East Sheen	8	0.7	1.7
Feltham	8	0.7	1.7
Other	7	0.6	1.5
Hampton	6	0.5	1.3
Teddington	6	0.5	1.3
Brixton	5	0.4	1.0
Chiswick	5	0.4	1.0
Fulham	5	0.4	1.0
Kew	5	0.4	1.0
Osterley	5	0.4	1.0
Roehampton	5	0.4	1.0
Central London	3	0.3	0.6
Ham	3	0.3	0.6
Staines	3	0.3	0.6
Sunbury	3	0.3	0.6
Wimbledon	2	0.2	0.4
Southfields	1	0.1	0.2
Total	1132		

Source: GVA Grimley Retail Study Household Survey 2005
Respondents could indicate more than one centre

The majority of respondents either do not go out after dark or do not feel unsafe. However, due to the coding of the question it is not possible to distinguish between the two which could have been significant. Of those who identified a centre, 16% identified Richmond and 13.5% identified Twickenham as an area where they felt unsafe in the evening or after dark, Kingston being top of the list.

(c) Use of centre in evening

The following table shows those centres identified by respondents[11] as most often visited for restaurants, and also for bars and nightclubs. It shows that in particular Richmond, and also Teddington and Twickenham are significant eating and drinking destinations for local residents. It also reveals the importance on Teddington as a restaurant location.

[11] Household survey included in GVA Grimley Retail Study

Table 29: Use of centres for restaurants and bars/nightclubs

What town centre do you visit most often for restaurants ?		
	Number	percentage
Richmond	217	25.9
Teddington	91	10.9
Central London	89	10.6
Twickenham	80	9.5
Kingston	79	9.4
Putney	47	5.6
Barnes	35	4.2
East Sheen	32	3.8
Varies / no pattern	31	3.7
Other	30	3.6
Kew	24	2.9
Hampton	20	2.4
Wimbledon	12	1.4
East Molesey	11	1.3
Chiswick	8	1.0
Sunbury	8	1.0
Staines	7	0.8
Hounslow	6	0.7
Whitton	5	0.6
Hammersmith	3	0.4
Hanworth	2	0.2
Isleworth	1	0.1
Total	838	

What town centre do you visit most often for bars/nightclubs ?		
	Number	percentage
Richmond	117	26.8
Central London	68	15.6
Kingston	62	14.2
Twickenham	49	11.2
Teddington	27	6.2
Putney	25	5.7
Other	24	5.5
Varies / no pattern	17	3.9
Barnes	9	2.1
East Sheen	8	1.8
Hampton	7	1.6
East Molesey	5	1.1
Hammersmith	4	0.9
Kew	3	0.7
Wimbledon	3	0.7
Fulham	2	0.5
Hounslow	2	0.5
Chiswick	1	0.2
Hanworth	1	0.2
Roehampton	1	0.2
Whitton	1	0.2
Total	436	

Source: GVA Grimley Retail Study Household Survey 2005
Those who indicated that they did not visit restaurants of bars are excluded.

2.12 State of the town centre: environmental quality

The Council has undertaken a study looking at the environmental quality of each of the centres covered by this report. It uses a standard proforma developed by officers and is published separately in full. The following paragraphs are a summary of the analysis.

Overall, Richmond town centre has a number of open spaces, including three sites designated as Other Open Land of Townscape Importance, two Public Open Spaces as well as designated Metropolitan Open Land. Richmond riverside with its towpath is an important open area for this town as it provides a significant amount of high quality open space for recreation. No part of the town centre is within an Area poorly provided with Public Open Space. The town centre is rich in historic assets; it is the borough's town centre with the largest amount of Listed Buildings (106 Grade II, 12 Grade II*) and Buildings of Townscape Merit (297). In addition, it is also the only town centre in this borough that is fully covered by Conservation Area designations (six different Conservation Areas cover various parts of the town), which is a reflection of the town centre's historic environment. Parts of Old Deer Park, a Registered Park and Garden, is also within the town centre boundary. An important factor to be considered in the environmental quality assessment of a town centre is the air quality. As Richmond town centre has the most urban areas of this borough, the air quality significantly exceeds the objective in most locations. There are five diffusion tubes within the town centre, whereby the worst air quality has been measured in George Street, followed by Hill Street, Red Lion Street and the Quadrant; Paradise Road shows the best air quality results in this town centre, which only slightly exceeded the objective.

For the purpose of the environmental quality survey, Richmond town centre has been sub-divided into eight areas: (1) Richmond Hill, (2) Riverside, Whittaker Avenue, Heron Square (3) Police station, bus station, cinema (4) George Street, Paradise Road, south of Sheen Road and Duke Street (5) Back areas of George Street and The Quadrant, including Ambassador House, Magdelene's Church (6) The Quadrant, north of Sheen Road and Duke Street (7) Richmond station and surroundings and (8) Parkshot / RACC, Kew Road, St Johns Road. See Appendix 4 of Separate document for a map of the areas that have been surveyed.

Richmond Hill (Area 1) is despite the traffic-related issues (e.g. narrow roads, constrained parking) of very high environmental quality, with good quality and provision of vegetation/tree planting. There may be some room for environmental improvements, but this area is constrained due to its sloping nature. With the exception of Petersham Road, the roads and particularly the pavements are very narrow (especially along Hill Street) and somewhat uneven.

There were no problems with street clutter, litter or fly-posting and graffiti when surveyed. Overall, despite the congested and narrow roads, this area has a pleasant and nice atmosphere, including some very unique shops.

The **riverside area and its surroundings (Area 2)** have a very pleasant and welcoming atmosphere, offering a quiet retreat from the busy town centre. With the exception of some poor paving along the Riverside, which is in significant need of resurfacing, the condition and quality of the pavements and roads are good. There were no problems with litter, fly-posting, graffiti and fly-tipping, but there is some slightly dilapidated street furniture (e.g. benches) at the riverside.

The area by the **police station, bus station and cinema (Area 3)** is heavily influenced by traffic, in particular buses, and thus also very noisy. There is limited scope for planting along Hill Street, but trees and vegetation can be found around the bus and police station. There is generally good design and public realm quality, with the exception of some small areas e.g. parts of Castle Yard and there were no problems with street clutter, litter, fly-posting, graffiti and fly-tipping.

George Street (Area 4) is also impacted by heavy traffic, noisy and busy; however it provides a very good environment for pedestrians with passageways and connections. At the time of the survey, paving works were still undertaken along Eton Street; George Street had already been resurfaced. Despite the limited scope for planting/vegetation, there are some mature trees and other tree planting in this area. There were no problems with street clutter, litter, fly-posting, graffiti and fly-tipping; however, there seems to be insufficient provision in street furniture (i.e. benches). Overall, this is an area of high aesthetic quality, offering a nice and pleasant environment.

The **back areas of George Street (Area 5)** are characterised by residential/gated developments with good passageways for pedestrians. In comparison to George Street, the paving and its quality is not as good and some uneven parts along Sheen Road are in need of resurfacing. There are no problems with street clutter, litter, fly-posting, graffiti and fly-tipping; however, there could be more provision of street furniture (i.e. benches) in the courts/open spaces. Very mature trees and street trees can be found in this area, which add together with the good design and welcoming atmosphere to the generally high environmental quality of this part of the town.

The **Quadrant (Area 6)** is like George Street also heavily impacted by traffic, therefore very busy and noisy. At the time of the survey, the road and pavements were about to be resurfaced as part of the Richmond Town Centre scheme. There are very minor issues with litter and no problems in relation to fly-posting, graffiti and fly-tipping. Despite the limited scope for planting and trees, the widened footways, high quality materials, removal of street clutter and improvements to the street furniture will ensure this part of the town centre is also of high design and public realm quality.

The busiest and most urban part of the town centre is the area of **Richmond Station (Area 7)**, which is characterised by very heavy traffic in a very constrained space, making it a very difficult environment for pedestrians. There is currently no tree planting in this area and the surfacing is very poor, but at the time of the survey, the roads and pavements were about to be resurfaced as part of the Richmond Town Centre scheme. There are some litter problems outside the station entrance, including fly-posting and graffiti, and the street furniture is insufficient and of poor quality. Overall, the public realm and environmental quality of this part of the town is very poor.

The **Parkshot site and Old Deer Car Park (Area 8)** are very different in terms of their atmosphere and environmental quality when compared to the parts of the town along the main road. There is good provision and quality planting/soft landscaping, but some surfaces are in need of repair. There are some litter problems in the car park and near the railway tracks, but there are no incidents of fly-posting, graffiti or fly-tipping. Overall, this area has a secondary town centre role (i.e. car parking, education) and its environmental quality is generally good.

See Appendix 3 of separate document for the detailed results of the desk-based assessment, including analysis of open spaces, historic assets, air quality etc.

The individual survey sheets for the areas assessed can be found in Appendix 5 of separate document.

2.13 Implementation of proposal sites

Table 30: Implementation of UDP Proposal Sites in Richmond town centre boundary

Proposal site		Description	Progress in 2007/08	Progress in 2008/09	Progress in 2009/10	Progress in 2010/11	Progress in 2011/12
R1	George Street	improved conditions for pedestrians, feasibility of pedestrianisation	partially completed	partially completed	partially completed	partially completed	implemented
R2	The Quadrant	service road extension	not implemented	not implemented	not implemented	not implemented	not implemented
R3	United Reformed Church, Little Green	conversion of existing church building to, office/ residential use, community building, footpath link to Little Green	not saved	not saved	not saved	not saved	not saved

Proposal site		Description	Progress in 2007/08	Progress in 2008/09	Progress in 2009/10	Progress in 2010/11	Progress in 2011/12
R6	Richmond Station & air track rights	transport inter-change, railtrack concourse, comprehensive retail/ business use/ community/ entertainment / residential / parking	not implemented	not implemented	not implemented	not implemented	not implemented

Source: Extract from Appendix of Annual Monitoring Report 2011/12

The final phase of the improvements to Richmond town centre are due to be completed in April/May 2013 which is the culmination of considerable investment, which includes on-going works outside the Station and laying of pavements in Eton Street and Lower George Street. The key remaining site for the comprehensive redevelopment of Richmond Station site is unimplemented. It has a Site Brief. However, proposal sites are to be reviewed as part of work undertaken for the Site Allocations Development Planning Document which is likely to produce additional sites.

2.14 Completions and commitments

Table 31: A1 Use Class (shop) completions in Richmond town centre boundary 1/10/2007 to 1/4/2012

			New completed floorspace 1*			**Net additional floorspace 2* (taking account of losses)**		
application ref	address	summary of proposal	new completed floorspace (m2) (gross external)	new gross internal floorspace m2 3* (gross internal)	of which net tradable floorspace m2 4* (gross internal)	net additional floorspace (gross external)	net additional floorspace (gross internal)	of which net tradable floorspace
10/1496/FUL	12 - 14 Brewers Lane, Richmond	Conversion of one pair of linked shops back to two separate shops, to convert first and second floors into two separate 1 bedroom maisonettes.				-135	-129.9	-14.0
09/2098/FUL	25 - 27 Kew Road, Richmond, TW9 2NQ	Change of use of the existing ground floor unit (A1/A2 Use) to a Dental Practice (D1 Use), retaining a retail element at the front of the unit…				-85	-81.8	65.5
10/2716/FUL	3 George Street, Richmond, TW9 1JY	New shopfront and change of use to part A1 (retail) and part D1 (spa, consultation, treatment rooms).				-58	-55.8	**-53.7**
09/1109/PS 192	7, The Quadrant, Richmond, TW9 1BP	Change of use of first floor from ancillary retail space to a single flat.				-75.0	-72.2	0
06/3300/FUL	5-7 Hill Rise, Richmond	New shop front to No.7. Change of use of rear ground floor of no.5 to ancillary store use in connection with ground floor use of nos.1-3 Hill Rise and rear of first floor of No.5 to A3 use ancillary to club on first floor of nos.1-3 Hill Rise. …	115	110.7	27	115	110.7	27.0
07/4349	17 Richmond Hill	Change A1 to A2				-17	-16.36	**-15.7**
07/0157	39 & 41 Kew Road, Richmond	Change of use of no.41 to mixed use A1/A3/A4.				-40	-38.5	19
06/1110	Unit 2, 19 Kew Road, Richmond	Change of use from A1 to A2				-35	-33.7	-33.7
07/4042	6 Duke Street	Change of use of part of basement to allow mixed use of A1 and D1 (acupuncture and massage).				-16	-15.4	0
09/2122	3 Paradise Road	Change of use to A1 and D1 use (consulting rooms).				-29	-27.9	**-26.9**
11/0160	16 King Street	Change of Use of ground floor to A1 retail (from D1).	68	65.5	36	68	65.5	36
10/3204	31 Sheen Road, Richmond	Change of use from Class A1 retail to class A2 (estate agent).				-234	-225.2	-143
10/1662/FUL	8, The Square	Change of use from A1 to A3 cafe / restaurant.				-92	-88.6	**-85.2**
11/0626	20 Red Lion Street	Ground floor single storey rear extension to retail unit. (ancillary only)	22	21.2	0	22	21.2	0
		TOTAL	205	197.3	63.0	-611	-588.1	-224.5

Source : LBRuT Decisions Analysis system. Produced by Planning Policy Section.

Notes:

1* - New floorspace completions plus gains from change of use and conversions
2* - Net additional floorspace - takes account of losses and gains
3* Difference between gross external and gross internal floorspace defined by DCLG as 3.75%
4* Net tradable floorspace is the amount of gross internal floorspace which is trading floorspace i.e. sales space which customers have access to. Where retail sales area of either the existing or proposed development, or both is not known a proxy is calculated using a 80/20 ratio **(identified in bold)**

There have been very few retail completions in the last few years in the town centre. In fact, taking into account completions resulting in the loss of retail floorspace (either through change of use or from reduction in the size of units (usually ancillary space)), there has been an overall net loss of 600m2, of which 225m2 is retail sales area. In effect, there has been little change in provision.

Commitments

Table 32: Commitments in pipeline (additional retail) in Richmond town centre (outstanding at Apr 2012)

				Additional retail in pipeline		
application ref	decision date	address	Proposal	approx retail sales area m2	Ancillary retail m2	total m2
11/3842/FUL	18-Jan-12	12 The Quadrant Richmond**	Change of use at ground floor from sui generis to A1/A2 uses			142
11/1523/FUL	06-Jul-11	5 Hill Street Richmond TW9 1SX	Change of use of ground, first and second floor level from D1 (Dentist's Surgery) to A1 (Retail). …	152	102	254
09/1294/FUL	14/09/2009	1 - 5 Lower George Street	Redevelopment of the existing building and the erection of a 4 storey building plus basement providing retail (Class A1) at basement and ground floors and offices (class B1) at first, second and third floors…	606	-1121	-515
11/0243/COU	01/03/2011	14 King Street	Change of use of the front part of the ground floor, and re-location of basement storage, from B1 use class to A1 **or A2 use classes**.			122
11/0626/FUL	11/04/2011	20 Red Lion Street	Ground floor single storey rear extension to retail unit.		22	22
			TOTAL	**758**	**-997**	**25**

Source: LBRuT Decisions Analysis system. Produced by Planning Policy Section **.**
Notes: Table includes additional space only, not where there is a reduction in retail space.

There is approximately 750m2 of retail floorspace in the pipeline (retail sales), essentially due to the Lower George Street application due to be occupied by US Wholefoods, which is a positive sign for the centre, in terms of investment. Technically this replaces retail floorspace, although the building itself is a complete redevelopment. This development increases the amount of trading space, but reduces the ancillary floorspace. Overall, the picture is one of minimal expected increase in the short term.

Table 33: Commitments in pipeline (additional retail) of interest (outstanding at Apr 2012)

				Additional retail in pipeline		
application ref	decision date	address	Proposal	approx retail sales area m2	Ancillary retail m2	total m2
09/2147/FUL	12-Apr-10	76 - 84 Kew Road Richmond TW9 2PQ*	Variation during the course of construction to planning permission 08/3234/FUL to enable the ground floor commercial units (Nos. 1 & 2) to be used for A1 (Retail) uses.			509
12/1225/FUL	14-Jun-12	86 Manor Road Richmond TW9 1YB	Installation of internal mezzanine for retail sales, and external alterations.	194	59	253
11/2562/VRC	30/03/2012	Sainsburys, 361 Lower Mortlake Road	Application to vary conditions U39908 and U40036 of planning permission 10/3085/FUL to allow an increased sales area within the existing store (as extended).	1100		1100
12/1001/FUL	Decision?	391 Richmond Road, Twickenham,TW1 2EF	Demolition of existing offices, retail units and two flats. Construction of a new ground - 4 storey development to provide a new retail unit (A1), 94 bedroom hotel (C1) etc…	591	339	930
			TOTAL	**1885**	**398**	**2792**

Source: LBRuT Decisions Analysis system. Produced by Planning Policy Section **.**
Notes: Table includes additional space only, not where there is a reduction in retail space.
* although technically this is a reduction in retail floorspace as the proposal is mixed use, the Café Matthiae site has been vacant for many years. Tesco have brought this into use. **Open Nov 2012**

The above table includes presents permissions of interest to this analysis. The redevelopment of Café Mattiae for a small format Tesco store on Kew Road, is outside the town centre boundary. The site formerly on the English Heritage At Risk Register has been vacant for many years.

2.15 Potential for growth & change

The Council commissioned consultants GVA Grimley (2006) to produce a retail capacity study forming part of the evidence base for the LDF. It identified need and capacity in terms of quality and quantity for additional retail development (for food & non-food goods) in the borough. It assessed the capacity of existing centres to accommodate any identified requirements, and advised on a range of sites in terms of a preliminary assessment.

The **qualitative assessment** for Richmond suggested the centre was an established upmarket shopping destination, had an attractive environment, specialist retailers, the balance of uses had remained relatively stable, rents were rising & vacancy rates are well-below national average. It considered that the centre suffered from traffic congestion and a poor pedestrian environment. However, a programme of improvements have been implemented since then which included improvements for pedestrians.

Capacity projections 2006 & 2009

In 2006 a household telephone survey (1,000 respondents) was commissioned to provide information on shopping patterns. The model used predicts the amount of shopping floorspace required based on variables including the predicted level of population growth in the area[12], the likely spending per head, the amount of floorspace existing and any commitments in the pipeline. 3 sets of capacity forecasts were produced for both food & non-food shopping. Various projections were produced for a range of years between 2005 & 2018.

GVA Grimley were commissioned to update the quantitative part of the assessment in 2009. For this assessment, elements of the model were updated including the use of higher population estimates which increased the available expenditure. Expenditure growth rates were lowered to reflect the then latest forecasts from Experian taking account of the recession and an increase in internet sales, offsetting higher population figures, particularly for comparison goods. Sales efficiency growth was also adjusted. A new telephone survey was not commissioned.

For Richmond town centre the revised forecasts suggest **capacity** for 3203 m2 net **for convenience** (food) floorspace by 2016, rising to 3605 m2 net by 2021[13]. After this point (2026) capacity arises again by approximately the same amount, although such long range forecasts should be treated with caution. For **comparison goods** Richmond has an **estimated capacity of 1,465m^2 in 2016 rising significantly to 4988m2 net**[14] **by 2021**.

The net figures can be translated into gross town centre floorspace (including non-sales areas) by applying an appropriate gross to net ratio (65%). The gross figure also includes a further 15% for A3, A4 and A5 uses in the scheme, making a total ratio of c 80/20[15]. **Gross comparison capacity is also forecast as 2,651m^2 by 2016 and 9,028 m^2 by 2021**. Overall, therefore this research suggests a **quantitative need to provide retail floorspace in the town centre which translates as an indicative requirement of 8,000m2 net by 2017/18 in the adopted Core Strategy (para 6.1.14)**[16]**.**

Richmond town centre is expected to accommodate the bulk of the retail capacity in the borough. Information provided suggests that to date completed floorspace and commitments in the pipeline would not meet this need.

The Study concludes that in general, proposals coming forward should be directed to the borough's town centres in the first instance. The scale of such development should be considered, as should the implications for existing floorspace and the potential to clawback money leaking from the catchment area. Since a proportion of the capacity arises from out of centre development, and bearing in mind that town centre sites should be considered first, there is potential to support more floorspace than identified in the analysis. It goes on to say that the Council should be proactive in planning for the borough's town centres bearing in mind the potential threat from Westfield shopping centre.

[12] The relevant Study area extends beyond the borough boundary to include parts of Surrey, Wandsworth and Kingston.
[13] Residual expenditure is converted to floorspace using a sales density of £10,000 per m2, a minimum level required by most major food retailers.
[14] Assuming new comparison floorspace achieves a sales density of c. £5,000m2 net.
[15] It does not include leisure floorspace
[16] Subject to testing of site availability at Site Allocations stage

Table 34: Capacity forecasts for town centres

VARIABLE	MARCH 2006 STUDY		NOVEMBER 2009 UPDATE	
	Convenience	Comparison	Convenience	Comparison
CAPACITY FORECASTS (CONVENIENCE AND COMPARISON) SQM NET	Borough Wide 2008: 1,440 sqm 2013: 2,535 sqm 2016: 3,094 sqm 2018: 3,474 sqm	Borough Wide 2008: 2,276 sqm 2013: 7,222 sqm 2016: 10,742 sqm 2018: 13,460 sqm	Borough Wide 2011: 8,292 sqm 2016: 10,266 sqm 2021: 12,093 sqm 2026: 14,096 sqm	Borough Wide 2011: 153 sqm 2016: 2,588 sqm 2021: 8,929 sqm 2026: 16,470 sqm
	Richmond 2008: 1,107 sqm 2013: 1,351 sqm 2016: 1,476 sqm 2018: 1,561 sqm	Richmond 2008: 1,149 sqm 2013: 3,646 sqm 2016: 5,424 sqm 2018: 6,796 sqm	Richmond 2011: 2,744 sqm 2016: 3,203 sqm 2021: 3,605 sqm 2026: 4,042 sqm	Richmond 2011: 98 sqm 2016: 1,465 sqm 2021: 4,988 sqm 2026: 9,172 sqm
	East Sheen 2008: 371 sqm 2013: 502 sqm 2016: 569 sqm 2018: 614 sqm	East Sheen 2008: 156 sqm 2013: 495 sqm 2016: 736 sqm 2018: 922 sqm	East Sheen 2011: 897 sqm 2016: 1,110 sqm 2021: 1,311 sqm 2026: 1,535 sqm	East Sheen 2011: 3 sqm 2016: 148 sqm 2021: 542 sqm 2026: 1,014 sqm
	Twickenham 2008-2018: Negative Capacity	Twickenham 2008: 205 sqm 2013: 651 sqm 2016: 968 sqm 2018: 1,213 sqm	Twickenham 2011-2021: Negative Capacity 2026: 50 sqm	Twickenham 2011: 17 sqm 2016: 226 sqm 2021: 755 sqm 2026: 1,383 sqm
	Teddington 2008-2018: Negative Capacity	Teddington 2008: 95 sqm 2013: 303 sqm 2016: 451 sqm 2018: 565 sqm	Teddington 2011: 1,231 sqm 2016: 1,511 sqm 2021: 1,777 sqm 2026: 2,074 sqm	Teddington 2011: 2 sqm 2016: 95 sqm 2021: 350 sqm 2026: 658 sqm
	Whitton 2008: 25 sqm 2013: 67 sqm 2016: 88 sqm 2018: 102 sqm	Whitton 2008: 86 sqm 2013: 272 sqm 2016: 405 sqm 2018: 508 sqm	Whitton 2011: 150 sqm 2016: 226 sqm 2021: 294 sqm 2026: 367 sqm	Whitton 2011: 7 sqm 2016: 89 sqm 2021: 294 sqm 2026: 535 sqm

Source: GVA Grimley Retail Study Update November 2009.

Scope for development

The consultants considered that there was an opportunity to extend town centre foodstore provision over the plan period. That potential existed to increase, improve & consolidate comparison goods retail provision, and to meet the need for larger modern retail units in order to maintain market share. Also to improve pedestrian environment and townscape.
As part of the Study a number of sites were assessed in each town centre on the basis of an initial appraisal only and future viability testing was anticipated. The selection was not necessarily exhaustive & site boundaries only indicative.

Recommendations:
Richmond station site – retain proposal. The scheme should promote strong linkages with the existing shopping frontages & improve pedestrian environment through to the Quadrant.
Bus/police station Wakefield Road – may be appropriate for a mixed use scheme, but site is constrained & limited in scale to support a viable retail scheme. Could include nearby sites to create better linkages with core shopping area. Detailed testing required.
Eton Street – appropriate for mixed use development with retail on the ground floor.
The Council will look more closely at sites as part of the preparation for the Site Allocations DPD.

Both studies can be found on the Council's website at
http://www.richmond.gov.uk/home/environment/planning/planning_guidance_and_policies/local_development_framework/local_development_framework_research/retail_study_march_2006.htm

2.16 Town centre management & planned improvements

Richmond has a town centre manager, Con O'Brien, who can be contacted on info@richmondtown.org.uk .

The work on the £4m town centre project started in 2007/8 and the final phase will continue in 2011/12, covering works in the town centre, including the area around the railway station.

High quality Yorkshire paving has been laid throughout the footways in the town centre with shared use loading bay/footway extensions to increase footway widths whenever possible. New street lighting and improved CCTV has been introduced in order to assist with antisocial behaviour throughout the town.

A new service road outside Richmond Station will incorporate widened pedestrian areas. The new square to the front of the station will be only for pedestrians. The works should be mainly finished by the end April. The laying of York stone paving is ongoing around the new development at 1-5 Lower George Street and additional stone paving is being laid in Eton Street.

Summary

Richmond's role as a sub-regional centre providing comparison shopping is illustrated by the considerable amount of floorspace in non-food shopping, its mix and the type of businesses present. The rise in retail vacancies has been explained in part by redevelopment, but the very recent decline in vacancy rates, coupled with an increase in Zone A rents, low levels of charity shops are factors which suggest demand exists. Richmond appears successful as a retail location, certainly compared to other regional and national comparators.

Many indicators in this report illustrate Richmond's success and buoyancy. Its high quality environment, historic and cultural assets and its mix of multiples and independents give the centre its niche. It already has a wide "destination offer" which goes beyond shopping. Perhaps the challenge that remains is to build on the centre's strong offer, particularly its cultural assets, and to market them to existing and new users. A strong and active retail and business association, and a sense of vision, will help to achieve this end.

It is expected that the majority of forecast retail capacity will be accommodated here, and it is hoped that the development of the station site and others which come forward will help retain the centre's position and keep the shopping spend in the borough.

However, there appears to be lower footfall than in the past and retailers face a very competitive environment in tough economic times, particularly from the growth in e-tailing. The need to monitor the economic health of the centre, and to ensure a good balance of shopping to other businesses is critical, particularly bearing in mind the major structural changes happening in the retail sector.

3: Twickenham town centre

Introduction

Regional context

Twickenham is a district centre, forming part of the Mayor's town centre network. As such its main purpose is to provide convenience goods and services to local communities.

The London Plan provides guidance on the future policy direction of centres and defines Twickenham as appropriate for "medium growth" (policy A2.6), which is described as "town centres with moderate levels of demand for retail, leisure or office floorspace and with physical and public transport capacity to accommodate it." However, it is acknowledged that such categorisations are indicative and refer to the broad potential for the whole centre and not individual sites. Twickenham is also considered to have a specialised cluster of night-time activities of more than local importance and is identified as suitable for speculative office development[17].

Twickenham Area Action Plan

The Council has prepared an Area Action Plan for Twickenham town centre which when adopted shortly will set the statutory framework for the development of the centre and includes site allocations. It will be implemented alongside relevant policies for town centres included in the Core Strategy (specifically policies CP8 - town and local centres and CP 9 – Twickenham town centre) and in the adopted Development Management Plan policies.

The Examination in Public into the TAAP took place in February 2013. The Inspector's Report is likely in the Spring, and adoption in Summer.

Village plan for Twickenham

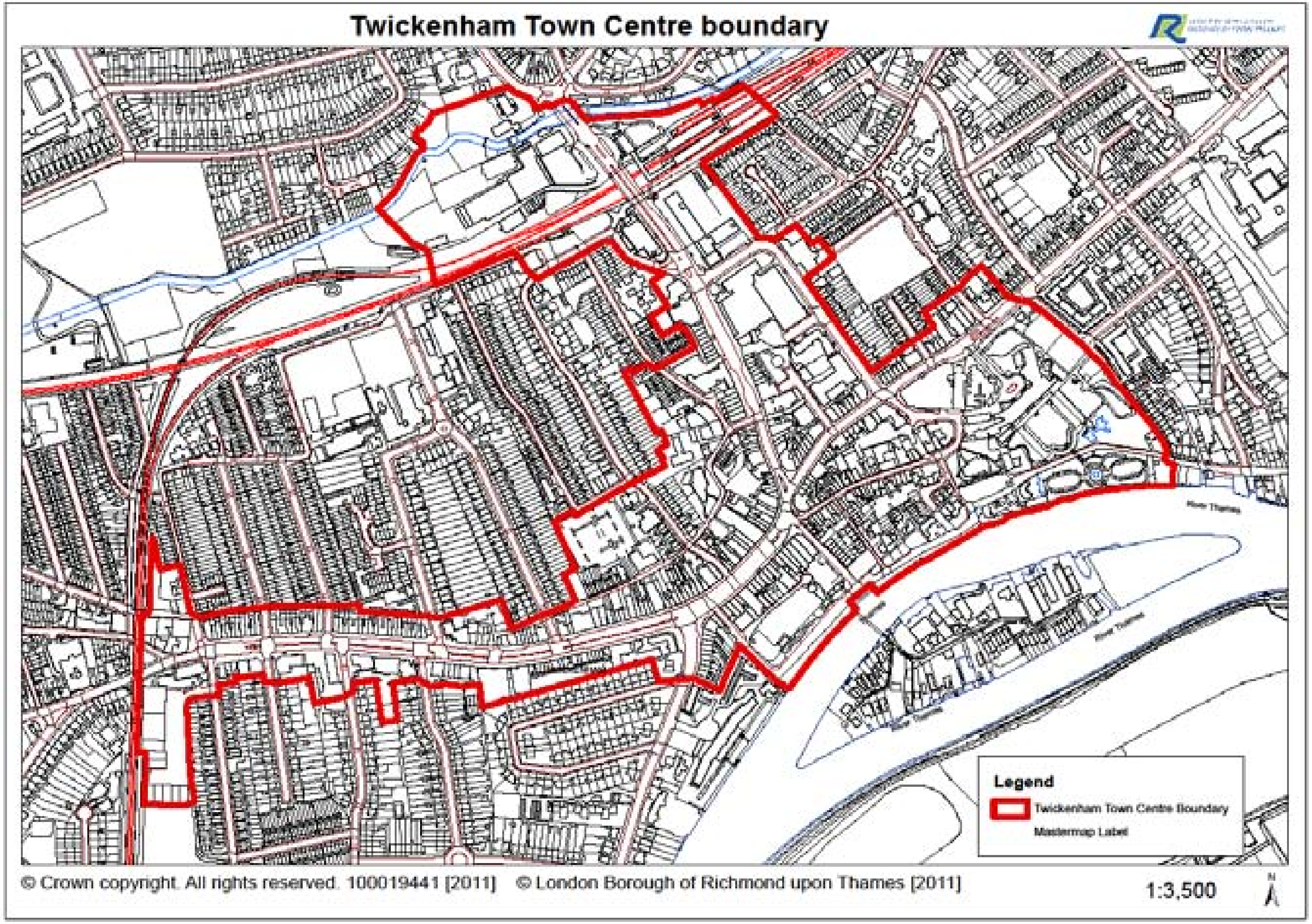
The Council has produced a series of Village Plans following extensive consultation through an All-In-Survey. Please use the following link to access the following web pages.
http://www.richmond.gov.uk/twickenham_area_village_plan.htm

The vision set out in the Village Plan includes the following relating to town centres:

Twickenham town centre lies at the heart of the area and is the largest of the Borough's 4 district centres providing a good range of shops and services. Just outside the town centre is the Rugby Football Union Stadium (RFU).

The vision for the town centre is based on a high quality town centre serving local residents, workers and visitors – a destination of choice with a unique sense of place. The town will meet modern requirements and have a strong local economy whilst making the most of its distinctive heritage, open spaces and riverside.

[17] speculative office development could be promoted on the most efficient and accessible sites in the context of wider schemes to enhance the environment and offer of the centre as a commercial location.


Twickenham Town Centre boundary
River Thames
Legend
Twickenham Town Centre Boundary
Mastermap Label
© Crown copyright. All rights reserved. 100019441 [2011] © London Borough of Richmond upon Thames [2011]
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3.1 Diversity of main town centre uses

3.1 a) Mix of uses: business activity

Table 35: Diversity of uses in Twickenham town centre

Planning policy designation*1	Use Class	2000	2001	2002	2004	2006	2008	2010	2011	2012	2000	2001	2002	2004	2006	2008	2010	2011	2012	Town centre*2 average 2012
		number of uses									percentages									
KEY	**A1**	86	88	83	87	89	89	88	88	**85**	66.2	67.7	63.8	66.4	67.9	67.9	66.7	66.7	64.4	69.3
	A2	15	15	16	17	16	15	15	14	**13**	11.5	11.5	12.3	13.0	12.2	11.5	11.4	10.6	9.8	7.6
	A3/A4/A5*2	18	18	18	21	19	18	21	20	**20**	13.8	13.8	13.8	16.0	14.5	13.7	15.9	15.2	15.2	13.4
	Other	4	4	4	4	3	3	2	3	**3**	3.1	3.1	3.1	3.1	2.3	2.3	1.5	2.3	2.3	2.4
	Vacant	7	5	9	2	4	6	6	7	**11**	5.4	3.8	6.9	1.5	3.1	4.6	4.5	5.3	8.3	6.5
	Total	**130**	**130**	**130**	**131**	**131**	**131**	**132**	**132**	**132**										
SECONDARY	**A1**	55	55	59	54	56	51	50	52	**55**	46.6	46.2	48.8	45.8	47.5	43.6	42.4	45.6	47.4	51.5
	A2	12	13	13	14	16	13	12	11	**12**	10.2	10.9	10.7	11.9	13.6	11.1	10.2	9.6	10.3	10.5
	A3/A4/A5	28	28	28	29	27	28	29	28	**26**	23.7	23.5	23.1	24.6	22.9	23.9	24.6	24.6	22.4	20.7
	Other	14	13	12	13	12	12	12	9	**11**	11.9	10.9	9.9	11.0	10.2	10.3	10.2	7.9	9.5	9.0
	Vacant	9	10	9	8	7	13	15	14	**12**	7.6	8.4	7.4	6.8	5.9	11.1	12.7	12.3	10.3	9.2
	Total	**118**	**119**	**121**	**118**	**118**	**117**	**118**	**114**	**116**										
NON-DESIGNATED	**A1**	12	15	16	15	17	16	16	18	**18**	24.5	28.8	32.7	30.0	33.3	32.0	31.4	34.0	35.3	33.7
	A2	2	2	2	1	2	2	2	4	**4**	4.1	3.8	4.1	2.0	3.9	4.0	3.9	7.5	7.8	6.7
	A3/A4/A5	20	20	21	**23**	22	21	20	17	**19**	40.8	38.5	42.9	46.0	43.1	42.0	39.2	32.1	37.3	26.4
	Other	10	10	5	8	7	7	6	5	**7**	20.4	19.2	10.2	16.0	13.7	14.0	11.8	9.4	13.7	23.8
	Vacant	5	5	5	3	3	4	7	9	**3**	10.2	9.6	10.2	6.0	5.9	8.0	13.7	17.0	5.9	8.3
	Total	**49**	**52**	**49**	**50**	**51**	**50**	**51**	**53**	**51**										
TOTAL FRONTAGE	**A1**	153	158	158	156	162	156	154	158	158	51.5	52.5	52.7	52.2	54	52.3	51.2	52.8	52.8	57.5
	A2	29	30	31	32	34	30	29	29	29	9.8	10.0	10.3	10.7	11.3	10.1	9.6	9.7	9.7	8.5
	A3/A4/A5	66	66	67	73	68	67	70	65	65	22.2	21.9	22.3	24.4	22.7	22.5	23.3	21.7	21.7	18.0
	Other	28	27	21	25	22	22	20	17	21	9.4	9.0	7.0	8.4	7.3	7.4	6.6	5.7	7.0	8.0
	Vacant	21	20	23	13	14	23	28	30	26	7.1	6.6	7.7	4.3	4.7	7.7	9.3	10.0	8.7	7.7
	Total	297	301	300	299	300	298	301	299	299										
TOTAL DESIGNATED FRONTAGE	**A1**	**141**	**143**	**142**	**141**	**145**	**140**	**138**	**140**	**140**	56.9	57.4	56.6	56.6	**58.2**	56.5	55.2	56.9	56.5	61.7
	A2	**27**	**28**	**29**	**31**	**32**	**28**	**27**	**25**	**25**	10.9	11.2	11.6	12.4	**12.9**	11.3	10.8	10.2	10.1	8.8
	A3/A4/A5	**46**	**46**	**46**	**50**	**46**	**46**	**50**	**48**	**46**	18.5	18.5	18.3	20.1	**18.5**	18.5	20.0	19.5	18.5	16.5
	Other	**18**	**17**	**16**	**17**	**15**	**15**	**14**	**12**	**14**	7.3	6.8	6.4	6.8	**6**	6.0	5.6	4.9	5.6	5.2
	Vacant	**16**	**15**	**18**	**10**	**11**	**19**	**21**	**21**	**23**	6.5	6.0	7.2	4.0	**4.4**	7.7	8.4	8.5	9.3	7.6
	Total	**248**	**249**	**251**	**249**	**249**	**248**	**250**	**246**	**248**										

source: LBRuT Town Centre Land Use Surveys undertaken in Summer. See Appendix for details of Survey.
Notes: *1 – Calculations for the Land Use Survey uses shopping frontage designations from the DMDPD designations. However, in the case of Twickenham the designations have remained unchanged.

*2 – town centre average is the average for the 5 main centres in the borough

Note: Data include 16 properties outside town centre boundary.

An explanation of the Use Classes Order can be found in Appendix 1. The Council undertakes an Annual Land Use Surveys of town and local centres[18].

58% of the units/outlets in the centre are shops (158 units). Some 22% are in either the A3 (cafes and restaurants), A4 (drinking establishments) or A5 (take away) use. As elsewhere the key change in the centre since 2000 has been the increase in vacancy rates as a result of the recession. However, vacancy rates have dropped between 2011 and 2012. The number of vacant units falling from 30 to 26.

The centre has experienced a degree of diversification as the table above shows. However, numbers of shops remain fairly constant and have been rising since the peak in 2006. A number of new retail units have been built in Heath Road over the period. Of those vacant in 2012 60% are shops and 30% entertainment uses. Twickenham's eating & drinking offer has also been affected by the economic downtown. The number of "other" uses in the centre has also declined.

Table 36: Growth in key sectors in Twickenham

	Number of outlets 1998	Number of outlets 2012
Cafes/coffee shop	11	16
Pubs	10	14
Restaurants	22	28
Estate agents	14	13

Source: LBRuT Town Centre Land Use Surveys. Produced by Planning Policy Section. Figures include A1/A3 outlets in café sector, but excludes sandwich bars operating in A1 use class. Figures also **include** vacant units in that use.

The above table shows that Twickenham has experienced diversification over the long term. These figures include vacant units in that use which gives an alternative picture of long term change. The centre is experiencing relatively high vacancy rates which could have the effect of masking diversification. It may be that some of the premises will not remain in that use in the future.

Charity Shops

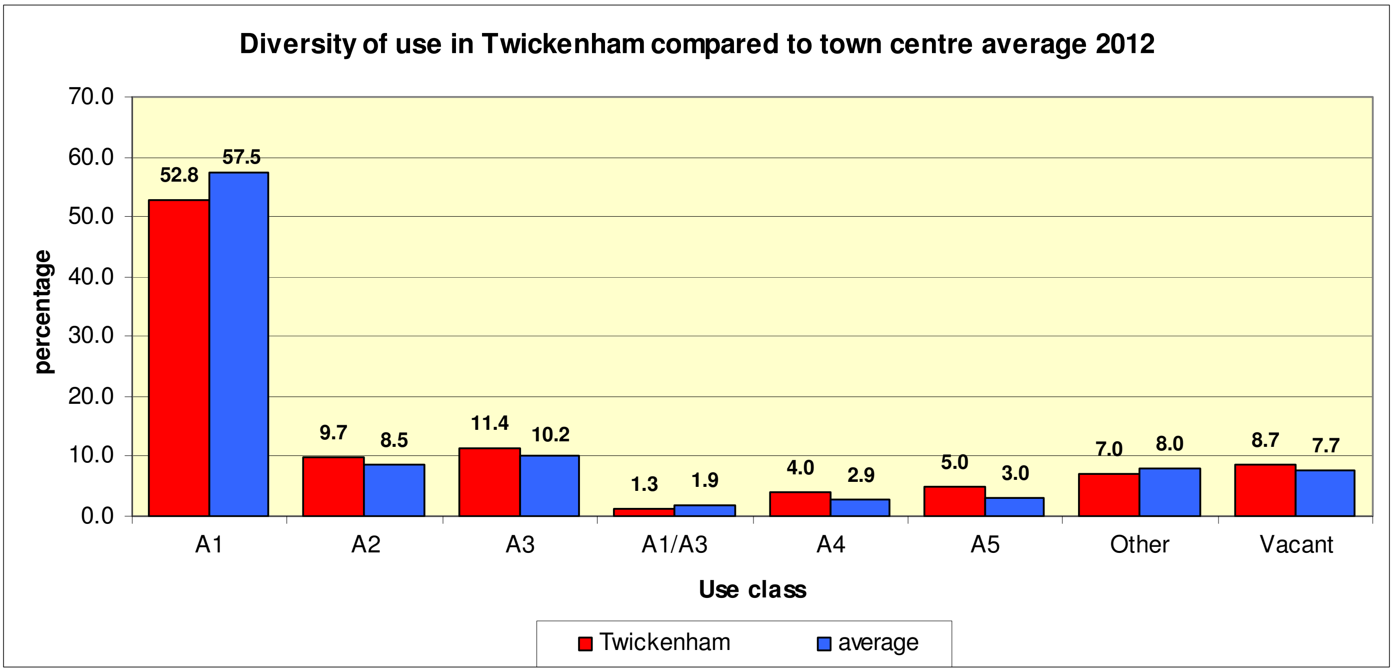
See Table 5 for borough comparison. With 10 charity shops Twickenham, along with East Sheen, has the largest number of charity shops amongst the larger centres, amounting to 6.3% of all retail outlets in the centre. It is also the only centre where the number has increased between 2011 and 2012 with the addition of the Sue Ryder shop on Heath Road, which is a double unit formerly occupied by a Laura Ashley homestore. The Experian GOAD index of 132 (for outlets) indicates a greater provision than the UK average.

Most centres in the borough have an above average number of charity shops and this may in part be due to charity shops seeking representation in more affluent areas where rents are not prohibitively high as in Richmond.

[18] Data from the Annual Land Use Survey includes a small number of properties outside of the mixed use area/town centre boundary.

Comparison with other borough centres

Mix of businesses – Twickenham and town centre average (2012)



Source: LBRuT Town Centre Land Use Survey 2012. Produced by Planning Policy Section.

Average: average of 5 main centres in the borough

The Council offices are based at Twickenham and along with other office employment plus the presence of Twickenham Stadium it has developed a strong food & drink offer. Statistics show that it has significantly more take-aways than any other centre, and only Richmond has slightly more pubs and restaurants.

Twickenham differs from the average district centre in having a larger percentage of uses in A3, A4 or A5 use, and a relatively smaller proportion of shops. This is especially noticeable in non-designated frontages[19].

Benchmarking: UK comparison

The research company Experian GOAD undertakes surveys of the larger centres in the UK which allows a national average of the types of occupiers in those centres surveyed to be established. Individual town centres can then be compared with this average. The table below compares Twickenham with the UK base. A figure above 100 indicates greater than average provision, and below 100, the opposite. The index is calculated separately for outlets (i.e. number of businesses) and for the amount of floorspace.

The current picture is that in terms of the number of food shops present, Twickenham matches the national average, although in relation to the amount of floorspace in this sector, it is below the average. There a fewer comparison goods retailers (non-food shopping) than the average using either measure.

Twickenham has above average provision in terms of businesses providing retail, financial and leisure services. See later section for more detail on the leisure sector which is broadly in line with the Council's land use surveys.

[19] Planning policies define parts of town centres as key and secondary shopping frontages where restrictions to changes of use from retail apply. In key frontages loss of retail is not normally acceptable and in secondary frontages greater flexibility is allowed to encourage an appropriate level of diversification. Please see http://www.richmond.gov.uk/home/environment/planning/planning_guidance_and_policies.htm A list of addresses can be found in Appendices to the UDP and LDF Development Management DPD. The latter incorporates revisions to the list of addresses and has been adopted for development control purposes.

3.1 b: Comparing Twickenham town centre to the UK average

Table 37: Comparing Twickenham to the UK

	Spring 2005				Nov-09				**May-12**				
	outlets		Floorspace		outlets		floorspace		**outlets**		**floorspace**		
	number	UK index	amount ft2	UK index	number	UK index	amount ft2	UK index	**number**	**UK index**	**amount ft2**	**UK index**	**floorspace converted to m2**
comparison retail	77	72	134,800	69	68	70	122,700	68	**77**	**80**	**144,300**	**79**	**13410**
convenience retail	27	63	62,900	63	25	99	57,700	82	**23**	**99**	**53,100**	**74**	**4930**
retail services	49	139	60,200	178	45	119	55,600	162	**52**	**132**	**63,200**	**176**	**5870**
other retail	1	237	400	67	0		0	-	**0**	**0**	**0**	**-**	
Leisure	80	142	130,000	124	85	135	135,200	121	**85**	**133**	**137,900**	**122**	**12810**
financial & business services	39	119	82,600	186	35	110	78,800	188	**33**	**103**	**74,100**	**178**	**6880**
Vacant	9	35	13100	39	31	93	41,100	87	**22**	**62**	**26,800**	**53**	**2490**
Total	282		483,600		289		491,100		**292**		**499,400**		**46400**

Notes: Index of 100 = UK average, less than 100 indicates fewer multiples in terms of percentage than the average

Total may not sum due to rounding.

Under-representation of sectors

Experian survey most of the larger town centres across the UK and thus we can compare an individual centre's composition (the types of businesses in the centre) with a hypothetical UK average centre. This is particularly useful if we wish to determine whether there are potential gaps in provision (under-representation) which could be targeted for inward investment should there be scope to do so.

Data are available on two Indices one for "outlets" and the other "floorspace" i.e. we can compare the numbers of businesses in centre in a particular centre to the UK average, and also the amount of floorspace in that sector. To get a full picture of where under-representation might indicate a gap in provision, we must consider both together, as for example there be fewer outlets in a sector than the UK average, but the floorspace is greater because the size of the outlet/s is relatively large.

Smaller centres will have a more limited role in terms of their role and function and thus fewer shops with a more limited variety

Table 38: Under-represented sectors in Twickenham

food retail	types of shops with no outlets in Twickenham:
	permanent market (Twickenham has a regular Farmers' Market).It is the only district centre which retains its fishmongers.
	types of shops under-represented compared to UK average:
	butchers 49 for outlets & 93 in terms of floorspace
	grocers & delis (74), health foods (72). It may include greengrocers and newsagents in this category. However, GOAD data are in error with respect to these two sectors. supermarkets (38). Supermarket provision is provided by Waitrose. An out-of-centre superstore is located in close proximity just beyond the borough boundary in Isleworth. [nb the latest retail capacity study indicates negative capacity for food shopping.]
non-food	types of shops with no outlets in Twickenham:
	catalogue showrooms, department/variety stores, gardens & equipment (nb garden centre adjacent railway bridge on Heath Rd), *jewellery (error - Toko)*, leather and travel goods, menswear & accessories (not hire), video recordings for sale not rental, office supplies, photographic, secondhand goods, books (not charity shops) textiles and soft furnishings (Laura Ashley closure).
	types of shops under-represented compared to UK average:
	under-represented sectors are:
	art (53), children & infants wear (75 - outlets score, 153 - floorspace score), clothing general (15), footwear (87 - outlet score, 103 floorspace score), furniture general (37), cards (83), hardwear & household (47) ladies & menswear & accessories (29), ladies wear & accessories (49), telephones (86), toiletries & cosmetics etc- {not dispensing chemist which are well-provided} (75 for outlets, 64 for floorspace), toys (40)
retail service	The centre is reasonably well-provided for in terms of the retail service sector.
financial & business services	Twickenham is well-provided for in most sectors in this category.

Data are for the immediate town centre as defined by Experian. They are the latest available. However, businesses will have opened and closed since surveyed.
Figure in brackets is the score comparing Twickenham to the UK hypothetical town centre, in terms of outlets (not floorspace). To get a full picture of where under-representation might indicate a gap in provision, the amount of floorspace in that sector must also be considered and where worthy of note i.e. indicating a different picture is referred to in the text. A score below 100 indicates under-representation. The lower the score, the further from the average.

Since 2005 the number of food shops has fallen from 27 to 23 in 2012. In 2005 the overall convenience score was 63, compared to 99 in 2012. Perhaps the range of independent food shops present is reducing elsewhere. Food shopping is provided both by Waitrose and a range of independents.

Twickenham has the same number of comparison goods shops in 2012 as it had in 2005. In general, the pattern has not changed significantly. Much of the investment in new units in Heath Road had occurred prior to 2005. In terms of floorspace, the types of non-food shops which were well-represented in 2005 (usually amalgamated units) are to some extent still in business in 2012, these include musical instruments Heath Rd), florists (Heath Rd), carpets and flooring. Others retailers have closed including fitted furniture specialists now occupied by a charity shop (Laura Ashley in interim.)

3.1 c) Multiple representation in Twickenham town centre

Multiple retailers are defined as those with 9 or more outlets/branches.

See Table 10 for borough comparison. According to Experian GOAD there are 77 multiple outlets in Twickenham, which amounts to 186,400 ft2 (c 17,300m2) of floorspace. This position had changed little between 2005 and 2009, but numbers have are significantly lower in 2012.

In terms of food shopping, Twickenham is similar to the UK average, but below the average in terms of comparison goods shopping. With regard to retail services, leisure and financial & business services the centre has greater representation than the UK average.

It is estimated that in 2005 45%, in 2009 42% and in 2012 37% of the town's total floorspace is operated by a multiple[20]. Just of half of retail floorspace (convenience and comparison excluding retail services) was a multiple retailer in 2005, 2009 and 2012. Approximately a third of shops (outlets) are multiple retailers.

[20] Using Experian GOAD figures as the denominator.

Table 39: Multiples in Twickenham (floorspace & outlets)

	Spring 2005				Nov-09				**Oct-12**				
	outlets		Floorspace		outlets		floorspace		**outlets**		**floorspace**		
	number	UK index	amount ft2	UK index	number	UK index	amount ft2	UK index	**number**	**UK index**	**amount ft2**	**UK index**	**floorspace converted to m2**
Total	85		219,200		86		203,700		**77**		**186,400**		**17320**
comparison retail (non-food shopping)	25	59	60,800	54	26	72	56,800	60	**24**	**72**	**62,900**	**70**	**5840**
convenience retail (food shopping including newsagents, shoe repairs, markets)	11	115	45,200	105	10	107	38,900	91	**9**	**107**	**39,900**	**96**	**3700**
retail services (including health & beauty, Pos, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	2	202	42,600	1811[*3]	11	126	19,700	195	**11**	**143**	**18,500**	**198**	
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	26	141	62,100	155	23	124	53,900	143	**17**	**113**	**29,000**	**101**	**2700**
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	21	157	8,500	39	16	122	34,400	190	**16**	**129**	**36,100**	**215**	**3350**
% operated by a multiple	30.1		45.3		29.8		41.5		26.4		37.3		
% of **retail sector**[*4] operated by a multiple	34.6		53.6		38.7		53		33.0		52.1		

Notes: 1- A multiple has 9 or more outlets. All multiples included retail, retail service, leisure service & financial and business services

2 - Index of 100 = UK average, less than 100 indicates fewer multiples in terms of percentage than the average

*3 - Skewed by small number of outlets and by presence of multiples in chemist/beauty retail sales in large units.
*4 - comparison retail and convenience retail.

3.1d) Entertainment sector

The evening and late night economy plays a significant role in Twickenham's economic prosperity, not least because of the presence of the RFU.

Table 40: Leisure sector: Comparison with UK average (ft 2)

		2005	2009	2012
bars & wine bars	outlet count	6	4	1
	index	147	95	24
	floorspace (ft2)	10,500	13,900	1,900
	index	104	143	21
cafes	outlet count	13	19	18
	index	172	202	152
	floorspace (ft2)	11,800	18,300	19,500
	index	188	217	186
fast food & take away	outlet count	16	17	17
	index	122	104	108
	floorspace (ft2)	16,800	16,700	16,200
	index	155	130	126
public houses	outlet count	12	10	12
	index	126	110	144
	floorspace (ft2)	38,600	31,500	40,300
	index	180	155	213
restaurants	outlet count	25	26	26
	index	217	205	204
	floorspace (ft2)	38,900	43,000	40,700
	index	252	239	216
total leisure services*	outlet count	80	85	85
	index	142	135	133
	floorspace (ft2)	130,000	135,200	137,900
	index	124	121	122
survey date		n/a	13/10/2009	May-12

Notes:
*Includes other in sector such as amusements, betting offices, sports facilities
Map Info/ Experian GOAD are leaders in providing information to the retail sector and survey a large number of towns throughout the country. From this a UK index is derived, whereby if a town had an index of 100 it would exactly match the UK average. A figure below 100 indicates the percentage of outlets/floorspace is below the average, and a figure of more than 100, above the average. There may be differences in the definition of town centres between GOAD and local authorities and survey dates vary between centres. However, it remains the best means of assessing town centre diversity against national comparator.
Boundaries of town centres defined by Map Info/ Experian GOAD may not accord with those used for the Council's Town Centre Land Use Survey.

Data suggest that Twickenham's leisure sector is more developed than the UK average, than other district centres and is in fact more on a par with Richmond. This is especially true in relation to pubs and restaurants.

The amount of pub floorspace in Twickenham is significantly more than other district centres in the borough (in fact is greater than the floorspace in the other district centres put together which amounts to 28,800ft2). The other district centres tend to have a café (Whitton) and restaurant-based (East Sheen) offer, although Teddington, with 17,000ft2 of pub floorspace has a wider eating and drinking offer. Pub floorspace in Twickenham is also greater than in Richmond, and is likely to be related to the presence of the RFU and Stoop. Whereas, the wine bar sector has been hit by closures, notably on York Street.

The position has not changed significantly since 2005, with the exception of a notable increase in cafes. The centre boasts just over 40,000ft2 of restaurants (26 in number), and a similar figure for pubs (12) which far exceeds the UK average. It has a further 19,500 ft2 of cafes (18 in number).

Twickenham is identified in the London Plan as a centre with night time economy of more than local significance[21]. Data published by the GLA as part of its latest health checks reporting is incomplete for the borough's district centres. However, the table below illustrates that in terms of its size Twickenham has a well-developed evening economy, albeit not on the scale of some of London's larger town centres.

Table 41: Floorspace in entertainment sector in selected South West London Boroughs

Centre	Cinema	Cafés & Restaurants	Bars & Pubs/wine bars	Fast food takeaways	hotels & guesthouses	Sports & Leisure	Total[1]
	M^2						
Kingston	9,800	10,800	10,400	1,900	680	3,330	41,400
Sutton	5,000	5,500	7,200	3,200	1,200	1,500	27,800
Wimbledon	1,500	6,250	7,100	1,600	500	600	18,600
Richmond	1,800	7,100	4,700	700	160	50	15,000
Twickenham[2]	0[3]	no data	no data	no data	400	30	4,600

Source: 2009 London Town Centre Health Check Analysis Report December 2009
2009 GOAD data published in 2009 as part of this report, survey date unknown.
1 = includes cinemas, theatres, cafes & restaurants, pubs/wine bars, fast food take aways, clubs & nightclubs, casinos, bingo etc, hotels & guest houses, sports & leisure, and hence is different from the total in the table above.
2= Mary Wallace Theatre excluded (which is a theatre club, although some performances are open to non-members
3= Information published in tables above supersedes this.

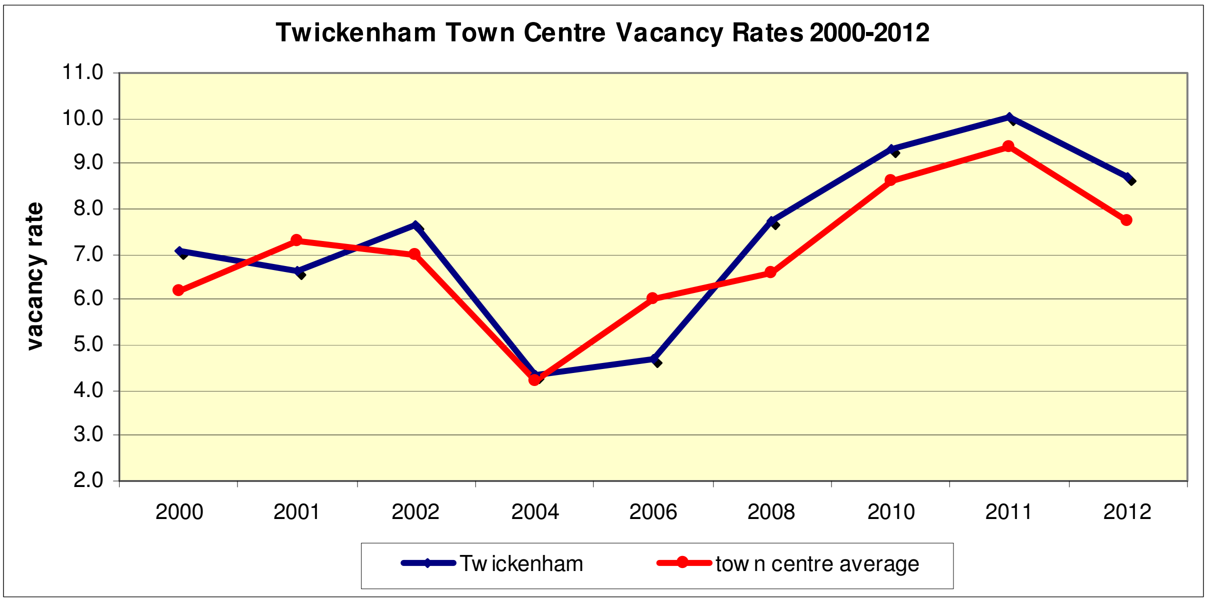
3.2 Vacancy rates

Table 42: Vacancy rates in Twickenham (all frontages)

	Vacant uses as percentage of all uses								
	2000	2001	2002	2004	2006	2008	2010	2011	2012
Twickenham	7.1	6.6	7.7	4.3	4.7	7.7	9.3	10.0	8.7

Source: Town Centre Land Use Surveys undertaken in Summer. Produced by Planning Policy Section.

See Table 13 for borough comparison. The long-term figures show a vacancy rate which has fluctuated considerably over the years. 2011 rates were higher than for a decade, although have dropped again to 8.7% in 2012. Of the five main centres only Whitton has a higher vacancy rate. Since the recession Twickenham's vacancy rates have consistently been above the average for the main centres. However, it remains well below the UK average of approx 15%. GOAD estimated that there was approx 2,500m2 of vacant floorspace in Twickenham (2012).



Long-term vacancies

In July 2012 there were 7 units which were considered to be long-term vacants, i.e. had been vacant for 2 years or more. This is just over a quarter of vacant units in Twickenham. This amounts to just over 2% of units in the centre as a

[21] Town centres that have specialist roles supporting strategic clusters of night time economic activities of more than local significance. Principles to guide the management of these activities are set out in Policy 4.6 of the Draft Replacement London Plan.

whole, which is relatively insignificant. Of these two were subject to planning applications. They consist of a mixture of uses including retail, restaurants, an employment agency and hairdresser.

UK comparisons

Experian GOAD estimate that the UK vacancy rate at approx 14% in Autumn 2012, and nearer to 12% when the latest GOAD category report was produced. Although the methodology and date of survey does not correspond exactly with the Council's more frequent surveys it indicates that vacancy rates in the centre were below the national average. The latest data suggests an index for vacant outlets of 62, where the UK average is 100. In 2012 Twickenham had approx 2,500m2 of vacant floorspace.

3.3 Comparing Twickenham with the national picture

The Colliers International Town Performance Matrix is a unique benchmarking analysis which compares historical town performance with forecast future performance for 364 towns and cities across Great Britain. The matrix uses a range of data and generates 'historic' and 'future' performance scores have been calculated for each location. See Richmond section 2.3 for details.

Each can be classified as one of five performance categories. Twickenham is considered as **improving**.

Performance category	No of towns	Percentage of towns
Thriving	64	18%
Improving	71	20%
Stable	151	41%
Degenerating	38	10%
Failing	40	11%

Source: Colliers International, 2012 © Colliers International.

Centres at Risk and Venuescore

The Javelin Group published a paper[22] in April 2012 identifying a "threat level" in terms of remaining a successful centre, for more than 600 towns across Britain. Twickenham is identified as in the "most robust" amongst smaller centres.

This data provider also produces an index which ranks over 2,000 UK shopping venues based on their retail offer. Twickenham is ranked 456, an improvement from 2006 when it was ranked 737 in 2006. Whitton as a much smaller centre with a more local role is ranked 1,317, although it has also improved on its 2006 rank of 1,715.

3.4 Businesses looking for space in the centre

The Council's consultants Broadway Malyan commissioned to work on the Twickenham Area Action Plan provided the following information on the position in 2011. There is very little stated demand for premises in the "High Street " area. However, the Consultants advise that this may not tell the whole story since retailer requirements may be based on limited knowledge of the town centre itself, and this may not be recent, nor reflect proposed changes and commitments.

Statistics on searches for commercial property have been obtained from the South London Business database which suggest that in 2010 information on available property in the Twickenham area was sought on 3341 occasions compared to 1687 in 2009 and 2289 in 2008. Although this information source can only give a general view of demand it does at least suggest an increase in demand last year. Twickenham compares favourably with the statistics for other Outer London towns.

Data provided for the calendar year of 2012 (nearly 5,700 for the Twickenham area) suggests an increase in requests from earlier levels.

3.5 Prime Retail Rents

Colliers International collect data on Zone A rents in centres across the country. They suggest Zone A rents (£ per ft2) rose gradually in Twickenham until 2008, dropped to £65/ft2 in the period 2009 to 2011 and rose again to £70/ft2 in 2012. Twickenham as a district centre will not command the same rents as Richmond, but Twickenham's figures are higher than East Sheen and commensurate with the much bigger centre of Hounslow. See Table 18 for more comparative information.

Anecdotal information on rents

Roger Tym & Partners held discussions with local agents as background to work commissioned by the Council on the Community Infrastructure Levy, published in October 2012[23]. In relation to Twickenham, rents are significantly lower

[22] Javelin Group – Battlefield Britain: Survivors & Casualties in the fight for the High Street, April 2012
[23] http://www.richmond.gov.uk/cil_viability_study_report_incl_appendices.pdf

than in Richmond town centre, with the best Zone A achieved being in the order of £646-£700 per sq.m. (£60-£65 per sq.ft). We are aware that Sneller Commercial are marketing a retail showroom in a new development at 121-125 Heath Road in Twickenham. This scheme is a few minutes walk from the town centre and comprises a 451 sq.m (4,852 sq.ft.) retail showroom with apartments above. The quoting rent is £188 per sq.m. (£17.50 per sq.ft).

Anecdotal information provided by local agents in July 2012 suggests that in Twickenham and Teddington, there is limited demand for multiples. Rents achieved are between £25-£60 per sq ft, depending on where they are. Heath Rd in Twickenham has some problems, but London Rd and King St. have reasonable demand although there are some issues around lack of confidence in their covenants.

3.6 Floorspace

2012 Experian GOAD floorspace estimates by sector are included in Table 20. Total estimates amount to c13,400 m2 of comparison floorspace and c.4,900m2 of convenience floorspace, making a total of 18,400m2 shopping floorspace, which is similar to East Sheen, but significantly more than Teddington and Whitton.

An alternative source is the 2009 GVA Grimley Retail Study which estimated that the town centre had 11,000m^2 comparison goods floorspace and 4,050m2 of convenience floorspace (net) in 2009.

3.7 Employment in town centres

Twickenham Riverside is the ward with the best fit for Twickenham town centre boundaries, albeit that the west of Heath Road is located in South Twickenham ward. Workforce data have not yet been released for the 2011 Census. According to the 2001 Census approximately 8,700 people make up the daytime population in this ward, which is more than other district centre in the borough. The daytime population comprises those who work in the area and those who live in the area and do not work.

Table 43: Daytime populations in wards which bestfit with town centre boundaries.

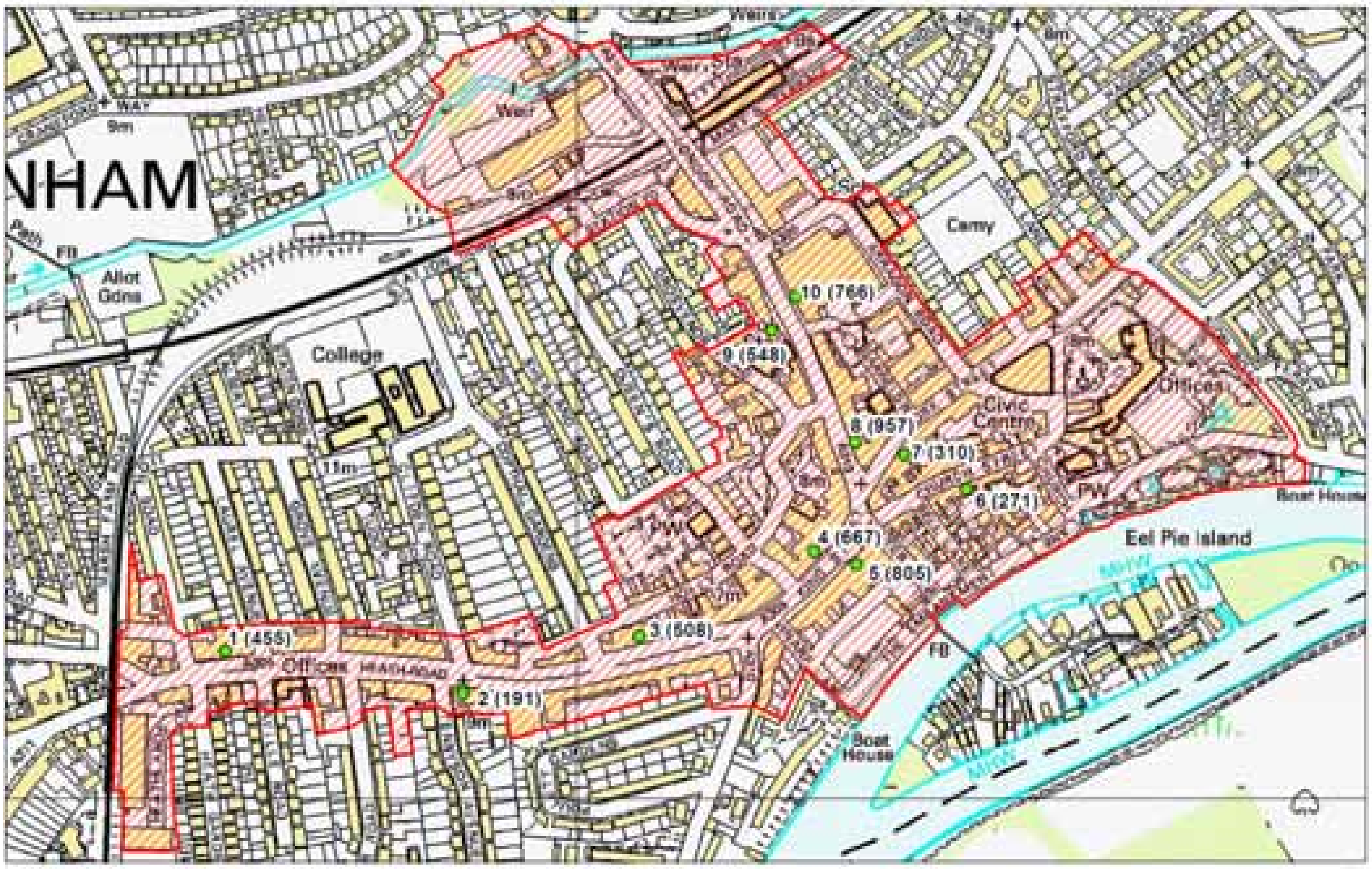
Town centre (best fit with ward)	Number of people
Richmond	12,200
Twickenham	8,700
Teddington	8,300
East Sheen	5,300
Whitton	3,900
Barnes	5,000

Source 2001 Census. © Crown Copyright

3.8 Footfall

Pedestrian flows counts were undertaken at 10 monitoring sites across the centre in March 2011, updating counts undertaken in 2000 and 2006. 9 minute counts were taken at each site which were then factored up to represent an estimated hourly rate. The map below shows the location of the sites and identifies the estimated count at the lunchtime peak. The Table on the following page presents the data in full.

Pedestrian flowcounts in Twickenham (estimated hourly flows1-2 pm in brackets)



 1:4,622

Source: LBRUT Planning Policy & Research

The latest data reveal that the busiest spot is outside of the centre's main supermarket on London Road for both the afternoon (4-5 pm) and evening (7-8 pm) counts, whilst in the morning (10-11 am) the monitoring sites on King Street are busier and at lunchtime outside Santander. There is least footfall in the secondary streets notably on the southern side of Heath Road, Church Street and York Street, the latter is perhaps surprisingly quiet even in the evening despite the number of restaurants and pubs. The site outside Machine Mart (2) is by far the quietest. This may be influenced by the difficulty in crossing the busy road and also by the specialist retailers present (machine tools, timber merchants).

The monitoring site at the far end of Heath Road is relatively busy bearing in mind the distance from the core areas. This may be explained by the number of students passing through this area and in particular by the Tesco Express located in the former Red Lion PH which adds to vitality. This site is significantly busier than in previous counts in 2000 and 2006 prior to its opening.

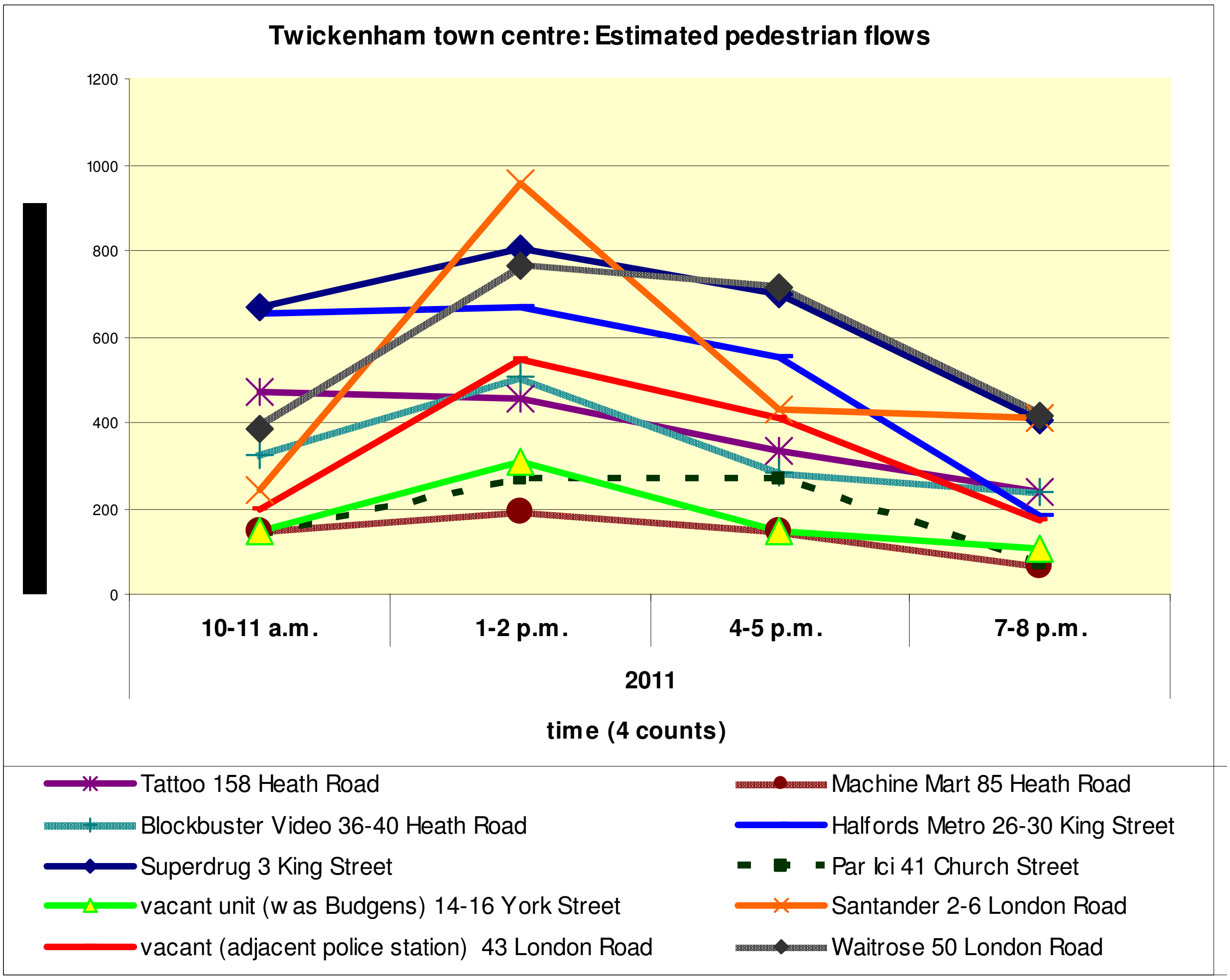
Footfall is down slightly from previous years. See earlier section.

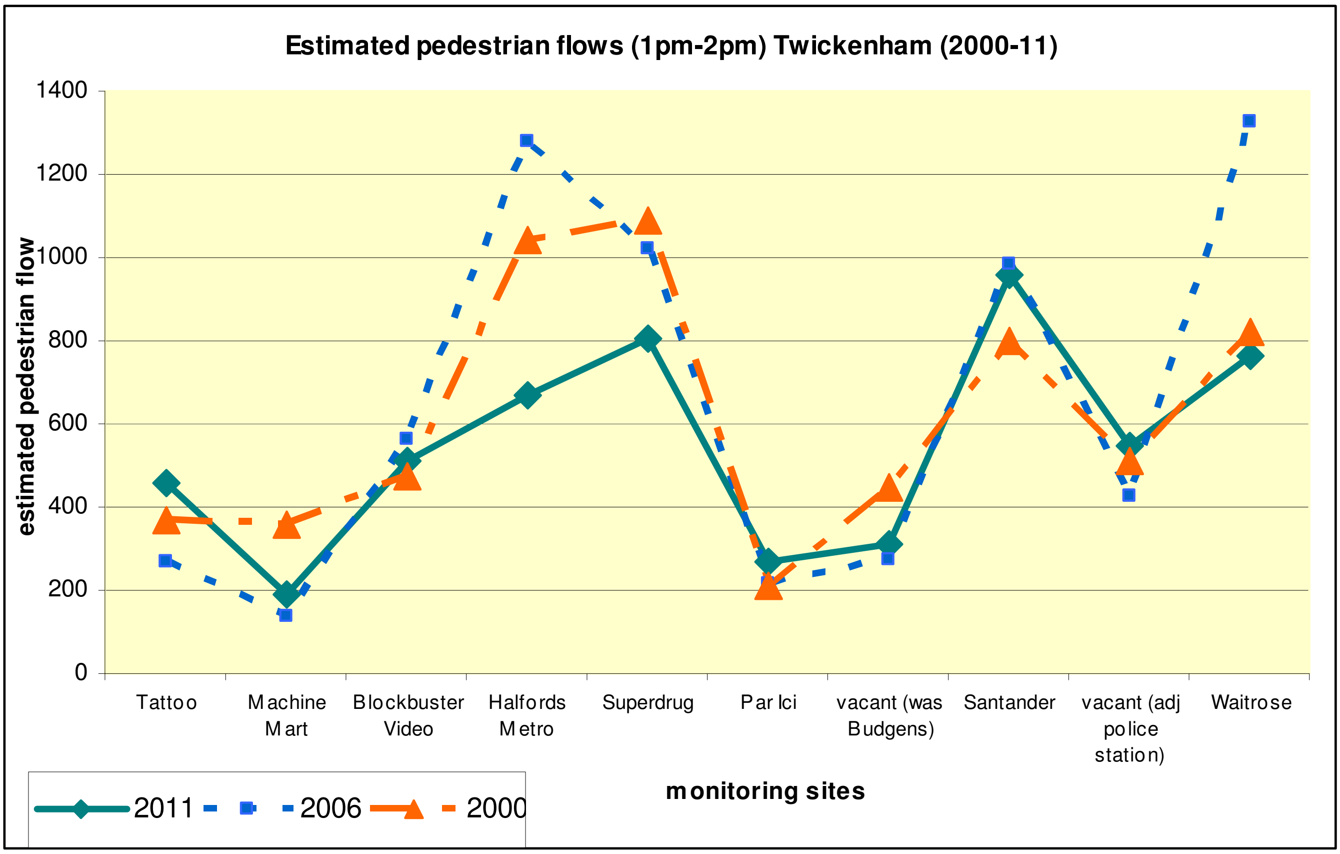
Table 44: Pedestrian counts in Twickenham town centre

Monitoring sites		2011				2006				2000			
Premises name	address	10-11 am	1-2 pm	4-5 pm	7-8 pm	10-11 am	1-2 pm	4-5 pm	7-8 pm	10-11 am	1-2 pm	4-5 pm	7-8 pm
Tattoo	158 Heath Road	469	455	337	238	270	270	282	198	234	366	258	180
Machine Mart	85 Heath Road	145	191	145	66	96	138	108	114	138	360	102	90
Blockbuster Video	36-40 Heath Road	323	508	284	238	288	564	546	324	234	474	276	168
Halfords Metro	26-30 King Street	653	667	554	185	528	1278	900	390	936	1044	960	324
Superdrug	3 King Street	667	805	700	403	606	1020	684	462	582	1092	612	264
Par Ici	41 Church Street	139	271	271	73	120	216	168	120	90	210	174	150
vacant unit (was Budgens)	14-16 York Street	145	310	145	106	114	276	126	54	132	450	198	114
Santander	2-6 London Road	244	957	429	409	408	984	456	486	216	798	546	324
vacant (adjacent police station)	43 London Road	198	548	409	172	258	426	426	270	294	510	318	156
Waitrose	50 London Road	383	766	713	416	666	1326	612	366	366	822	570	360

Source: LBRUT Planning Policy & Research

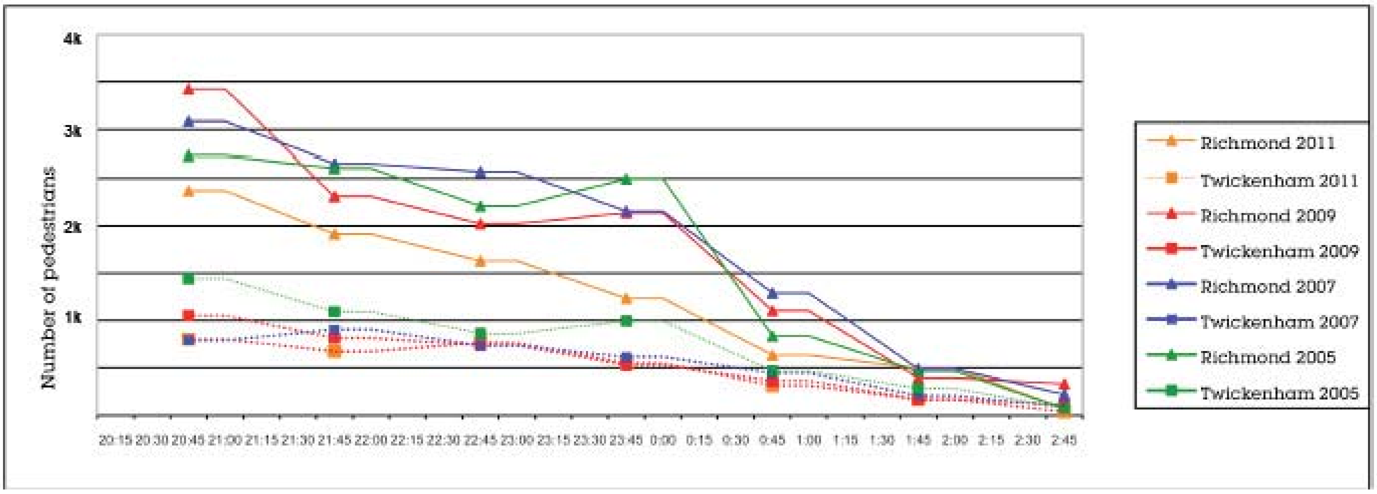
Notes:
Red indicates the highest counts at each session, and blue the lowest.
2011 Survey undertaken on Wednesday 9th March. Weather - cold with some limited rain.
Estimates are extrapolated from 9 minute counts


Twickenham town centre: Estimated pedestrian flows
1200
1000
800
600
400
200
0
10-11 a.m.
1-2 p.m.
4-5 p.m.
7-8 p.m.
2011
time (4 counts)
Tattoo 158 Heath Road
Machine Mart 85 Heath Road
Blockbuster Video 36-40 Heath Road
Halfords Metro 26-30 King Street
Superdrug 3 King Street
Par Ici 41 Church Street
vacant unit (was Budgens) 14-16 York Street
Santander 2-6 London Road
vacant (adjacent police station) 43 London Road
Waitrose 50 London Road


Estimated pedestrian flows (1pm-2pm) Twickenham (2000-11)
estimated pedestrian flow
1400
1200
1000
800
600
400
200
0
Tattoo
Machine Mart
Blockbuster Video
Halfords Metro
Superdrug
Par Ici
vacant (was Budgens)
Santander
vacant (adj police station)
Waitrose
monitoring sites
2011
2006
2000

Pedestrian flow in the evening

Richmond and Twickenham: Pedestrian counts 2005, 2007, 2009 and 2011



Source: Make Associates, Measuring Cumulative Impact in Richmond and Twickenham 2011, published June 2011. © Copyright Make Associates

Research undertaken by Make Associates (formerly Erskine) on behalf of the Council suggest that evening and late night pedestrian flows in Twickenham are similar to previous years although 10% lower.

However, it should be noted that the purpose of the count in this study is to give a comparable indicator of "busy-ness" (to set against incidents of crime and anti-social behaviour) rather than a measure of unique users[24]. Nevertheless, it does show that numbers in the early hours in Twickenham are relatively small.

[24] Extract from Make Associates Report- It is important to note that a pedestrian count is not a count of unique users in the town centre – it is a count of users passing specific points over a 10 minute period each hour. Therefore, there will be duplication (people passing the same point twice or two different points over the course of an evening). However, because the count takes place over 10 minutes every hour, on balance the figure is likely to underestimate the number of unique users of the town centre over the course of an evening.

3.9 Accessibility & parking

Table 45: Bus Routes through Twickenham

	number of buses per hour							**List of key centres passed through**
	Monday to Friday			Saturday		Sunday		
Service Number	Peak	Off peak	Eves	Day	Eves	Day	Eves	
H22	5	5	3	5	3	3	3	Hounslow, Whitton, Twickenham, Richmond.
R62	1	1	0	1	0	0	0	Twickenham, Whitton
R68	4	4	3	4	3	4	3	Hampton Court, Teddington, Twickenham, Richmond
R70	6	6	5	6	3	3	3	Richmond, Twickenham
33	7	7	4	7	6	7	4	Hammersmith, East Sheen, Richmond, Twickenham, Teddington
110	3	3	2	3	2	2	2	Twickenham, Hounslow
267	5-6	4	3	4	3	4	3	Hammersmith, Twickenham
281	8	8	5	8	5	5	5	Kingston, Teddington, Twickenham, Whitton, Hounslow
290	3	3	2	3	2	2	2	Hanbury, Twickenham, Staines, Sunbury, Ashford

Source LBRuT Transport
Notes
* = Buses on route 33 run more frequently between Richmond and Hammersmith at the times indicated

Twickenham has nine bus routes, the 281 & 33 being 24 hour services. Twickenham has 16 trains per hour and is relatively well-served.

Table 46: Train Routes - Twickenham

	Trains per hour
Twickenham	
London Waterloo loop (via Kingston)	2
London Waterloo loop (via Hounslow)	2
to Windsor and Eton Riverside	2
to Reading	2
Total number of trains through Twickenham	***16***

Source: LBRuT Transport

Table 47: Car parking provision in main town centres

Church Lane	Operated by Council. Max stay 2 hours during operational hours	30 cars
Holly Road	Operated by Council. Max stay 4 hours during operational hours	171 cars, 1 motorcycle
Ryde House	Operated by Council. Max stay 4 hours during operational hours	52 cars, 1 disabled
York House	Max stay 2 hours, during operational hours	29 cars, 3 disabled
Arragon Road multi-storey	Operated by Council.	437 Car, 3 Disabled
Twickenham Railway Station	Long stay available	40 car

Source: LBRuT Transport
Full information on Council run car parks in Twickenham can be found at the following web address
http://www.richmond.gov.uk/home/transport_and_streets/parking/car_parks/content-parking_twickenham_area_car_parks.htm

3.10 Customer and resident's views

There are a number of sources of information on this subject. It should be noted that the Council has produced a document which pulls together the results of various recent consultations in relation to Twickenham including the Barefoot Consultation (22-24 July 2010) and Twickenham Conference[25] (Saturday 30th October 2010) which provides insights into the views of residents and users of Twickenham.

Headline issues raised at various events & consultations:

- Traffic domination needs solution, lack of focal area. Increase pedestrianisation. Increase accessibility. Address parking.
- Development of town's attractiveness and identity – linked to following point -
- No connection to river – a major under-used asset - not visible from most of town centre. Removal of parking to open up riverside. And also linking to York House Gardens.
- Comprehensive development of town centre, (several sites have development opportunity), particularly linking redevelopment at Station, Post Office Sorting Office, Regal House
- Diversification of evening economy, need for further entertainment, leisure and community facilities particularly for families
- Encourage specialist shopping. Possible relocation of farmer's market to redeveloped Riverside
- Encourage tourism, better tie-in to rugby experience
- Co-ordinated improvements to streetscene needed which reflects the town's history - repositioning of bus stops, signage, lighting etc

Business Survey:

Results of the All in One Business Survey were available in April 2011. 237 completed surveys were submitted. 35 respondents were from Twickenham Village which is illustrated in the following map (12 of which were home-based and only 3 retailers) and thus the results should be treated with a degree of caution.

25 http://www.richmond.gov.uk/home/council_government_and_democracy/council/consulation_and_feedback/council_consultations/twickenham_barefoot_consultation/twickenham_conference.htm

Key data:

- The main reasons why they choose to locate in the borough are – close to owners residence (43%), access to customers (31%), availability of the right premises (29%) and transport links to London (17%)
- 60% said they did not have difficulties finding the right premises.
- There was a mix of responses to the question about the geography of their market – 23% described it as 'your immediate area', 51% as 'local, but wider than the immediate area', 26% - regional, 26% - national, and 14% - international.
- Compared with the previous year 29% of businesses felt turnover had increased, 40% that it had decreased, and 29% that it was about the same.
- In the next 12 months 26% felt their business would improve, 11% that it would decline with most, 46%, that it would stay the same.
- 51% were considering expansion in the near future, compared to 38% for all businesses in the survey (borough-wide). However only 1 of which was looking for bigger premises.
- Three quarters were not considering moving out of the borough in the next 12 months. 66% were not considering closing in the next 12 months.
- Various factors were cited as to why the area is a good place to do business, 26% attributed it to transport/infrastructure, 17% local demand/ right demographics/large market for product and the same percentage for quality of life/ environment issues.
- 57% agreed that they were satisfied with the local area as a place to do business.
- In response to the question 'Which things are MOST IMPORTANT in making your local area a good place to do business?', 86% cited transport and access, 46% mentioning public transport and 43% provision of parking spaces. 71% cited business development and promotion.
- However, it was also thought that there was room for improvement in some areas, notably parking, road access and travel congestion, reducing the number of empty shops, improving the range and quality of shops and developing a stronger sense of place for the business community.

<u>All in One Survey</u> results are reported in the separate document Summary of Twickenham Issues available on the Council's website.
The top line top line information for the Twickenham area is as follows:
In Twickenham 88% were satisfied with the area as a place to live. The things that were most important in making it a good place to live included:

- Local parks and open spaces – 70%
- Level of crime and anti-social behaviour – 38%
- Public transport – 33%
- Shopping in your local high street – 30%
- Education and schools – 25%

The things that most needed improving in the area included:

- Shopping in your local high street – 47%
- Traffic and/or level of congestion – 32%
- Condition of pavements – 22%
- Provision of parking – 22%
- Level of crime and anti-social behaviour – 19%

As part of the process of progressing a Business Improvement District for Twickenham[26] a survey of business rate payers was undertaken in 2012[27]. Further survey work is expected. However, some of the issues identified are:

- Nearly 60% thought that Town Centre events were important to their business with only 17% thinking they were not important. When asked if events actually helped their business just over 40%% stated that it did to some degree. When asked for suggestions for events, these included more regular music, events, specialist markets, food events, community events.
- There was a high level of importance attached to removal of litter, trade waste, graffiti and street cleanliness and maintenance (over 85% plus). Town Centre Signage also rated highly.
- In terms of safety & security, prevention of anti-social behaviour, property damage, shoplifting and the perception of safety and security seen as the key areas to address. The Townwatch and Pubwatch Schemes were seen as important or more by over 80% of respondents.

[26] The BID proposed boundary extends further than the town centre boundary into Twickenham Green.
[27] © Mosaic Futures Limited.

- In terms of access, car parking availability and pricing alongside access in to the Town centre seem the most important issues.
- There is strong interest in central procurement particularly in relation to TradeWaste, Recycling and Advertising Space/Time

A further Study, reporting on a questionnaire to businesses was also produced by the MOSAIC Partnership in Spring 2013 to further develop the BID. Of those that responded:

- Over 50% had operated in Twickenham for more than 10 years.
- The most sort after marketing and promotional activity was the development of a town centre website.
- Increased street cleaning and the cleaning of doorways were considered important
- The following factors were considered most important in reducing vacant units: encouraging landlords to reduce/discount rents, renovation of unattractive shop fronts and providing financial incentives to new businesses
- Additional CCTV and crime reduction initiatives were considered important
- Support for car parking promotions came form over three quarters of respondents.

3.11 ASB reporting and occurrence of crime

(a) Research on antisocial behaviour to inform Licensing policies – observational reporting
In 2011 Makes Associates updated earlier research on anti-social behaviour initially commissioned to inform the development of the Council's Licensing Policy. The Study collected observational data on incidents of ASB for Richmond and Twickenham town centres.
For Twickenham town centre the conclusions were:

- As in Richmond, during 2011 Twickenham has seen a small decline in incident numbers - from 192 to 165.
- It is worth noting that while Richmond has remained consistently busy over the three study periods (until 2011
- when visitor numbers dipped), Twickenham has not regained the visitors, which it lost between 2005
- and 2007. Indeed, these have fallen further in 2011, though by smaller numbers than Richmond.
- Rowdiness and urinations fell in Twickenham 2011 after increases in 2009.
- In Twickenham, crime and disorder is relatively evenly spread across the town centre. However, KFC remains an individual hotspot attracting young (mainly underage) people, often drinking alcohol (not on the premises but outside), to congregate nearby and cause public order disturbances.

(b) Anti Social Behaviour (ASB) levels – complaint reporting
Data on Anti Social Behaviour levels reported to the Council for the period 2011-12 are available for the main town centre wards. ASB is gathered every month from three council databases which makes amalgamating data more difficult. The data provided covers 80% of the ASB total for the year.

Key facts for the borough as a whole are presented in the relevant section for Richmond town centre. Much of the reporting relates to littering, and usually occurs after 8pm on weekends. ASB reporting is based on perception and is therefore subjective. Most reports are concerned with "Environmental ASB", relating to a physical location rather than a person. Reports concerning the later are usually addressed directly to the police. "Environmental ASB" includes littering and fly tipping. However one-fifth of calls related to Noise, which is nine times out of ten an issue with human interaction and tolerance levels.

Of the three main ASB categories[28], barely 1% of council ASB calls/reports fall under the most serious category Level One (Personal). Around 14% of calls fall under Level Two (Nuisance) and 85% of calls/reports fall under the least serious category Level Three (Environmental).

[28] Personal : 'Personal' is designed to identify ASB incidents that the caller, call-handler or anyone else perceives as either deliberately targeted at an individual or group or having an impact on an individual or group rather than the community at large.
Nuisance: 'Nuisance' captures those incidents where an act, condition, thing or person causes trouble, annoyance, inconvenience, offence or suffering to the local community in general rather than to individual victims
Environmental: 'Environmental' deals with the interface between people and places. It includes incidents where individuals and groups have an impact on their surroundings including natural, built and social environments.

Table 48: ASB Reporting - Twickenham 2011/12

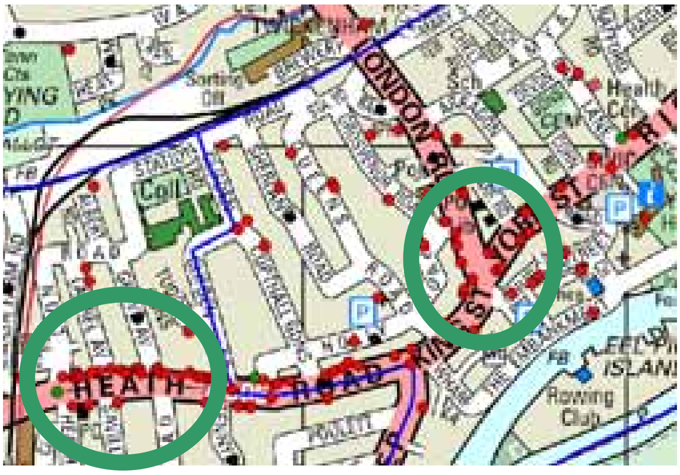
Centre	Number of ASB reports in centre	Environs*1	% ASB taking place in centre	ASB Level
Barnes	42	182	22%	Low
Whitton	42	137	31%	Low
East Sheen	127	288	44%	Medium
Teddington	62	240	26%	Low
Twickenham	219	390	59%	Medium-High
Richmond	276	471	59%	Medium-High

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Notes *1 = covers the area around the main town centres, which is not the entire ward, as defined by the Community Safety Data Analyst

All levels of ASB reported to the Council are quoted are relative to the borough and not pan-London. If these town centres were compared to local town centres such as Kingston, Hounslow or Hammersmith, they would all be classified as Low.

Map of ASB calls/ incidents in Twickenham town centre area 2011/12



Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Notes
1. These maps are a pictorial illustration and do not show all the ASB recorded in the total figure. Ward level identification has been used when mapping co-ordinates are not available. The green circle indicates the ASB hotspot.

Key findings:
- Like Richmond town centre, Twickenham has a variety of ASB types, as opposed to the smaller town centres.
- There were 219 reports of ASB in Richmond town centre during 2011-12, which is an average of 18 calls/reports per month.
- The main type of ASB reported was litter, closely followed by noise.
- There were 370 ASB reports in the wider area surrounding the centre during 2011-12, therefore 59 % of all ASB is recorded as having taken place in the centre itself. This is high compared to other centres (see Table), with the exception of Richmond town centre. Both have well-developed evening economies.
- Twickenham Town Centre has medium to high levels of ASB, although as with all other town centres, the report categories fall mainly into the lowest classification.

(c) Crime levels in town centre wards

The following table shows crime levels for the main wards linked to the town centres, where the town centre is more than 75% contained in a ward boundary. It reflects the trends and emerging crime situation in the vicinity of these areas.

The following tables compares the “Volume Crimes”, those which are most prolific, for 3 wards which encompass Teddington, Twickenham and Richmond town centres. They are the crimes which are typical to town centre locations and which are most prolific in the borough.

Crime which is Violence Against the Person has seen a rise across the London boroughs due to changes in recording, which would explain why every town centre ward has shown an increase on this table. Nevertheless in Twickenham Riverside ward total crime has risen, as has theft and handling. As might be expected total crime is lower than in South Richmond ward, but significantly higher than Teddington.

Table 49: Crime levels in selected town centre wards

	violence against the person			theft & handling			total crimes		
Ward	Q1 2011/12	Q1 2012/13	Change	Q1 2011/12	Q1 2012/13	Change	Q1 2011/12	Q1 2012/13	Change
Teddington	15	20	5	74	49	-25	144	129	-15
Twickenham Riverside	40	44	4	75	95	20	197	211	14
South Richmond	53	67	14	193	205	12	356	389	33

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Alcohol-related crime

Alcohol-related incident data are reported at ward level in Appendix E of the Council's Licensing Policy published in January 2011. Data on alcohol related calls to the London Ambulance Service reveal that in the financial year 07/08 7.7% (74) of incidents related to Twickenham Riverside ward, 11.2% in FY 08/09 (107) and 8.9% in FY 09/10 (87). South Richmond ward has more.

Overall alcohol related offences[29] in Twickenham Riverside have increased significantly over the corresponding time period, with 59 offences recorded in FY 07/08, 61 in FY 08/09 and increasing sharply to 83 in FY 09/10. Again, levels are lower than the Richmond equivalent.

It also reports on offences for which a licensed premises is named as a venue in the financial year 2009/10. In Twickenham The William Webb Ellis and the Grand Union PHs each accounted for over 3% of such offences in the borough.

(d) Perception of safety and use of centre in the evening

The full dataset is presented in section x. Of the Survey of 1,000 households, some 13.5% of those respondents who specified a centre, identified Twickenham as a location where they felt unsafe in the evening or after dark. Only Kingston and Richmond were specified by more respondents. Perhaps not surprisingly people identified Twickenham as the centre most often visited for eating and drinking. Only Richmond, and in the case of restaurants, Teddington were ranked higher.

3.12 State of the town centre: environmental quality

Overall, Twickenham town centre has 5 designated Public Open Spaces and 5 sites designated as Other Open Land of Townscape Importance, including some Metropolitan Open Land along the River Crane and River Thames. The town centre is also rich in historic assets with 35 Listed Buildings, 132 Buildings of Townscape Merit and a registered Historic Park & Garden (York House). In addition, approximately one third of the town centre falls within three different Conservation Areas. As Twickenham town centre has some very urban areas, the air quality exceeds in most locations the objective. There are three diffusion tubes within the town centre, whereby the worst air quality has been measured in King Street, followed by Heath Road and Civic Centre, which all have levels above the objective.

The environmental quality of Twickenham town centre has been assessed by dividing the centre into eight areas: (1) Heath Road, (2) King Street, Cross Deep, (3) Church Street, Twickenham riverside, embankment, (4) York Street, back of Church Street, (5) Civic area, York House and Gardens, including Champions Wharf, (6) London Road (south of Regal House), York Street, Arragon Road, (7) Twickenham station and surroundings, including Regal House, and (8) Holly Road, including car park and Queen's House. See Appendix 4 in Separate document for a map of the areas that have been surveyed. It should be noted that Twickenham is subject to the Twickenham Area Action Plan, which sets out policies, proposals and improvements for the town centre.

The western end of the town centre, **Heath Road (Area 1)** has been subject to a streetscape upgrade in 2004 and thus the paving, conditions and quality of pavements, roads and street furniture is generally good, with the exception of some patchy parts and forecourts that are at different heights. The traffic along Heath Road can be very heavy at times but there are several designated pedestrian crossings. There were no fly-posting or graffiti issues, but some minor litter and fly-tipping problems. Despite several green boxes, signs, boards etc., the area does not feel too cluttered. Overall, the environmental quality of this area is good with well positioned trees and good public realm; exceptions are the underpass at the end of Heath Road that feels slightly unpleasant and some dilapidated sites and shopfronts that need attention.

The **core of Twickenham (Area 2)** is pivotal in the town centre but it is heavily impacted by motorised traffic (particularly cars and buses). The environment for pedestrians is very unfriendly; there are some dangerous crossing points and pavements are of insufficient width, particularly by the bus stops and green grocer. There is very limited

[29] The report includes details of limitations of this data, the recording of which is subject to the recording officer's discretion and interpretation which is known to be inaccurate, and therefore the data should be considered to be a guide and not definitive.

planting and street tree provision, thus providing a poor contrast to Heath Road. There are also lots of clutter and litter problems as well as some minor fly-posting/graffiti and fly-tipping issues. The majority of the street furniture is old and outdated, with the exception of the newly installed lighting and bus shelters. Overall, this area has a down market feel and the design and public realm of this area is of generally poor.

Twickenham riverside, the embankment and Church Street (Area 3) provide a stark contrast to the core of the town centre. Despite some congested and narrow lanes with insufficient vegetation, there are good passageways for pedestrians. Part of the embankment has recently been upgraded and is very welcoming and pleasant with good quality tree planting and soft landscaping; the other part is in need of upgrading. Church Street is considered to be the best townscape in Twickenham. No litter, fly-posting, graffiti, fly-tipping or street clutter problems were recorded, and the provision and quality of street furniture is good. Despite the area being impacted by traffic and car parking, it offers a retreat from the much busier core retail area.

The environmental quality of **York Street and back areas of Church Street (Area 4)** is reasonable, despite the area being impacted by traffic and containing some dull parts behind the shops. Some pavements are of insufficient width (e.g. by Barclays Bank) and there are some dangerous crossing points (pedestrian and vehicular conflicts). There is very limited tree planting and some of the street furniture is outdated (e.g. old railings). There are no significant issues in relation to street clutter, litter and no problems with regard to fly-posting, graffiti or fly-tipping.

The **civic area, York House and its Gardens (Area 5)** are considered to be very pleasant areas, with lots of parks and open spaces and some high quality historic buildings. Champions Wharf is however in need of upgrading and currently subject to a Parks Improvement Programme. There are no issues in this area regarding litter, fly-tipping and street clutter.

London Road (Area 6) is a very busy, noisy and traffic-impacted environment. There is limited street tree planting, except outside Waitrose and some new landscaping by Premier House. Whilst the majority of pavements in Arragon Road have been resurfaced, the paving along London Road is very patchy and in need of upgrading. The street furniture is generally of moderate quality and London Road in particular has some street clutter problems (e.g. railings, green boxes, signs, board, adverts etc). Overall, the environmental quality of the area is moderate; there are some poor quality buildings along London Road and the open space in Garfield road is also very poor (this is now subject to a Parks Improvement Programme).

Twickenham station and surroundings (Area 7) is also very busy and traffic-dominated, with unpleasant noise levels. The pedestrian environment is unfriendly due to some difficult crossings, pavements of insufficient width and patchy surfacing. This area has litter problems and some graffiti was recorded on the station building. The street furniture is generally of poor quality and there is lots of street clutter, including cycles chained to railings that cause obstructions to pavements. Overall, the area feels somewhat unpleasant due to poor quality buildings (e.g. station, sorting office), neglected areas such as Station Yard and moderate public realm quality.

Holly Road (Area 8) is mainly a service area and plays a secondary town centre role. The road and pavements are very narrow and patchy. Given the constrained area, the vegetation and landscaping is generally good, particularly Holly Road Garden of Rest, which features some very mature trees. There are some major litter issues along the road as well as in Holly Road car park, which is the only area in this part of the town that has recently been resurfaced. On the day of the survey, fly-tipping was also recorded. Overall, there are some dilapidated buildings, “untidy” areas, particularly at the rear of buildings/shops, and therefore the area is rather unpleasant.

See Appendix 3 of the separate document for the detailed results of the desk-based assessment, including analysis of open spaces, historic assets, air quality etc.

The individual survey sheets for the areas assessed can be found in Appendix 5 of the main report published separately.

3.13 Implementation of proposal sites

Proposal sites which have been formally saved from the UDP remain part of the development plan until superseded by the Site Allocations DPD on which production is underway. Please note the Twickenham Area Action Plan which is subject to Examination in Public beginning on 12th February 2013, which includes a number of proposal sites in the Twickenham.

Table 50: Implementation of UDP Proposal Sites in Twickenham town centre boundary

Proposal site		Description	Progress in 2007/08	Progress in 2008/09	Progress in 2009/10	Progress in 2010/11	Progress in 2011/12
T1	Twickenham Riverside	enhancement of riverside and shopping area, leisure uses, housing, improvements to rear servicing, car parking, public conveniences	not implemented	not implemented	not implemented	not implemented	not implemented
T3	Post Office Sorting Office, London Road	public service/ mixed use	not implemented	not implemented	not implemented	not implemented	not implemented. Planning

Proposal site		Description	Progress in 2007/08	Progress in 2008/09	Progress in 2009/10	Progress in 2010/11	Progress in 2011/12
							application still expected in Dec 2012
T5	Garfield Road	pedestrian priority area, shared use, landscaping	not implemented	not implemented	not implemented. Some improvements have been undertaken.	not implemented. Some improvements have been undertaken.	not implemented. Some improvements have been undertaken.
T6	Church Street	limited pedestrianisation	implemented	implemented	implemented	implemented	implemented
T11	The Embankment, Twickenham	passenger boat landing stage	not implemented	not implemented	not implemented	not implemented	not implemented
T14	Craneford Way Depot	depot facilities/ residential	not implemented	not implemented	not implemented	not implemented	not implemented
T15	Holly Road	improvements to rear servicing	not implemented	not implemented	not implemented	not implemented	not implemented
T17	Twickenham Railway Station	town centre mixed use, interchange improvements, booking hall, riverside walk	not implemented	not implemented	not implemented. Application being determined.	not implemented. Application being determined.	Application approved. Judicial review Dec 2012
T23	Station Yard	car free housing/ business use	not implemented	not implemented	not implemented	not implemented	not implemented

Source: Extract from Appendix of Annual Monitoring Report 2011/12

3.14 Completions and commitments

Table 51: Use Class (shop) completions in Twickenham town centre boundary 1/10/2007 to 1/4/2012

			New completed floorspace 1*			**Net additional floorspace 2* (taking account of losses)**		
application ref	address	summary of proposal	new completed floorspace (m2) (gross external)	new gross internal floorspace m2 3* (gross internal)	of which net tradable floorspace m2 4* (gross internal)	net additional floorspace (gross external)	net additional floorspace (gross internal)	of which net tradable floorspace
08/1453/FUL	92 Heath Road, Twickenham	Rear store converted to studio flat and rear courtyard converted to studio flat. ….				-56	-53.9	2.0
10/3043/COU	57 York Street, Twickenham	Change of use of the ground floor from Class A1 to tattoo artist shop (sui generis)				-65.0	-62.6	-61
10/2265/COU	154 Heath Road, Twickenham	Change of Use from Retail (A1) to Tattoo Parlour (Sui-Generis).				-41.0	-39.5	-36
08/2690	36-37 Church Street, Twickenham	Change of use of rear of shop at No. 37 to A3 restaurant use, in connection with No. 36. Retention of front of No. 37 as A1 retail use.				-15	-14.4	-14.4
08/3195	16-18 London Road, Twickenham	Change of use of second & third floors from storage ancillary to the ground floor shop to uses ancillary to the Physiotherapy and Sports Injury Clinic on the first floor .				-203	-195.4	0.0
06/3772/COU	15 London Road	Change of use to mixed A1/A3				-124	-119.4	**-95.5**
06/264	156 Heath Road	Proposed Change Of Use To Rear Of Retail Unit For One New Flat And Ground Floor Rear Extension; Proposed Subdivison Of 2 Upper Floor Flats To Form 4 No. Units. Change Of Use To Retail Unit To Include A1/A2 Use. Demolition Of Existing Rear Storage Sheds Used For Retail Use And WC.	-	-	-	**-28**	-27.0	**-21.6**
05/3197	90 Queens Road, Twickenham	Change of use of part of B1 office to A1 use.	19	18.3	16.8	19	18.3	16.8
05/2132	35 Heath Road, Twickenham	Change of use from A1 to A2	-	-	-	-84	-80.9	-62.0
08/1104	110 Heath Road	Continued use of premises as mixed use (Class A1 / A3)*5						
06/2772	21 King Street	Change of use to coffee shop (mixed A1/A3 use).				-116	-111.7	**-89.3**
11/1911/FUL	164 Heath Road, Twickenham	Proposed Change Of Use Of The Property From A1 Use to A2 Use.				-57	-54.9	**-43.9**
11/0105/FUL	5 London Road	Change of use from A1 to A1/D1 (massage) use.				-17	-16.4	0
		TOTAL	19	18.3	16.8	-787.0	-757.5	-404.9

Source : LBRuT Decisions Analysis system. Produced by Planning Policy Section.

Notes:

1* - New floorspace completions plus gains from change of use and conversions
2* - Net additional floorspace - takes account of losses and gains
3* Difference between gross external and gross internal floorspace defined by DCLG as 3.75%
4* Net tradable floorspace is the amount of gross internal floorspace which is trading floorspace i.e. sales space which customers have access to. Where retail sales area of either the existing or proposed development, or both is not known a proxy is calculated using a 80/20 ratio **(identified in bold)**
5* Figures not included as this is a continuation of an existing use.

The figures clearly show that overall there has been a net loss in retail floorspace in Twickenham in recent years, primarily through change of use – to a range of land uses. The centre is diversifying. Only one completed development has added floorspace, which was minimal. The table below indicates that at this point in time there are two comparatively substantial commitments in the pipeline, although still relatively modest if looking at the wider picture. The permission at the Station site is flexible.

Commitments

Table 52: Commitments in pipeline (additional retail) in Richmond town centre (outstanding at Apr 2012)

				Additional retail in pipeline		
application ref	decision date	address	Proposal	approx retail sales area m2	Ancillary retail m2	total m2
10/0415/FUL	03-Aug-10	121 Heath Road Twickenham TW1 4BE**	Redevelopment of the site to provide 22 no. flats and an A1 retail unit at ground floor, car parking with internal access road thereto, cycle, refuse and recycling facilities, landscaping and associated works.		n/k	434
11/1443/FUL	30/03/2012	Twickenham Railway Station	Station redevelopment including 734 sq.m of **flexible Use Class A1 (shops), A2 (Financial and Professional Services) and A3 (restaurant and cafe) floorspace**		n/k	734
			TOTAL	**0**	**0**	**1168**

** - Planning application currently being determined. Validated 12/3/2013 - proposed use of the ground floor to include A1, A2, A3 (Part Only), B1, D1 and D2 use classes.

Source: LBRuT Decisions Analysis system. Produced by Planning Policy Section **.**
Notes: Table includes additional space only, not where there is a reduction in retail space.

3.15 Potential for growth & change

The Council commissioned consultants GVA Grimley to produce a retail capacity study forming part of the evidence base for the LDF. Details of this study are presented in section 2.15.

The **qualitative assessment** for Twickenham suggested the centre provided a good range of shops and services and had experienced recent investment at the time. There were fewer comparison (non-food) outlets and considerably greater representation in the restaurants & licensed premises sector. Vacancy rates were low & rents rising. There was strong retailer demand although dominated by A3/A4/A5 (restaurants & cafes/pubs/takeaways) service uses. This qualitative assessment was produced before the recession and is updated by subsequent health checks[30], including this.

The revised assessment (2009) suggests a pattern which is broadly the same as the earlier assessment. See Table 34 for capacity forecasts for all town centres. For Twickenham the revised forecasts suggest **negative capacity** (-310 m2 net) **for convenience** (food) floorspace by 2016, which is still the case in 2021 (-136m2 net)[31]. After this point a minimum amount of capacity arises, although such long range forecasts should be treated with caution. For **comparison goods** Twickenham has an **estimated capacity of 226m^2 in 2016 rising to 755m^2 by 2021 net**[32]. The net figures can be translated into gross town centre floorspace (including non-sales areas) by applying an appropriate gross to net ratio (65%). The gross figure also includes a further 15% for A3, A4 and A5 uses in the scheme, making a total ratio of c 80/20[33]. **Gross capacity is also forecast as 410 m^2 by 2016 and 1,367 m^2 by 2021**. Overall, therefore the current research suggests **limited quantitative need to provide retail floorspace in the town centre.**

The Study concludes that in general, proposals coming forward should be directed to the borough's town centres in the first instance. The scale of such development should be considered, as should the implications for existing floorspace and the potential to clawback money leaking from the catchment area. Since a proportion of the capacity arises from out of centre development, and bearing in mind that town centre sites should be considered first, there is potential to support more floorspace than identified in the analysis. It goes on to say that the Council should be proactive in planning for the borough's town centres bearing in mind the potential threat from Westfield shopping centre.

Scope for development

Twickenham was considered to be an improving but potentially vulnerable town centre. It was recommended that UDP shopping frontage designations should be carried through to the LDF, and there should be stringent application of policies to avoid dominance of service uses. The consultants considered that the majority of the comparison goods expenditure within the Twickenham catchment is spent in higher order centres (such as Kingston), and went on to state

[30] as part of the Analysis of Town and Local Centres 1996/7 (Incorporating Health Checks for main town centres) - http://www.richmond.gov.uk/ldf_research_analysis_of_town_centres_final_distilled.pdf)
[31] Residual expenditure is converted to floorspace using a sales density of £10,000 per m2, a minimum level required by most major food retailers.
[32] Assuming new comparison floorspace achieves a sales density of c. £5,000m2 net.
[33] It does not include leisure floorspace

that "it is unlikely that Twickenham (would) be able to claw back significant amounts of trade, particularly in clothing and luxury/personal goods categories." (para 8.31). It was recommended that the LDF should seek to consolidate the centre supported by environmental improvements and that existing space could by recycled via amalgamation to provide better space which may generate renewed interest. However, observations made above on the availability of additional capacity should be borne in mind and planning applications will be determined on their merits.

As part of the Study a number of sites were assessed in each town centre on the basis of an initial appraisal only and future viability testing was anticipated. The selection was not necessarily exhaustive & site boundaries only indicative. Recommendations:

- Post Office Sorting Office, London Road (now vacant) / Twickenham station/ Regal House (now with planning permission for hotel) all beyond core retail area. Not the most appropriate locations for retail floorspace.
- Twickenham Riverside – UDP proposal should be taken forward (limited retail)
- Timber Yard/CAB Heath Rd & Government offices, Heath Road– beyond core shopping area but within or adjacent to secondary shopping frontage. Are appropriate, although demand from retailers would need to be tested.
- Police station, & 3 car parks to the rear of London Rd – could be integrated with key frontages, latter would need analysis of land ownership issues.
- Telephone exchange, Arragon Rd – possible site for mixed use.

The Council will look more closely at sites as part of the preparation for the Site Allocations DPD.

3.16 Town centre management & economic development

Twickenham benefited from significant investment in its town centre offer. In 2011, the town was awarded £496,000 from the Outer London Fund, adding impetus to the Council's own strategic plans and galvanising interest in issues amongst the business community.

This investment supported improvements to many shop fronts and associated architectural features which have enhanced the visual appeal of parts of the town's frontages. Outdated lamp columns have been replaced throughout the town centre, the new columns providing better quality lighting while adding character through their period design. A new business association supported through the OLF is growing in stature and starting to deliver for businesses. Cultural and Christmas events are always popular in Twickenham and this was also the case for OLF-funded programmes. 5000 people attended the Holi Festival of colour in summer 2012 and the Literary Salon, making use of an empty shop, pulled in hundreds of visitors.

The funding also supported initial work to explore a Business Improvement District in the town. Subject to a successful 'yes' vote in the autumn, the BID company would come into being towards the end of 2013.

On the edge of the town centre, a section Twickenham Embankment area was transformed in 2012 from a derelict swimming pool to an attractive public park with river views. Significant design work has been undertaken to set out plans for more radical changes needed to transform the whole town centre, easing traffic flows and enhancing the pedestrian experience. Council-funded implementation work is due to commence in 2013.

As improvements take place it will be important to ensure that and short-term negative impacts are mitigated against as far as possible to protect retailers operating in today's difficult economic conditions.

Summary

Twickenham's role as a district centre is essentially to provide for local shopping needs, including for those without access to a car. It has food shopping provision which is in line with the UK average, but a more limited non-food retail offer. However, it still retains independent retailers in both sectors. It has a strong eating and drinking offer. The centre boasts 40,000ft^2 of both pubs and restaurants and a further 19,500ft^2 of cafes, which is a growing sector. This is an important part of its prosperity and no doubt reflects the presence of the RFU and Twickenham's role as an employment centre.

Vacancy rates are often regarded as a key indicator in assessing the health of centres. Since the recession Twickenham's vacancy rates have consistently been above the average for the main centres. 2011 rates were higher than for a decade, although since 2011 have dropped again to 8.7% in 2012 (by 30 to 26 units). However, rates remain well below the UK average of approx 15%. One year's improvement in vacancy rates can't be considered a trend. However, there are other positive signs, prime rents are starting to rise and Colliers International's town centre performance index categorises Twickenham as an "improving centre".

Whilst some indicators might suggest guarded optimism, others are less positive. Footfall appears to be falling, certainly in parts of the centre, whilst rising elsewhere. Although crime is relatively low on a regional scale, it is high compared to other borough centres. Much of the anti-social behaviour reporting to the Council is concerned with litter and noise.

Twickenham has a large number of charity shops compared to other centres in the borough (although this has always been the case). There are fewer multiples in the comparison goods sector although multiples in other sectors are greater than the UK average. Both of these characteristics probably reflect the centre's proximity to Richmond and Kingston.

Twickenham has benefited from spending on public realm improvements, including the laying out of the Diamond Jubilee Park and opening up of most of the site for public use, which has improved the centre, and this programme of upgrading continues. Crucially, the Twickenham Town Area Action Plan is expected to be adopted in Summer 2013 which will provide the framework for the further development of the centre which builds on the aspirations for developing Twickenham resulting from several consultation exercises. Shopping in the centre is to be consolidated and encouraged. A number of key sites are likely to be developed in the short term (the Station and adjacent Sorting Office site). Work is also underway to establish a Business Improvement District in the centre. The ballot is due to take place later this year. There are therefore many positives to take forward. Data suggest encouraging signs of improvement in terms of the health of the centre, although the picture for Twickenham is more mixed. As with Richmond continued monitoring is needed to assess whether major structural changes happening in the retail sector require changes to policy.

4: East Sheen town centre

Introduction

Regional context

The London Plan defines East Sheen as a district centre, as such its main purpose is to provide convenience goods and services to local communities. It is considered as a suitable location for "medium growth" (policy A2.6)[34], i.e. a "town centre(s) with moderate levels of demand for retail, leisure or office floorspace and with physical and public transport capacity to accommodate it."

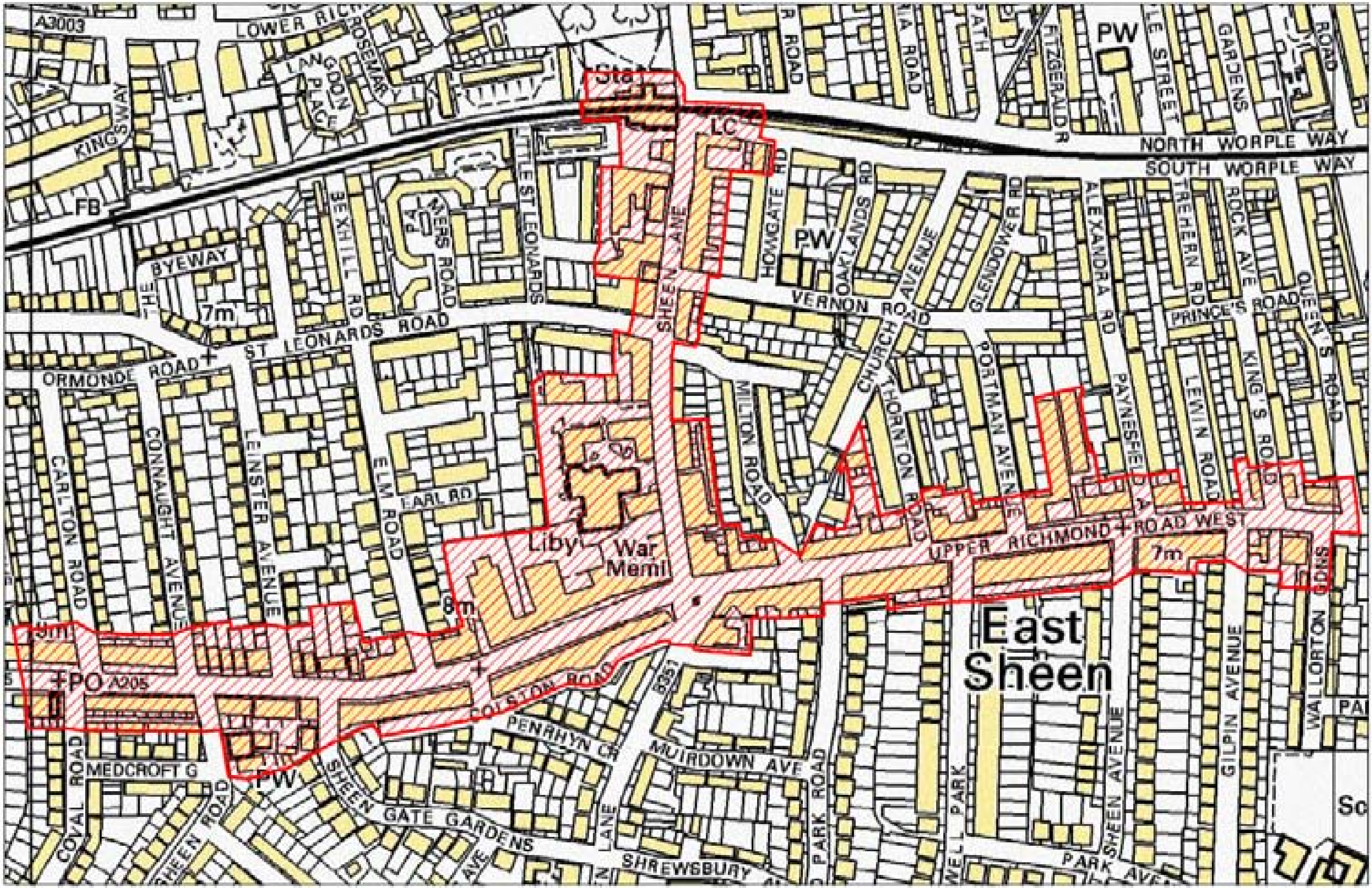
Village plan for East Sheen

The Council has produced a series of Village Plans following extensive consultation through an All-In-Survey. Please use the following link to access the following web pages.
http://www.richmond.gov.uk/east_sheen_area_village_plan.htm#c1

The vision set out in the Village Plan includes the following relating to town centres:
Between [Richmond Park and the River Thames] is a major district shopping centre with a mix of multiple and specialist shops, including a large Waitrose and a range of community facilities at the Sheen Lane Centre. The centre of East Sheen is bisected by the South Circular Road and inevitably this has a major impact on its appearance and character.
The aim is to maintain the local character and in particular the character of the housing and the distinctive tree lined streets, historic buildings and walls and to improve the convenience of the shopping centre to the community through reducing the impact of through traffic. The major opportunity will be with the redevelopment of the Stag brewery site, to improve the physical and visual links to the River Thames.

[34] However, it is acknowledged that such categorisations are indicative and refer to the broad potential for the whole centre and not individual sites.

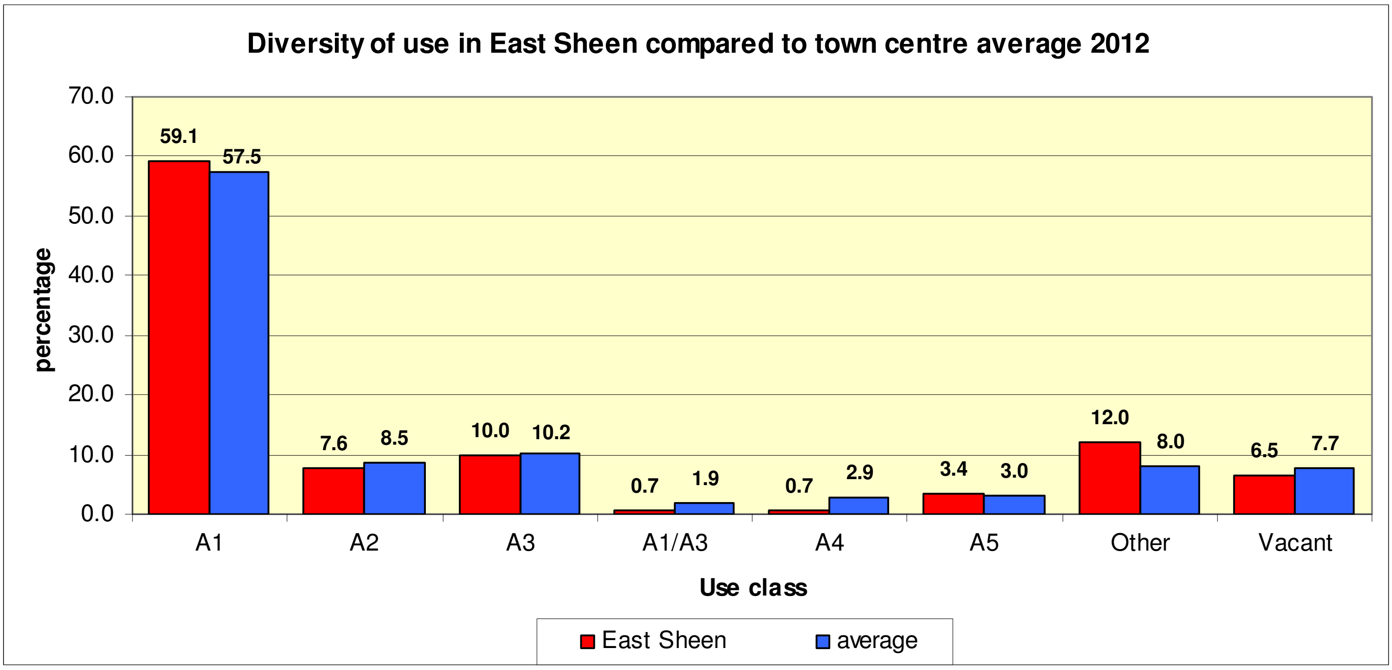
East Sheen Town Centre boundary



 1:3,650

4.1 Diversity of main town centre uses

4.1 a) Mix of uses: business activity



Source: LBRuT, Town Centre Land Use Survey 2012. See notes on methodology in Appendix 1, and for description of the Use Classes Order.

East Sheen has 172 shops (July 2012) and the highest proportion of retail as a percentage of total outlets of any of the district centres. The proportion of retail in designated key shopping frontages (where planning policies normally restrict change of use from shopping) is particularly high at 75%. The number of shops in East Sheen has fluctuated over the period set out in the table below. Although current numbers are less than the peak in 2004, they remain high and there has been a notable increase between 2011 and 2012. The overall level of retail floorspace has fallen over the period (see below for detail), although this can in part be explained by the redevelopment of the Waitrose site on the Upper Richmond Road West which incorporated the adjoining Safeway store and now has a separate unit selling comparison goods. It does not mean there has been a significant reduction in range.

It has diversified less than Twickenham and proportionally growth in the eating and drinking sector has been more in line with Whitton with 14% of business units in this category, below the town centre average (the 5 larger borough centres) of 18%.

However, the proportion of units classified as “other” which includes uses such as launderettes, car showrooms, as well as office and hotels etc at 12% is larger than the average for a larger borough centre (8.7%) which could reflect the relatively large proportion of non-designated frontage in the centre which allows for greater flexibility in the types of uses which are suitable if planning permission is sought.

Table 53: Diversity of uses in East Sheen town centre

Planning policy designation*1	Use Class	2000	2001	2002	2004	2006	2008	2010	2011	2012	2000	2001	2002	2004	2006	2008	2010	2011	2012	Town centre average 2012
		number of uses									percentages									
KEY	**A1**	55	52	55	57	52	53	53	52	57	72.4	68.4	72.4	76.0	67.5	69.7	69.7	68.4	75.0	69.3
	A2	12	12	12	10	11	11	10	11	11	15.8	15.8	15.8	13.3	14.3	14.5	13.2	14.5	14.5	7.6
	A3/A4/A5*2	8	7	6	6	9	8	7	6	6	10.5	9.2	7.9	8.0	11.7	10.5	9.2	7.9	7.9	13.4
	Other	0	0	0	0	1	0	0	0	0	0	0	0	0.0	1.3	0.0	0.0	0.0	0.0	2.4
	Vacant	1	5	3	2	4	4	6	7	2	1.3	6.6	3.9	2.7	5.2	5.3	7.9	9.2	2.6	6.5
	Total	**76**	**76**	**76**	**75**	**77**	**76**	**76**	**76**	**76**										
SECONDARY	**A1**	70	71	73	77	74	74	73	81	85	59.3	59.7	61.9	65.8	63.8	63.8	62.9	61.4	62.5	51.5
	A2	5	4	4	4	4	4	5	6	8	4.2	3.4	3.4	3.4	3.4	3.4	4.3	4.5	5.9	10.5
	A3/A4/A5	25	24	25	24	23	23	21	23	23	21.1	20.2	21.2	20.5	19.8	19.8	18.1	17.4	16.9	20.7
	Other	10	10	9	9	8	10	8	10	11	8.5	8.4	7.6	7.7	6.9	8.6	6.9	7.6	8.1	9.0
	Vacant	8	10	7	3	7	5	9	12	9	6.8	8.4	5.9	2.6	6	4.3	7.8	9.1	6.6	9.2
	Total	**118**	**119**	**118**	**117**	**116**	**116**	**116**	**132**	**136**										
NON-DESIGNATED	**A1**	44	46	47	46	47	42	38	29	30	48.4	50	51.1	50.0	46.5	42.9	39.2	36.7	38.0	33.7
	A2	2	2	2	3	3	5	4	3	3	2.2	2.2	2.2	3.3	3	5.1	4.1	3.8	3.8	6.7
	A3/A4/A5	17	15	18	**17**	**16**	16	18	14	14	18.7	16.3	19.6	18.5	15.8	16.3	18.6	17.7	17.7	26.4
	Other	22	23	23	22	28	26	24	24	24	24.2	25	25	23.9	27.7	26.5	24.7	30.4	30.4	23.8
	Vacant	6	6	2	4	7	9	13	9	8	6.6	6.5	2.2	4.3	6.9	9.2	13.4	11.4	10.1	8.3
	Total	**91**	**92**	**92**	**92**	**101**	**98**	**97**	**79**	**79**										
TOTAL FRONTAGE	**A1**	169	169	175	180	173	169	164	162	172	59.3	58.9	61.2	63.4	58.8	58.3	56.7	56.4	59.1	57.5
	A2	19	18	18	17	18	20	19	20	22	6.7	6.3	6.3	6.0	6.1	6.9	6.6	7.0	7.6	8.5
	A3/A4/A5	50	46	49	47	48	47	46	43	43	17.5	16	17.1	16.5	16.3	16.2	15.9	15.0	14.8	18.0
	Other	32	33	32	31	37	36	32	34	35	11.2	11.5	11.2	10.9	12.6	12.4	11.1	11.8	12.0	8.0
	Vacant	15	21	12	9	18	18	28	28	19	5.3	7.3	4.2	3.2	6.1	6.2	9.7	9.8	6.5	7.7
	Total	285	287	286	284	294	290	289	287	291										
TOTAL DESIGNATED FRONTAGE	A1	125	123	128	134	126	127	126	133	142	64.4	63.1	66	69.8	65.3	66.1	65.6	63.9	67.0	61.7
	A2	17	16	16	14	15	15	15	17	19	8.8	8.2	8.2	7.3	7.8	7.8	7.8	8.2	9.0	8.8
	A3/A4/A5	33	31	31	30	32	31	28	29	29	17	15.9	15.9	15.6	16.6	16.1	14.6	13.9	13.7	16.5
	Other	10	10	9	9	9	10	8	10	11	5.2	5.1	4.6	4.7	4.7	5.2	4.2	4.8	5.2	5.2
	Vacant	9	15	10	5	11	9	15	19	11	4.6	7.7	5.2	2.6	5.7	4.7	7.8	9.1	5.2	7.6
	Total	194	195	194	192	193	192	192	208	212										

source: LBRuT Main Town Centre Land Use Surveys undertaken in Summer. See Note 3 to Table 2 for details of Survey.
Notes: *1 – Calculations for the Land Use Survey uses shopping frontage designations from the adopted UDP until 2010 and thereafter DMDPD designations. However, in the case of East Sheen the designations have remained largely unchanged, with the exception of some additional secondary frontage designated on Sheen Lane.

4.1b: Comparing East Sheen town centre to the UK average

Table 54: Sectoral comparison with UK average (floorspace and outlets)

	2005				May-11				
	outlets		floorspace		outlets		floorspace		
	number	UK index	amount ft2	UK index	number	UK index	amount ft2	UK index	floorspace converted to m2
comparison retail (non-food shopping)	93	114	158,200	106	88	118	154,700	112	14370
convenience retail (food shopping including newsagents, shoe repairs, markets)	22	63	56,300	63	14	78	35,600	66	3310
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	35	129	47,300	185	38	127	50,700	189	4710
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	38	88	64,100	81	38	78	60,100	71	5580
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	24	96	33,000	98	22	90	29,900	95	2780
vacant	4	20	7,800	31	24	88	45,100	119	4190
total	216		366,700		224		376,100		34,900

Notes: Index of 100 = UK average, less than 100 indicates fewer multiples in terms of percentage than the average
Total may not sum due to rounding.

Experian GOAD data compare centres to a hypothetical average based on surveying a large number of centres across the UK. Whilst the comparison retail sector amounts to approximately 14,400m2 making it the second largest centre in the borough for non-food shopping, the convenience sector is under-represented in terms of both the number of outlets and the amount of floorspace. This is not doubt related to out-of-centre supermarkets nearby which serve residents in this area.

The leisure sector is generally under-represented. Much of its offer is restaurant-based (22,200ft2, just over 2,000m2), and to a lesser extent cafes (9,400 ft2 or 870m2) which are growing sectors.

East Sheen does however, have c.1,000m2 of take-away space which with the exception of Twickenham is more than in the other larger centres. The amount has fallen since 2005. See comparison table and graph in Richmond section (2.3).

Under-representation of sectors

We can compare an individual centre's composition (the types of businesses in the centre) with a hypothetical UK average centre. This is particularly useful if we wish to determine whether there are potential gaps in provision (under-representation) which could be targeted for inward investment should there be scope to do so.

Data are available for outlets and floorspace i.e. we can compare the numbers of businesses in centre in a particular centre to the UK average, and also the amount of floorspace in that sector. To get a full picture of where under-representation might indicate a gap in provision, we must consider both together, as for example there be fewer outlets in a sector than the UK average, but the floorspace is greater because the size of the outlet/s is relatively large.

Smaller centres will have a more limited role in terms of their role and function and thus fewer shops with a more limited variety

Table 55: Under-represented sectors in East Sheen

	sector
food retail	types of shops with no outlets in East Sheen:
	CTN, fishmongers, frozen foods, greengrocers, permanent market
	types of shops under-represented compared to UK average:
	bakers & confectioners score of 50 for outlets & 82 in terms of floorspace supermarkets (50). Supermarket provision is provided by Waitrose, which following its redevelopment incorporated the adjoining Safeway store. The out-of-centre Sainsburys store on Manor Road will also serve residents living in the area.
non-food	types of shops with no outlets in East Sheen:
	antiques, catalogue showrooms, cards, jewellery, ladies & menswear, music, video, office supplies, telephones, vehicle sale & repair
	types of shops under-represented compared to UK average:
	2 sectors are only slightly under-represented in terms of outlets: crafts, gifts etc (89) - however, in terms of outlets not considered under-represented, hardware & household (93 in terms of outlets and only 28 in terms of floorspace suggesting this type of retailer usually occupies a larger unit) Others less well-represented are: booksellers (84)(60 in terms of floorspace), clothing general (38), footwear (74), however score of 145 in terms of floorspace, ladies wear (75), menswear & accessories (51), toiletries & cosmetics etc- {not dispensing chemist which are well-provided} (49 for outlets, 91 for floorspace)
retail service	There may not be a great deal of scope for other businesses in the retail service sector as the centre is fairly well provided for. It does not have businesses providing TV/video or vehicle rental or a filling station. None of which are necessarily sectors where growth is expected, at least in a town centre position.
financial & business services	Although well-provided for in some sectors (building supplies and services, other business services, printing and copying & estate agents, East Sheen has fewer than average businesses in the legal and financial services sectors.
leisure	See earlier table for comparison with other centres. With the exception of restaurants, where there is good provision (outlets and floorspace) in terms of the number of outlets, East Sheen has fewer bars & wine bars, cafes, take aways and pubs than the UK average hypothetical centre. If the amount of floorspace is considered, pubs and wine bars are under-represented, and not the eating offer. Its hotel and sports provision is limited. It is a mainly restaurant based evening economy offer.

Source Experian GOAD Category Report. © copyright Experian GOAD.
Outlets will be categorised by the primary function of the business.
Data are for the immediate town centre as defined by Experian. They are the latest available. However, businesses will have opened and closed since surveyed.

Figure in brackets is the score comparing East Sheen to the UK hypothetical town centre, in terms of outlets (not floorspace). To get a full picture of where under-representation might indicate a gap in provision, the amount of floorspace in that sector must also be considered and where worthy of note is referred to in the text. A score below 100 indicates under-representation. The lower the score, the further from the average.

Since 2005 the number of food shops has fallen significantly from 22 to 14 in 2011, particularly noticeable in the CTN (confectionary, tobacco and news) sector. In 2005 the overall convenience score was 63, compared to 78 in 2012. Therefore despite the reduction in food shops, there has been improvement in this sector if compared to the UK average, suggesting that a national decline has taken place.

4.1 c) Multiple representation in East Sheen town centre

Multiple retailers are defined as those with 9 or more outlets/branches.

Table 56: Multiples in East Sheen (floorspace & outlets)

	Spring 2005				**May 2011**			
	outlets		Floorspace		**outlets**		**floorspace**	
	number	UK index	amount ft2	UK index	**number**	**UK index**	**amount ft2**	**UK index**
Total	48		130,400		52		118,800	
comparison retail (non-food shopping)	20	83	46,100	69	20	88	51,700	90
convenience retail (food shopping including newsagents, shoe repairs, markets)	5	92	34,500	134	4	71	22,900	88
retail services (including health & beauty, Pos, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	1	179	21,600	1,543	7	135	9,400	159
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	10	96	21,400	90	10	99	15,600	84
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	12	159	6,800	53	11	133	19,200	180
% operated by a multiple	22.2		35.6		23.2		31.6	
% of **retail sector**[*4] operated by a multiple	21.7		37.6		23.5		39.2	

© Experian GOAD. Source: Experian GOAD Category Reports

Notes: 1- A multiple has 9 or more outlets. All multiples included retail, retail service, leisure service & financial and business services

2 - Index of 100 = UK average, less than 100 indicates fewer multiples in terms of percentage than the average

*3 - Skewed by small number of outlets and by presence of multiples in chemist/beauty retail sales in large units.

*4 - comparison retail and convenience retail.

See Table 10 for borough comparison. According to Experian GOAD there are 52 multiple outlets in East Sheen, which amounts to 118,800 ft2 (c 18,000 m2) of floorspace. Whilst there has been a slight increase in number since 2005, the amount of floorspace has fallen.

In the food sector, some of this can be explained by in part by the Waitrose redevelopment as explained above. The amount of non-food retail floorspace has increased over the same period, although the number remains the same.

In 2012 23% of outlets were occupied by a multiple. The same proportion of retailers were multiples. This is the smallest proportion of all the district centres. Since East Sheen has more comparison shopping than the UK average, and the most comparison shopping floorspace than other district centres, this data suggests that it has a strong independent sector which may help to differentiate East Sheen from other shopping centres. East Sheen has with a growing and affluent population. It is anchored by a key multiple – Waitrose, and thus its strong independent sector could be regarded as a strength.

Charity shops

See Table 5 for borough comparison. With 10 charity shops in 2012, East Sheen has as many as Twickenham town centre. As a proportion of shops it is however relatively low compared to other similar centres in the borough, although charity shops are well-represented here compared to the UK average. This could reflect falling demand (and falling rental levels), and/ or that charities seek representation in more affluent areas.

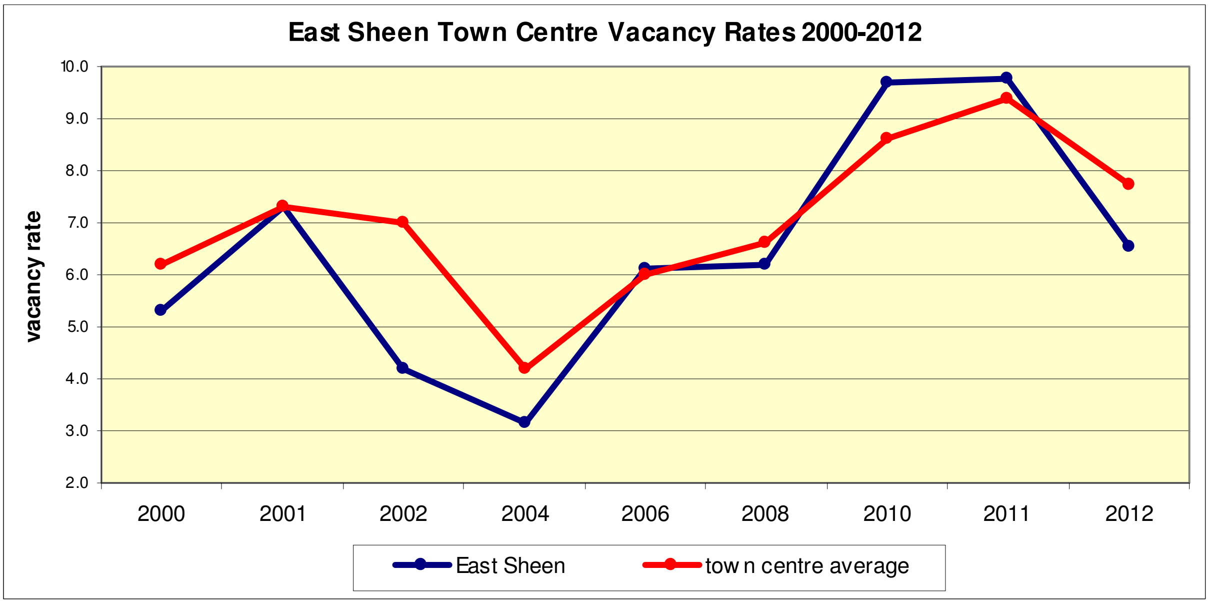
4.2 Vacancy rates

Long-term figures:

Table 57: Vacancy rates in East Sheen (all frontages)

	Vacant uses as percentage of all uses								
	2000	2001	2002	2004	2006	2008	2010	2011	2012
East Sheen	5.3	7.3	4.2	3.2	6.1	6.2	9.7	9.8	6.5

Source: LBRuT Town Centre Land Use Surveys. Produced by Planning Policy Section



Source: LBRuT Town Centre Land Use Surveys. Produced by Planning Policy Section

See Table 13 for borough comparison. As with the other centres, the long-term figures show a vacancy rate which has fluctuated considerably over the years, between 3% and reaching its peak in 2011 at just below 10%. The latest figure for 2012 is significantly lower at 6.5% and is approximately half the national average. Vacancy rates have been on or below the average for larger centres over the period shown, with the exception of 2010-11.

Long-term vacancies

In July 2012 there were only 5 units which were considered to be long-term vacants, i.e. had been vacant for 2 years or more. This is approximately a quarter of vacant units in East Sheen and only 1.7% of units in the centre as a whole, which is relatively insignificant. Of these, two were subject to planning applications for change of use at the time of survey. They consist of a mixture of uses including retail, builders yard, gallery and dry cleaners.

UK comparisons

Estimates produced by Experian GOAD & the Local Data Company suggest a UK vacancy rate of c.14%. Although the methodology and date of survey does not correspond exactly with the Council's more frequent surveys it indicates that vacancy rates in the centre are well below the national average. The latest GOAD Category Report (2011) suggests that vacancy levels (percentage of outlets) were then below the UK average (Index of 88, where the UK average is 100), even though vacancy levels were at that point higher than they are now.

In 2011 GOAD estimated that East Sheen had c.4,200m2 of vacant floorspace, more than any of the larger centres. Vacant floorspace as a proportion of all floorspace was slightly higher than the UK average. Although it is more usual to use the proportion of vacant outlets for comparison and worth bearing in mind that more a more recent Council survey shows a marked fall in vacant premises.

4.3 Comparing East Sheen with the national picture: benchmarking

The Colliers International Town Performance Matrix is a unique benchmarking analysis which compares historical town performance with forecast future performance for 364 towns and cities across Great Britain. The matrix uses a range of data and generates 'historic' and 'future' performance scores have been calculated for each location. See Richmond section 2.3 for details.

Each town can be classified as one of five performance categories. East Sheen is considered as **degenerating**. However, Colliers suggest that the centre is scores poorly by a small margin on a number of factors which when combined to produce the Matrix places the centre in this category. There will always be anomalies in a data-driven model such as this. However, factors identified as scoring less well include rental change, centre dominance (competition), populations living nearby, and numbers of retailers seeking representation.

Performance category	No of towns	Percentage of towns
Thriving	64	18%
Improving	71	20%
Stable	151	41%
Degenerating	38	10%
Failing	40	11%

Source: Colliers International, 2012 © Colliers International.

Centres at Risk and Venuescore

The Javelin Group published a paper[35] in April 2012 identifying a "threat level" in terms of remaining a successful centre, for more than 600 towns across Britain. East Sheen is identified as in the "most robust" category amongst smaller centres.

4.4 Businesses looking for space in the centre

Information on businesses specifically seeking representation in the town centre available to the Council is limited. It is thought that analysis of the mix of businesses in the centre and identifying under-representation may be a more useful indicator. Data provided for the calendar year of 2012 (nearly 5,700 for East Sheen, Mortlake & Barnes) suggests a similar level of demand as elsewhere in the borough with the exception of Richmond, and compares favourably with the statistics for other Outer London towns.

However, since there is a surprisingly even number of requests recorded for most areas across the borough it could be that those looking those seeking information are looking at a wide geographical area initially. Interpretation of results should be treated with caution.

4.5 Prime Retail Rents

Table 18 includes rental levels for East Sheen. Zone A rents (£ per ft2) are for East Sheen have remained fairly stable in the long term. Although in 2012 they dropped to £50/ft2, which is the lowest since figures became available in 2004.

[35] Javelin Group – Battlefield Britain: Survivors & Casualties in the fight for the High Street, April 2012

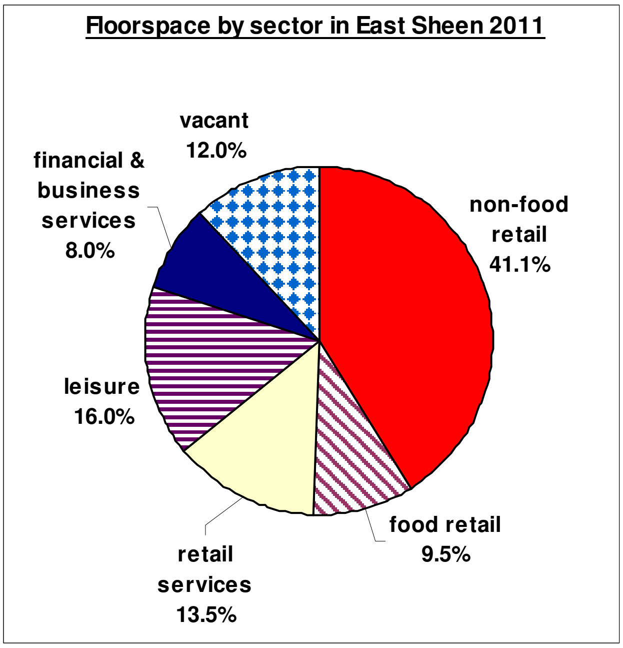
4.6 Floorspace

2011 Experian GOAD floorspace estimates by sector are included in Table 20. East Sheen has approximately 35,000m2 of floorspace in total. It is estimated that there is 14,400 m2 of comparison goods floorspace and 3,300m2 of convenience (food shopping) floorspace . This makes East Sheen the second largest centre in the borough (in terms of floorspace) for non-food shopping behind Richmond.

There are in fact more shops in East Sheen in 2012 than there were in 2000, albeit that the figure peaked in 2004 and is not back to those levels. However, the floorspace figures show an 11% drop in retail floorspace between 2005 and 2011 (Experian GOAD).

Closer inspection of the data reveals that reduction is primarily in supermarket floorspace. Since 2005 the Waitrose supermarket on the Upper Richmond Road West has been redeveloped incorporating the adjacent Safeway store. The redevelopment included a separate unit which is now occupied by a furniture retailer. Since East Sheen was surveyed in 2011 Tesco has increased its provision in the centre with the opening of an Express on Sheen Lane.

We might conclude that food shopping is increasingly being provided by the main supermarkets in various forms.



Source: Experian GOAD latest Category Report. © Experian GOAD.

4.7 Employment in town centres

Workforce data have not yet been released for the 2011 Census. According to the 2001 Census approximately 5,300 people make up the daytime population in this ward (East Sheen), which is more than other district centre in the borough. The daytime population comprises those who work in the area and those who live in the area and do not work. East Sheen's daytime population is relatively low which fits with the more even pedestrian flow recorded.

Table 58: Daytime populations in wards which bestfit with town centre boundaries.

Town centre (best fit with ward)	Number of people
Richmond	12,200
Twickenham	8,700
Teddington	8,300
East Sheen	5,300
Whitton	3,900
Barnes	5,000

Source 2001 Census. © Crown Copyright

4.8 Footfall: pedestrian flow

Pedestrian flows counts were undertaken at 10 monitoring sites across the centre in October 2012, updating counts undertaken in 1997, 2000 and 2006.10 minute counts were taken at each site which were then factored up to represent an estimated hourly rate. The map below shows the location of the sites and identifies the estimated count at the lunchtime peak. The Table on the following page presents the data in full.

Pedestrian flow is generally at its highest in East Sheen during the afternoon count (4-5pm). However, the morning count (10-11pm) tends to be higher than at lunchtime which probably relates to the centre being less of an employment centre than Twickenham and Richmond. Most of the smaller centres tend to have a more even pattern of footfall across the day with less distinct peaks.

As with most centres the highest footfall tends to centre on the main supermarket in the town, in this case Waitrose. It is clear from the table that this has consistently been the case in East Sheen over the 4 periods in question. The point located at the intersection of Sheen Lane and the Upper Richmond Road West has the next highest footfall. Conversely the lowest footfall has consistently been recorded at the monitoring point at the western edge of the town centre boundary.

Table 59: Estimated pedestrian flowcounts in East Sheen town centre 1997, 2000, 2006 & 2012

		2012				2006				2000				1997			
Premises Name	Address	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.
(1) Pizzagogo	378 Upper Richmond Road West	42	66	96	48	36	42	60	54	78	120	114	96				
(2) Leonardo's Wine Bar	1-2 Grand Parade	66	132	114	66	96	138	186	114	72	102	156	132	186	90	120	72
(3) Waitrose	Upper Richmond Road West	234	324	558	144	480	792	900	282	762	714	588	462	360	378	624	186
(4) Gascoigne Pees	254 Sheen Lane	378	432	474	168	144	342	246	96	252	246	150	24	258	534	288	150
(5) Esso Petrol station	Sheen Lane	144	228	270	162	210	198	162	408	84	138	132	54	264	162	132	60
(6) Taste of Raj	130 Upper Richmond Road West	156	48	102	138	132	114	156	36	156	102	144	120				
(7) Blockbuster Video	158 Upper Richmond Road West	120	126	162	108	144	78	138	96	126	96	132	168				
(8) Sheen Bed Company	215 Upper Richmond Road West	294	132	138	108	150	282	90	78	114	246	294	78				
(9) Lasyl hi-fi	220 Upper Richmond Road West	192	192	240	216	282	222	258	216	138	258	186	192	150	276	318	180
(10) HSBC Bank	357-359 Upper Richmond Road West	318	234	336	54	240	450	132	108	342	444	210	138	318	486	444	90

Source LBRuT Planning Policy Team. Survey day: Wednesday 19th September.

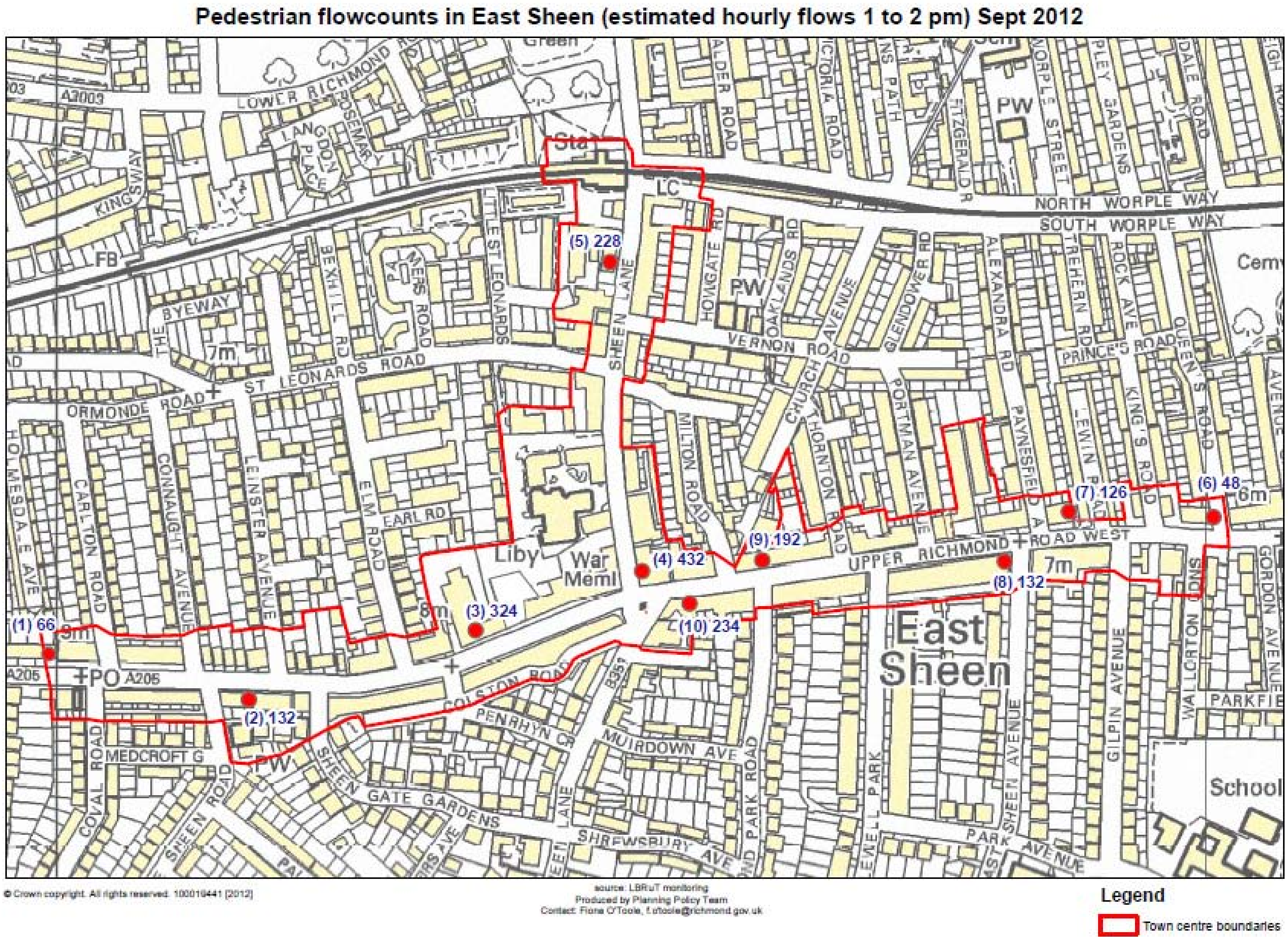
Weather conditions 2012: Mild and dry.

Notes - Figures are extrapolated from 10 minute counts.

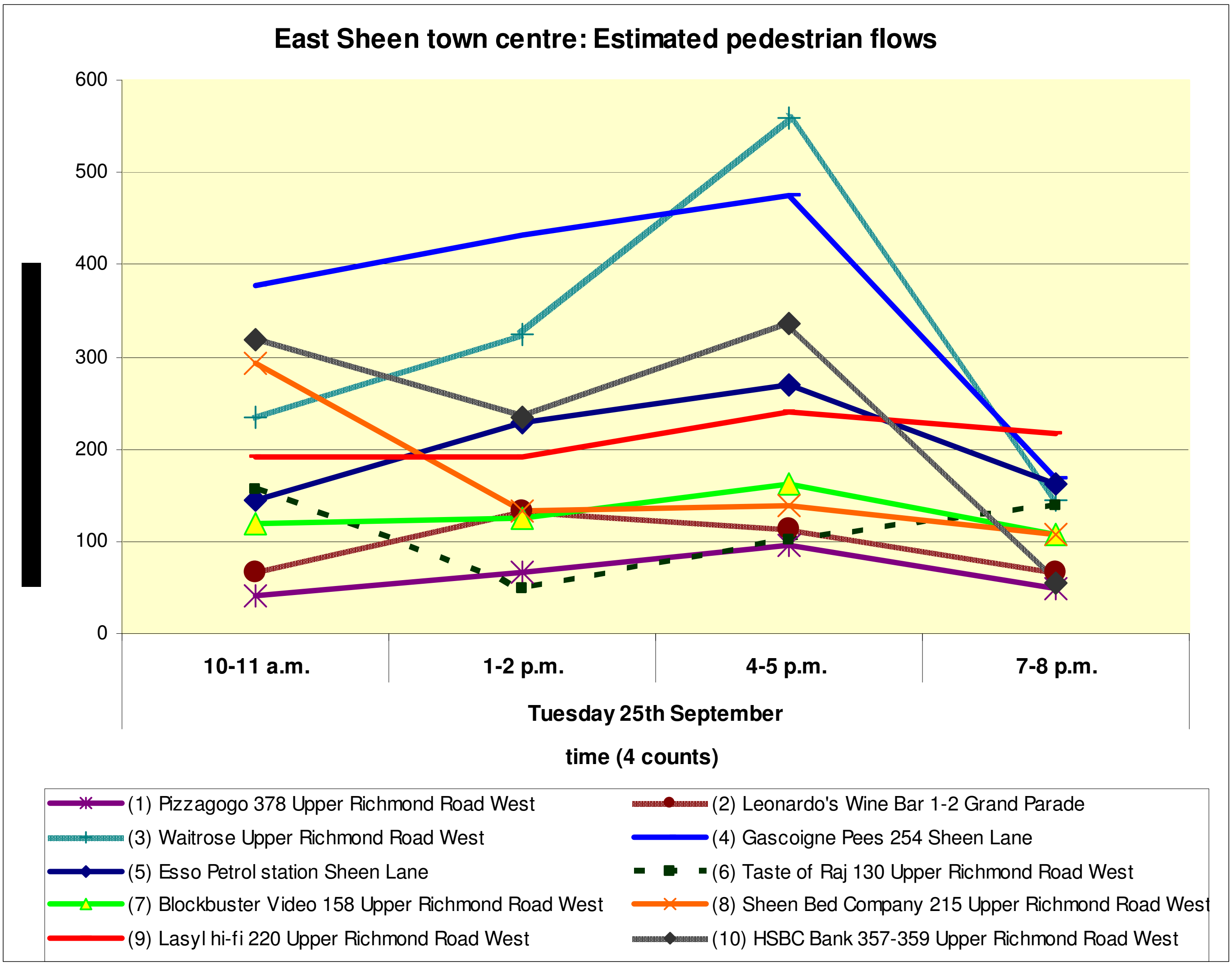
Red indicates the highest counts at each session, and blue the lowest.

Waitrose entrance relocated, and does not now face the Upper Richmond Road West (2012 counts).

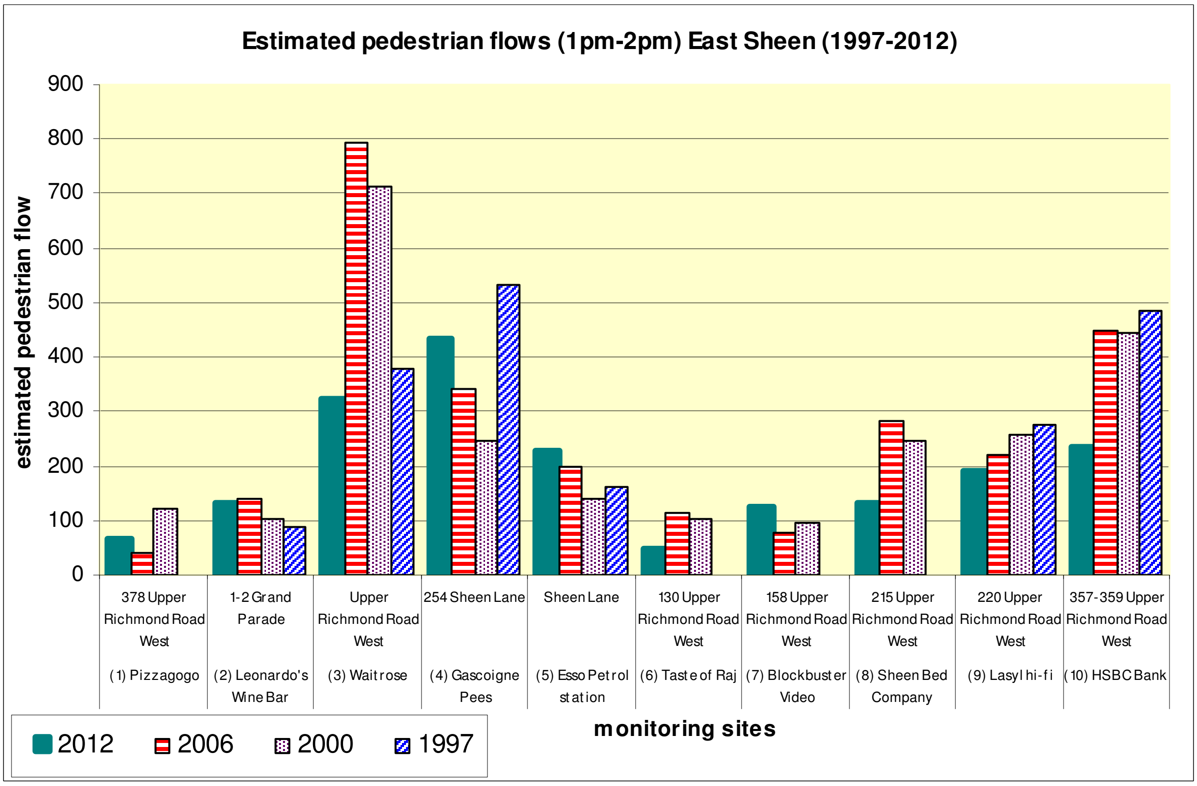
As a rough guide to assess changing patterns over the years, an average count for all the monitoring points was calculated and this indicates that footfall has fallen between 2000 and 2006 and again between 2006 and 2012. However, numbers were higher in 2012 than the first counts undertaken in 1997 (smaller number of sampling points). We should be cautious in interpreting this data since the counts are taken infrequently and can be subject to changes in weather etc.



Source: LBRUT Planning Policy Team



Source: LBRUT Planning Policy & Research



Source: LBRUT Planning Policy & Research

4.9 Accessibility & parking

Table 60: Bus Routes – East Sheen town centre

	number of buses per hour							**List of key centres passed through**
	Monday to Friday			Saturday		Sunday		
Service Number	Peak	Off peak	Eves	Day	Eves	Day	Eves	
33	7	7	4	7	6	7	4	Hammersmith, East Sheen, Richmond, Twickenham, Teddington
337	5	5	4	5	4	4	4	Putney, East Sheen, Richmond
419	4	4	2	4	2	2	2	Richmond, Hammersmith
493	5	5	3	5	3	3	3	Richmond, East Sheen, Roehampton, Wimbledon, Tooting,

Source: LBRUT Transport
Notes * = Buses on route 33 run more frequently between Richmond and Hammersmith at the times indicated

The 33 route is a 24 hour service and there are 8 trains/ hour.

Table 61: Train Routes – East Sheen town centre (Mortlake BR Station)

	Trains per hour
London Waterloo loop (via Kingston)	2
London Waterloo loop (via Hounslow)	2
Total number of trains arriving at Mortlake	***8***

Source LBRuT Transport

Table 62: East Sheen town centre car park capacity

Sheen Lane	Max stay 3 hours during operational hours	40 cars, 2 disabled
Waitrose	Customers only. Max stay restrictions	
Mortlake Station	Long stay available.	13 cars

Source: LBRUT Transport Section, and other

4.10 Customer and resident's views

The Council's All in One Consultation was undertaken in November 2010 and followed up with a series of local events. The full results for this area can be viewed on the Council's website using the following link: http://www.richmond.gov.uk/e_sheena4_web_.pdf.

Key results are:

The things that were most important in making it a good place to live included:

- 78% - Local parks and open spaces
- 42% - Level of crime and anti-social behaviour
- 39% - Public transport
- 33% - Shopping in your local high street
- 21% - Education and schools
- 20% - Library services

The things that most needed improving in your area included:

- 46% - Traffic and/or levels of congestion
- 25% - Provision of parking

- 23% - Condition of pavements
- 20% - Amount of litter and/or cleanliness of streets
- 20% - Affordability of local housing

There were 979 responses in this area.

4.11 Anti-social behaviour and perception of safety and occurrence of crime

(b)Anti Social Behaviour (ASB) levels

Data on Anti Social Behaviour levels reported to the Council for the period 2011-12 are available for the main town centre wards. ASB is gathered every month from three council databases which makes amalgamating data more difficult. The data provided covers 80% of the ASB total for the year.

Key facts for the borough as a whole are presented in the relevant section for Richmond town centre. Much of the reporting relates to littering, and usually occurs after 8pm on weekends. ASB reporting is based on perception and is therefore subjective. Most reports are concerned with "Environmental ASB", relating to a physical location rather than a person. Reports concerning the later are usually addressed directly to the police. "Environmental ASB" includes littering and fly tipping. However one-fifth of calls related to Noise, which is nine times out of ten an issue with human interaction and tolerance levels.

Of the three main ASB categories[36], barely 1% of council ASB calls/reports fall under the most serious category Level One (Personal). Around 14% of calls fall under Level Two (Nuisance) and 85% of calls/reports fall under the least serious category Level Three (Environmental).
Key facts for the borough as a whole are presented in the relevant section for Richmond town centre, although much of the reporting relates to littering, and usually occurs after 8pm on weekends.

Table 63: ASB Reporting 2011/12

Centre	Number of ASB reports in centre	Environs*1	% ASB taking place in centre	ASB Level
Barnes	42	182	22%	Low
Whitton	42	137	31%	Low
East Sheen	127	288	44%	Medium
Teddington	62	240	26%	Low
Twickenham	219	390	59%	Medium-High
Richmond	276	471	59%	Medium-High

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Notes *1 = covers the area around the main town centres, which is not the entire ward, as defined by the Community Safety Data Analyst

East Sheen had the third highest number of ASB reports in the last financial year, significantly lower than Twickenham and Richmond which have well-developed evening economies, but noticeably higher than the other district centres. 44% is taking place in the centre itself compared to the surrounding areas. It is less clear whether there is a strong link between the evening economy in East Sheen and ASB, although it will no doubt be a contributory factor. It could be linked to the level of take-aways in the centre.

All levels of ASB reported to the Council are quoted are relative to the borough and not pan-London. If these town centres were compared to local town centres such as Kingston, Hounslow or Hammersmith, they would all be classified as Low.

[36] Personal : 'Personal' is designed to identify ASB incidents that the caller, call-handler or anyone else perceives as either deliberately targeted at an individual or group or having an impact on an individual or group rather than the community at large.
Nuisance: 'Nuisance' captures those incidents where an act, condition, thing or person causes trouble, annoyance, inconvenience, offence or suffering to the local community in general rather than to individual victims
Environmental: 'Environmental' deals with the interface between people and places. It includes incidents where individuals and groups have an impact on their surroundings including natural, built and social environments.

Map of ASB calls/ incidents in East Sheen town centre area 2011/12

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Notes

1. These maps are a pictorial illustration and do not show all the ASB recorded in the total figure. Ward level identification has been used when mapping co-ordinates are not available. The green circle indicates the ASB hotspot.

Key findings:

- There were 127 reports of ASB in East Sheen town centre during 2011-12, which is an average of 11 calls/reports per month.
- The main type of ASB reported was Litter. The green circle designates the ASB “hotspot” at the junction of Upper Richmond Road West and Sheen Lane although levels are high elsewhere on the main street. Litter reporting numbers on the Upper Richmond Road have always been very high.
- As the town centre straddles the border of two wards it is difficult to get an accurate figure of how E Sheen town centre contributes to all ASB in E Sheen. There were 288 ASB reports in surrounding area during 2011-12, therefore the town centre contributed an estimated 44% of ASB.
- While the proportion of ASB is high, the vast majority of these reports are litter on a very busy long road (Upper Richmond Road). Therefore it is considered that this area is a “Medium” Environmental ASB level in the area.

Crime levels

Data are not released for East Sheen as crime levels are too low.

4.12 State of the town centre: environmental quality

East Sheen town centre has no Public Open Spaces or other spaces designated for their local value/importance; approximately half of the town centre is within an Area poorly provided with Public Open Space. However, there is access to open space nearby, notably Richmond Park and Mortlake Green. Some parts of the town centre fall within designated Conservation Areas, and there are also some historic assets (3 listed buildings and 109 Buildings of Townscape Merit). Four air quality analysers measure the air quality in the town centre, whereby three of them recorded levels that exceeded the air quality objective.

The environmental quality of East Sheen town centre has been assessed by dividing the centre into five areas: (1) Western part of Upper Richmond Road West, (2) Upper Richmond Road West core retail area, including Waitrose, (3) Sheen Lane and Mortlake Station approach, (4) Upper Richmond Road West (east of Sheen Lane), Sheengate Mansions, and (5) East Sheen – Mortlake Station and surroundings. See Appendix 4 for a map of the areas that have been surveyed.

In general, **Upper Richmond Road West (Areas 1, 2 and 4)** is a very busy road (TfL Red Route), and thus the centre is very impacted by traffic with lots of traffic-related noise, including noise from aircrafts. The core retail area (Area 2) has a very busy junction, providing extended waiting times for pedestrians to cross the road. However, given the constrained nature of the main road, there are many street trees (including some newly planted trees), some landscaped front gardens (particularly in Area 1) and hanging baskets, thus making the area quite pleasant. In general, the main road has been newly resurfaced within and to the west of the core retail area; the eastern part of Upper Richmond Road West is somewhat patchy and in need of repair. The pavements are of sufficient width for pedestrians and the buildings are generally of good design (there are only very few empty properties that may have an impact on the aesthetics of the area). There are only some very minor litter issues and fly-posting as well as fly-tipping has only been recorded as isolated incidents in the western part (Area 1).[This contradicts the more extensive data reporting in the ASB section above.] The street furniture has been upgraded (e.g. new benches) along the main road in the core retail area and to the west of it; in comparison, the eastern part of the road has poorer quality and less street furniture. There are planned improvements to Milestone Green (the public space by the war memorial), which has currently some outdated street furniture and paving. In general, the area along the main road does not feel cluttered, although there are some minor issues in relation to boards, signs, mobile access ramps to shops etc. Overall, Upper Richmond Road West, albeit very impacted by traffic, has a welcoming and pleasant environment.

Sheen Lane and the approach to Mortlake Station (Area 3) is less impacted by traffic in comparison to the main road, but is somewhat congested due to level-crossing downtimes at the station. This area provides a mixed picture in terms of vegetation/landscaping and paving; Sheen Lane Centre benefits from good provision of quality landscaping, including good paving and good quality street furniture, whereby along Sheen Lane the condition of the paving/surfacing is poorer and the vegetation is less, although there are still some mature trees along the road. There were generally no issues relating to fly-posting/graffiti and fly-tipping, and only some minor litter problems in the rear car park and some clutter along the road. Overall, the area is of good environmental quality, whereby the area along the road feels slightly unpleasant in comparison to the area by Sheen Lane Centre, which has very good public realm quality.

Mortlake station and its surroundings (Area 5) are heavily affected by the level-crossing downtime, which has knock-on impacts on the traffic along Sheen Lane, making the area feel very congested. Issues in relation to parking including insufficient parking spaces were also recorded. The roads and pavements are very patchy and there are lots of uneven surfaces, thus impacting on the public realm quality of the area. There is hardly any vegetation or soft landscaping; despite the constrained area, there is considered to be scope for some planting. Issues in relation to litter and street clutter were very minor, and no fly-posting/graffiti or fly-tipping has been recorded. The area is heavily affected by noise from trains, traffic (including stationary traffic) as well as aircraft. Overall, this area has in comparison to the other parts of the town centre the poorest environmental quality.

See Appendix 3 for the detailed results of the desk-based assessment, including analysis of open spaces, historic assets, air quality etc.

The individual survey sheets for the areas assessed can be found in Appendix 5.

4.13 Implementation of proposal sites

Table 64: Implementation of UDP Proposal Sites in East Sheen town centre boundary

Proposal site		Description	Progress in 2007/08	Progress in 2008/09	Progress in 2009/10	Progress in 2010/11	Progress in 2011/12
S7	North Sheen Station	interchange improvements	not implemented	not implemented	not implemented	implemented	implemented

Source: Extract from Appendix of Annual Monitoring Report 2011/12

North Sheen station which has been implemented, is the only proposal site saved from the UDP, and is thus part of the development plan which falls within East Sheen's town centre boundary.

4.14 Completions and commitments

Table 65 Use Class (shop) completions in East Sheen town centre boundary 1/10/2007 to 1/4/2012

			New completed floorspace 1*			**Net additional floorspace 2* (taking account of losses)**		
application ref	address	summary of proposal	new completed floorspace (m2) (gross external)	new gross internal floorspace m2 3* (gross internal)	of which net tradable floorspace m2 4* (gross internal)	net additional floorspace (gross external)	net additional floorspace (gross internal)	of which net tradable floorspace
07/1518/COU	75 Sheen Lane	Change of use from offices to retail on basement and part ground floor. Two residential units on first and second floor and retention of part ground floor rear as small business unit.	93	89.5	**71.6**			
10/2520/COU	360 Upper Richmond Road West	Reversal of use from SUI Generis to general A1 (retail) use class. No building works proposed.	72	69.3	**66.0**	72	69.3	66.0
08/3396	154 Upper Richmond Road West	Use of ground floor as Class D1 (Dental Practice).				-90	-86.6	**-69.3**
04/0010/FUL	129 Sheen Lane	Three storey rear extension	80	80		-40	-38.5	
07/3434/FUL	129 Sheen Lane	Proposed change of rear stock room into studio flat (This is a further reduction in space.)				-38	-36.6	**-29.3**
07/339/COU	210 Upper Richmond Road West	Erection of single storey extension and change of use.	40	40		-21	20.21	
08/0008/FUL	284 To 292 Upper Richmond Road West, East Sheen (Waitrose & additional unit)	Demolition of part of existing food retail store (Safeway), and formation of smaller retail unit facing Upper Richmond Road West …	260	250.3	**200.2**	260	250.3	**87.0**
08/1066/COU	39-41 Sheen Lane (Tesco Express)	Change of use of part of ground floor premises from B1 (office) to A1 (shop) and alterations to rear of the building.	367	353.2	**282.6**	367	353.2	**282.6**
08/1524/FUL	274A-276B Upper Richmond Road West	Ground level rear extension to provide additional retail floor space. Relocation of steel access stair. New rear access doors. Provision of freeholder's cupboard for electrical and other services.	31	29.8	**23.9**	31	29.8	**23.9**
09/2528/FUL	304 Upper Richmond Road West	Conversion of building to form four self-contained flats and alterations to existing shop unit.				-22	-21.2	-4
10/3229/FUL	335 Upper Richmond Road West	Alterations and extension to existing residential unit ….proposed single storey rear extension to enlarge commercial unit.	29	27.9	27.9	29	27.9	27.9
09/3119/COU	485 Upper Richmond Road West	Change of use of ground floor rear shop to residential.				-19	-18.3	0.0
		TOTAL	**972**	**940.1**	**672.2**	**529.0**	**549.6**	**384.8**
		TOTAL taking into account 07/3434	934	903.5	642.9			

Source : LBRuT Decisions Analysis system. Produced by Planning Policy Section.

Notes:

1* - New floorspace completions plus gains from change of use and conversions
2* - Net additional floorspace - takes account of losses and gains
3* Difference between gross external and gross internal floorspace defined by DCLG as 3.75%
4* Net tradable floorspace is the amount of gross internal floorspace which is trading floorspace i.e. sales space which customers have access to. Where retail sales area of either the existing or proposed development, or both is not known a proxy is calculated using a 80/20 ratio **(identified in bold)**

East Sheen is one of few centres, where there has been a noticeable increase in both gross retail floorspace and retail sales area. This is primarily down to two completions: the redevelopment of the Waitrose supermarket and the opening of a Tesco Express on Sheen Lane (the second in the centre) which was formerly a B1 office. However, there is little retail development in the pipeline.

Commitments

Table 66: Commitments in pipeline (additional retail) in East Sheen town centre (outstanding at Apr 2012)

				Additional retail in pipeline		
application ref	decision date	address	Proposal	approx retail sales area m2	Ancillary retail m2	total m2
11/2628/FUL	23-Mar-12	28 Sheen Lane East Sheen London	External alterations and change of use of vacant commercial premises to three self-contained flats at part ground, first and second floors and a Class A1 retail shop at ground level.	39	5	44
12/1325/COU	27-Jul-12	Ground Floor 46 Sheen Lane East Sheen London SW14 8LP	Ground floor change of use from office (Class B1) to general retail or financial and professional services (Class A1/A2) and insertion of new doorway to rear elevation.	33	13	46
			TOTAL	**72**	**18**	**90**

Source: LBRuT Decisions Analysis system. Produced by Planning Policy Section **.**
Notes: Table includes additional space only, not where there is a reduction in retail space.

Table 67: Commitments in pipeline (additional retail) of interest (outstanding at Apr 2012)

				Additional retail in pipeline		
application ref	decision date	address	Proposal	approx retail sales area m2	Ancillary retail m2	total m2
12/1225/FUL	14-Jun-12	86 Manor Road Richmond TW9 1YB (Currys/ pc world)	Installation of internal mezzanine for retail sales, and external alterations.	194	59	253
11/2562/VRC	30/03/2012	Sainsburys, 361 Lower Mortlake Road	Application to vary conditions U39908 and U40036 of planning permission 10/3085/FUL to allow an increased sales area within the existing store (as extended).	1100		1100
			TOTAL	1294	59	1353

Source: LBRuT Decisions Analysis system. Produced by Planning Policy Section **.**
Notes: Table includes additional space only, not where there is a reduction in retail space.
* although technically this is a reduction in retail floorspace as the proposal is mixed use, the Café Matthiae site has been vacant for many years. Tesco have brought this into use. **Open Nov 2012**

The above table includes present permissions of interest to this analysis. There are two modest permitted extensions to out of centre stores.

4.15 Potential for growth & change

The Council commissioned consultants GVA Grimley to produce a retail capacity study forming part of the evidence base for the LDF. Details of this study are presented in section 2.15, with estimates in Table 34.

- The **qualitative assessment** for East Sheen recognised the Safeway site key development opportunity, which has now been developed. The entertainment sector is less well-developed than Richmond & Twickenham. There was a niche in the furniture, soft furnishings & DIY sector. Retailer demand was high and vacancy rates well below national average. Clearly this assessment this assessment is updated by this and other previous research.

Capacity projections 2006 & 2009
The revised assessment (2009) suggests a pattern which is broadly the same as the earlier assessment. See Table 34 for capacity forecasts for all town centres. For East Sheen town centre the revised forecasts suggest **capacity for 1,110 m2 net for convenience (food) floorspace by 2016, rising marginally to 1,311m2 net by 2021**[37]. After this point (2026) capacity arises again to 1,535m2 net, although such long range forecasts should be treated with caution. For **comparison goods** East Sheen has a much lower **estimated capacity of 148m^2 in 2016 rising to 542m2 net**[38] **by 2021,** and almost doubling to 1,014m2 net by 2026.

[37] Residual expenditure is converted to floorspace using a sales density of £10,000 per m2, a minimum level required by most major food retailers.
[38] Assuming new comparison floorspace achieves a sales density of c. £5,000m2 net.

The net figures can be translated into gross town centre floorspace (including non-sales areas) by applying an appropriate gross to net ratio (65%). The gross figure also includes a further 15% for A3, A4 and A5 uses in the scheme, making a total ratio of c 80/20[39]. **Gross comparison capacity is also forecast as 267 m^2 by 2016 and 981 m^2 by 2021**. Overall, therefore this research suggests a **quantitative need to provide retail floorspace in the town centre which translates as an indicative requirement of 1,500m2 net by 2017/18 in the adopted Core Strategy (para 6.1.14)[40].**

The Study concludes that in general, proposals coming forward should be directed to the borough's town centres in the first instance. The scale of such development should be considered, as should the implications for existing floorspace and the potential to clawback money leaking from the catchment area. Since a proportion of the capacity arises from out of centre development, and bearing in mind that town centre sites should be considered first, there is potential to support more floorspace than identified in the analysis. It goes on to say that the Council should be proactive in planning for the borough's town centres bearing in mind the potential threat from Westfield shopping centre.

Scope for development

As part of the Study a number of sites were assessed in each town centre on the basis of an initial appraisal only and future viability testing was anticipated. The selection was not necessarily exhaustive & site boundaries only indicative.

Recommendations:

- vacant Safeway – site now redeveloped.
- site adjacent Mortlake BR station – would require detailed analysis, site is disjointed in terms of land ownership. Could accommodate mixed use development including small scale retail.

4.16 Town centre management & economic development

East Sheen Traders Association (ESBRA) works closely with the community dealing with local issues such as parking and funding new and exciting projects. It has over 130 members including retailers, businesses, estate agents and home workers.

Summary

East Sheen has more non-food shopping floorspace than the other district centres and the UK average, and is a sector which appears to be growing. Its food shopping offer is under-represented compared to the UK average, and there is less floorspace in this sector than in 2005. The redevelopment of the Waitrose supermarket is a benefit to the centre which has more recently been of interest to Tesco who have opened two smaller format stores. Out-of-centre provision will also serve residents living in this area. The proportion of units which are shops is slightly higher than the average for the larger centres in the borough and although actual numbers of shops have fluctuated over the last decade or so they are currently high and have seen a noticeable increase recently (between 2011 & 2012 land use surveys). We might conclude that food shopping is increasingly being provided for by the main supermarkets and that non-food shopping is potentially a growing sector. Overall, the centre has fewer multiple retailers than other similar centres. The data suggest a strong independent comparison retailer offer which helps to differentiate East Sheen from its competition.

East Sheen has approximately 35,000m2 of floorspace in total. It has a less-well developed food & drink offer than some of the other districts, which is mainly restaurant based, and to a lesser extent café-based, both growing sectors. It also a strong take-away sector of 1,000m2 floorspace, the amount having fallen between 2004 and 2011.

Positive signs include the increase in the number of shops in the centre, and the fall in vacancy rates to approximately half the national level. Both this indicators show recent "improvement", and it is too soon to conclude that a long-term trend will develop. Albeit that vacancy rates in East Sheen have mostly been below the borough town centre average. In terms of the quality of the public realm, the centre is clearly affected by traffic and this is unlikely to change, but there is access to open space which is valued by the residents and some environmental improvements in the centre are planned. Actual crime is low, and anti-social behaviour reporting is primarily concerned with litter.

Some signs are less positive, prime rents have declined slightly between 2011 and 2012 and are noticeably below Twickenham's, footfall is lower than previously recorded, although more frequent monitoring would be needed to confirm this as a real trend. Whereas the Javelin Group put the centre in the "most robust" category to withstand recession, Colliers International consider the centre to be "degenerating".

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[39] It does not include leisure floorspace

[40] Subject to testing of site availability at Site Allocations stage

Town centre indicators suggest a mixed picture for East Sheen with perhaps some degree of vulnerability. Very recent data on growing shop numbers and falling vacancy rates are positive. East Sheen's role as a comparison goods shopping centre is clearly an important one and the fact that this is a growing sector is also positive. It is expected that most of the retail capacity will arise in the east of the borough due largely to population growth which could help to sustain the centre.

5: Teddington town centre

Introduction

Regional context

The London Plan defines Teddington as a district centre, as such its main purpose is to provide convenience goods and services to local communities. It is considered as a suitable location for "medium growth" (policy A2.6)[41], i.e. a "town centre(s) with moderate levels of demand for retail, leisure or office floorspace and with physical and public transport capacity to accommodate it."

Village plan for Teddington

The Council has produced a series of Village Plans following extensive consultation through an All-In-Survey. Please use the following link to access the following web pages.
http://www.richmond.gov.uk/teddington_area_village_plan.htm

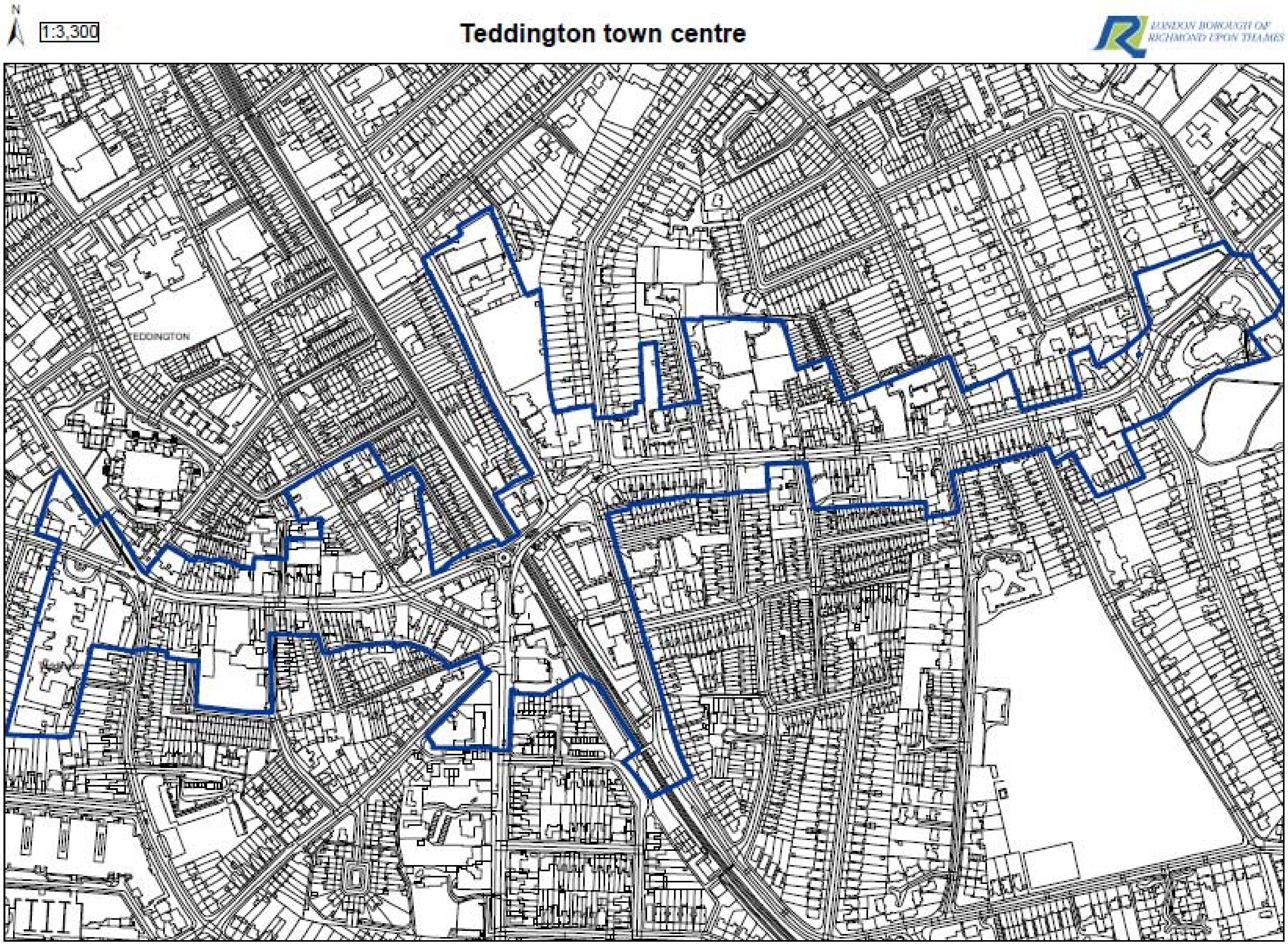
The vision set out in the Village Plan includes the following relating to town centres:

The vision for Teddington is that it will continue to be a thriving district centre with a wide range of shops, employment, and leisure, cultural and social facilities to meet the needs of the local community. There is the opportunity to improve the public realm in the Causeway and Broad Street.

The attractive built environment, extensive open areas and riverside will continue to be protected, enhanced and enjoyed by residents.

The impacts of through-traffic will be reduced and parking managed to ensure that residents can access their centre and enjoy the amenities of the area and its surroundings.

[41] However, it is acknowledged that such categorisations are indicative and refer to the broad potential for the whole centre and not individual sites.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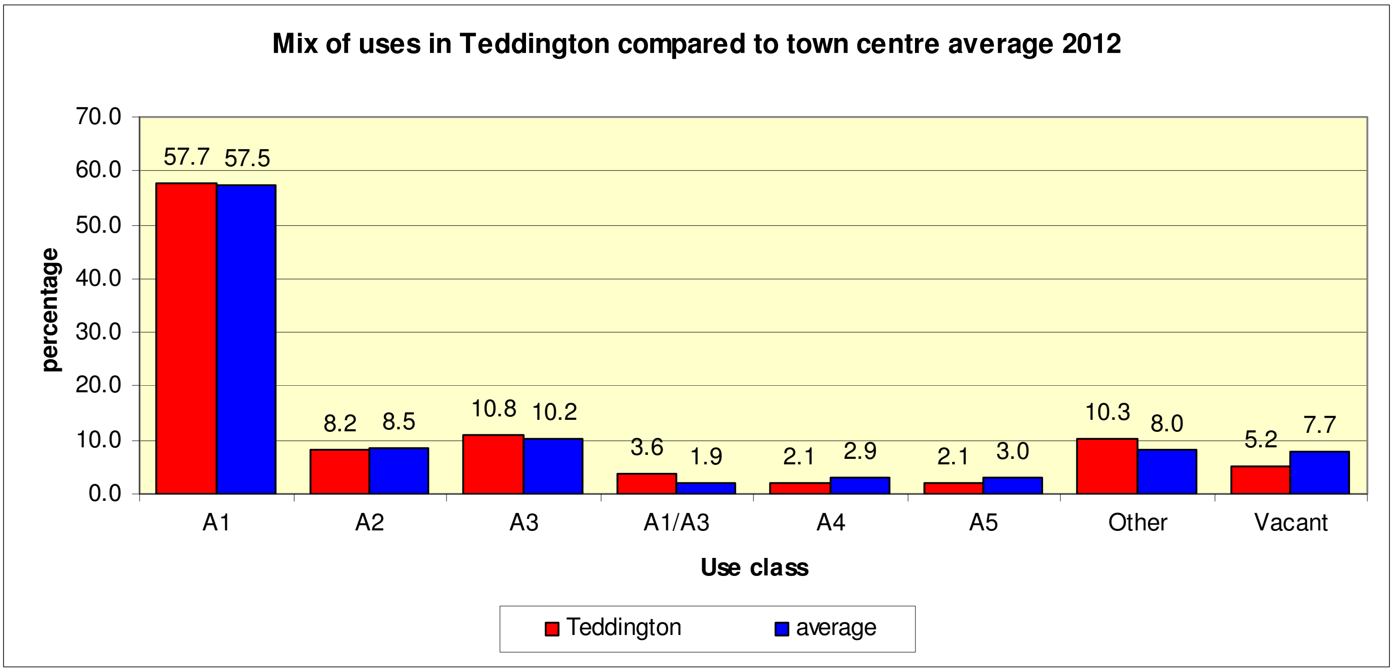
Teddington town centre
LONDON BOROUGH OF RICHMOND UPON THAMES
TEDDINGTON

5.1 Diversity of main town centre uses

5.1 a) Mix of uses: business activity



Teddington's mix of uses is very similar to the average for the five larger centres in the borough. Perhaps with the exception of a lower vacancy rate than the norm. The table provided below shows a more detailed breakdown over the past decade or so. A key indicator of change in the centre is to look at how the number of shops has fluctuated. There are 112 shops in the centre (2012), and this figure has remained stable over the latest 5 years. This figure has been slightly higher historically. The number of shops in designated frontages, where planning policy protects an appropriate level of shops, remains high.

Please note that changes to designations in the centre should be borne in mind when considering the table as the fall in the number of shops in secondary frontage is reflected in the commensurate rise in key shopping frontage.

Table 68: Diversity of uses in Teddington town centre

Planning policy designation*1	Use Class	2000	2001	2002	2004	2006	2008	2010	2011	2012	2000	2001	2002	2004	2006	2008	2010	2011	2012	Town centre average 2012
		number of uses									percentages									
KEY	**A1**	67	64	58	65	65	62	60	79	80	74.4	71.1	64.4	73.9	73.9	70.5	68.2	68.1	69.0	69.3
	A2	7	7	7	7	7	7	7	10	9	7.8	7.8	7.8	8.0	8.0	8.0	8.0	8.6	7.8	7.6
	A3/A4/A5*2	11	11	11	13	11	13	13	19	19	12.2	12.2	12.2	14.8	12.5	14.8	14.8	16.4	16.4	13.4
	Other	2	2	2	0	0	2	2	6	5	2.2	2.2	2.2	0.0	0.0	2.3	2.3	5.2	4.3	2.4
	Vacant	3	6	12	3	5	4	6	2	3	3.3	6.7	13.3	3.4	5.7	4.5	6.8	1.7	2.6	6.5
	Total	90	90	90	88	88	88	88	116	116										
SECONDARY	**A1**	42	41	43	43	42	42	41	28	27	53.8	52.6	54.4	55.1	54.5	55.3	53.2	45.2	45.0	51.5
	A2	6	9	9	9	8	7	7	7	6	7.7	11.5	11.4	11.5	10.4	9.2	9.1	11.3	10.0	10.5
	A3/A4/A5	15	14	15	15	15	16	15	11	11	19.2	17.9	19.0	19.2	19.5	21.1	19.5	17.7	18.3	20.7
	Other	8	8	9	8	7	8	9	10	10	10.3	10.3	11.4	10.3	9.1	10.5	11.7	16.1	16.7	9.0
	Vacant	7	6	3	3	5	3	5	6	6	9.0	7.7	3.8	3.8	6.5	3.9	6.5	9.7	10.0	9.2
	Total	78	78	79	78	77	76	77	62	60										
NON-DESIGNATED	**A1**	10	10	9	10	8	8	10	5	5	33.3	34.5	31.0	34.5	26.7	28.6	37.0	29.4	27.8	33.7
	A2	5	4	4	4	3	5	4	1	1	16.7	13.8	13.8	13.8	10.0	17.9	14.8	5.9	5.6	6.7
	A3/A4/A5	5	5	5	6	5	7	5	6	6	16.7	17.2	17.2	20.7	16.7	25.0	18.5	35.3	33.3	26.4
	Other	6	5	7	8	8	7	6	5	5	20.0	17.2	24.1	27.6	26.7	25.0	22.2	29.4	27.8	23.8
	Vacant	4	5	4	1	6	1	2	0	1	13.3	17.2	13.8	3.4	20.0	3.6	7.4	0.0	5.6	8.3
	Total	30	29	29	29	30	28	27	17	18										
TOTAL FRONTAGE	**A1**	119	115	110	118	115	112	111	112	112	60.1	58.4	55.6	60.5	59.0	58.3	57.8	57.4	57.7	57.5
	A2	18	20	20	20	18	19	18	18	16	9.1	10.2	10.1	10.3	9.2	9.9	9.4	9.2	8.2	8.5
	A3/A4/A5	31	30	31	34	31	36	33	36	36	15.7	15.2	15.7	17.4	15.9	18.8	17.2	18.5	18.6	18.0
	Other	16	15	18	16	15	17	17	21	20	8.1	7.6	9.1	8.2	7.7	8.9	8.9	10.8	10.3	8.0
	Vacant	14	17	19	7	16	8	13	8	10	7.1	8.6	9.6	3.6	8.2	4.2	6.8	4.1	5.2	7.7
	Total	198	197	198	195	195	192	192	195	194										
TOTAL DESIGNATED FRONTAGE	A1	109	105	101	108	107	104	101	107	107	64.9	62.5	59.8	65.1	64.8	63.4	61.2	60.1	60.8	61.7
	A2	13	16	16	16	15	14	14	17	15	7.7	9.5	9.5	9.6	9.1	8.5	8.5	9.6	8.5	8.8
	A3/A4/A5	26	25	26	28	26	29	28	30	30	15.5	14.9	15.4	16.9	15.8	17.7	17.0	16.9	17.0	16.5
	Other	10	10	11	8	7	10	11	16	15	6.0	6.0	6.5	4.8	4.2	6.1	6.7	9.0	8.5	**5.2**
	Vacant	10	12	15	6	10	7	11	8	9	6.0	7.1	8.9	3.6	6.1	4.3	6.7	4.5	5.1	**7.6**
	Total	168	168	169	166	165	164	165	178	176										

source: LBRuT Main Town Centre Land Use Surveys undertaken in Summer. See Notes in Appendix 1. Produced by Planning Policy Section

Notes: *1 – Calculations for the Land Use Survey uses shopping frontage designations from the adopted UDP until 2010 and thereafter DMDPD designations. There have been changes in the centre, in the form of the redesignation of properties from secondary to key frontage in the High Street. Plus new additional secondary frontage, primarily in Oval Court, Broad Street. See LDF DMDPD for details.

5.1b: Comparing Teddington town centre to the UK: which sectors which are well-represented & which under-represented?

Table 69: Sectoral comparison with UK average (floorspace and outlets)

	2005				2011				
	outlets		floorspace		outlets		floorspace		
	number	UK index	amount ft2	UK index	number	UK index	amount ft2	UK index	floorspace converted to m2
comparison retail (non-food shopping)	65	94	104,400	81	59	96	96,800	77	8993
convenience retail (food shopping including newsagents, shoe repairs, markets)	15	96	51,000	63	15	101	44,100	91	4097
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	26	113	32,300	146	35	141	58,100	241	5398
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	39	106	78,700	114	45	111	89,500	117	8315
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	28	132	36,700	126	23	114	37,900	134	3521
vacant	10	59	13,900	63	8	36	12,600	37	1171
total	183		317,000		185		339,000		31494

Notes: Index of 100 = UK average, less than 100 indicates fewer multiples in terms of percentage than the average
Total may not sum due to rounding.

The number of both food and non-food shops in Teddington is very similar to UK average. Floorspace figures are lower than the average for comparison goods shopping, reflecting the size of shops in the centre. GOAD figures suggest a fall in the number of comparison goods shops in the centre between 2005 and 2011. With approx 13,100 m2 of retail floorspace it is the second smallest district centre (Whitton being the smallest) in terms of shopping floorspace.

In comparing the two periods there has been significant growth in retail services such as health and beauty, opticians etc and indeed this sector, the leisure sector and the financial and business services sectors are all well-represented compared to the UK average.

Teddington is an established venue for eating out and drinking. It's food and drink offer is more evenly spread between the sectors than other similar centres, with the exception of the take-away/fast food sector which is more limited. Teddington has considerably more floorspace in the food and drink sector than East Sheen and Whitton, but less than Twickenham and Richmond. The centre has 1,400 m2 of wine bars and another 1,600m2 of pubs, and approx 2,000m2 of both restaurants and cafes. Although there is overlap between the business activities of operators in this sector (for example a gastro pub and a restaurant) the figures suggest a reasonably well-developed food and drink sector which is more diverse than in other district centres.

Under-representation of sectors

Experian surveyed most of the larger town centres across the UK and thus we can compare an individual centre's composition (the types of businesses in the centre) with a hypothetical UK average centre. This is particularly useful if we wish to determine whether there are potential gaps in provision (under-representation) which could be targeted for inward investment should there be scope to do so.

Data are available for outlets and floorspace i.e. we can compare the numbers of businesses in centre in a particular centre to the UK average, and also the amount of floorspace in that sector. To get a full picture of where under-representation might indicate a gap in provision, we must consider both together, as for example there might be fewer outlets in a sector than the UK average, but the floorspace is greater because the size of the outlet/s is relatively large.

Smaller centres will have a more limited role in terms of their role and function and thus fewer shops with a more limited variety.

Table 70: Under-represented sectors in Teddington

Sector	
food retail	types of shops with no outlets in Teddington:
	butchers, frozen foods (gourmet frozen food "Cook" opened subsequently to survey), fishmonger, greengrocers, permanent market
	types of shops under-represented compared to UK average:
	bakers & confectioners (90) - however, in terms of floorspace the figure is much nearer to the national average convenience stores (smaller foodstores) (46) However, in terms of the amount of floorspace, this sector is very well-represented (score of 359). This sector does not include supermarkets which is only under-represented in terms of floorspace not outlets.
non-food	types of shops with no outlets in Teddington:
	catalogue showrooms, clothing general, cycles, department/variety store, gardens & equipment etc, leather & travel, men's accessories, music, video, office supplies, second hand goods (not charity shops), telephones, textiles, vehicle sale & repair, toiletries, cosmetics (not dispensing chemist)
	types of shops under-represented compared to UK average:
	2 sectors are only slightly under-represented footwear (90)- however floorspace in this sector indicates it is well-represented (155), and toiletries etc (89), also with a higher floorspace score (121). Perhaps suggesting that there is no clear market gap. Others less well-represented are: crafts, gifts etc (72) florists (71 in terms of outlets, but 117 in terms of floorspace) cards (65), hardware & household (75 in terms of outlets and only 19 in terms of floorspace suggesting this type of retailer usually occupies a larger unit), jewellery (61), ladies wear (72)
retail service	There may also be scope for other businesses in the retail service sector including photo processing, photography, travel agents with High Street presence & repairs of various types of goods including clothing, TV, vehicles.
financial & business services	Although well-provided for in terms of estate agents, printing & legal services, Teddington has fewer than average businesses in the financial services sector.
leisure	See earlier table for comparison with other centres. According to the data Teddington's entertainment offer is reasonably well-developed, particularly in terms of cafes and restaurants, and in terms of floorspace, wine-bars. Indeed other data suggest that Teddington is a popular evening venue for eating out. Take-aways are less numerous. Sports and leisure facilities are provided just outside the centre's boundary on Vicarage Road. A further hotel has opened recently (Travelodge).

Source: Experian GOAD. © copyright Experian GOAD.

Notes: Data are for the immediate town centre as defined by Experian. They are the latest available. However, businesses will have opened and closed since surveyed.
Figure in brackets is the score comparing Teddington to the UK hypothetical town centre, in terms of outlets (not floorspace). To get a full picture of where under-representation might indicate a gap in provision, the amount of floorspace in that sector must also be considered and where worthy of note is referred to in the text. A score below 100 indicates under-representation. The lower the score, the further from the average.

In terms of the amount of floorspace in the supermarket sector, Teddington is under-represented despite the addition of the Marks & Spencer foodstore in the High Street in Dec 2003. Since 2005 although the amount of food shopping floorspace has dropped, the centre is now nearer to the UK average than previously, indicating a more pronounced change nationally. The overall number of outlets remained the same (15). However, the centre had lost its greengrocer, butcher and fishmonger before this point.

The following section presents data on multiples in the centre. It suggests that the number of multiples in the food shopping sector is similar to the UK average. Since supermarket floorspace is below the national average in Teddington, it implies that other multiple retailers (such as Greggs and Cavan bakery) as well as independents are providing food shopping in the centre. As with the other centres in the borough, most money spent on food is spent in out of centre superstores, including, of particular relevance to this area Sainsburys as Hampton Hill.

5.1 c) Multiple representation in Teddington town centre

Table 71: Multiple representation in Teddington

	2005				2011				
	number of outlets	UK index	amount of floorspace ft2	UK index	number of outlets	UK index	amount of floorspace ft2	UK index	Floorspace converted to m2
total	48		138,200		50		148,100		**13760**
comparison retail (non-food shopping)	12	50	30,600	43	14	64	34,800	49	3230
convenience retail (food shopping including newsagents, shoe repairs, markets)	8	148	42,300	155	5	92	32,900	101	3060
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	0	0	22,600	1,524	9	180	29,200	396	
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	15	144	42,700	169	12	123	33,600	145	3120
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	13	172	0	0	10	126	17,600	133	1640
% operated by a multiple	26.2		43.6		27.0		43.7		
% of **retail sector*3** operated by a multiple	25.0		46.9		25.7		48.0		

Source © copyright Experian

Notes: *1- A multiple has 9 or more outlets. All multiples included retail, retail service, leisure service & financial and business services
*2 - It is the difference between a percentage figure for the centre and the GB average.. Index of 100 = UK average, less than 100 indicates fewer multiples in terms of percentage than the average
*3 - comparison retail and convenience retail.

See Table 10 for borough comparison. According to Experian GOAD there were 50 multiple outlets in Teddington (only 2 more than in 2005), which amounts to 148,100 ft2 (c 13,800m2) of floorspace. This is roughly the same number as East Sheen. 27% of outlets in the centre are operated by a multiple and a quarter of all shops are multiple retailers. Amongst the larger centres only East Sheen has a smaller proportion of multiple retailers as a percentage of all shops represented in the centre.

Perhaps of most interest is that Teddington has far fewer multiples in the non-food retail sector than the UK average, and in fact other similar centres across the borough. It suggests a strong independent sector in non-food retailing in Teddington which no doubt adds to its charm and success.

Multiples in the retail services, leisure and financial and business sectors are well-represented in the borough.

Charity shops

See Table 5 for borough comparison. Teddington had 7 charity shops in 2012 which is 6.3% of all shops in the centre. The GOAD data suggest that compared to the UK, charity shops are well-represented in Teddington (score of 161 for number of outlets, where an average UK score equals 100). However, compared to other larger centres in the borough numbers are low.

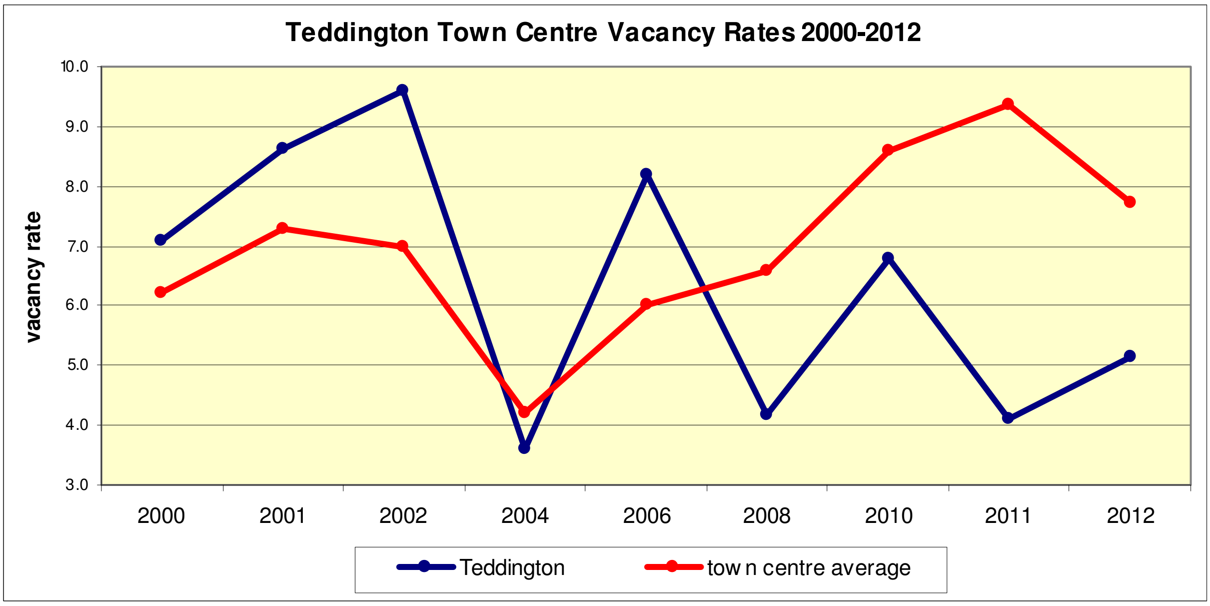
5.2 Vacancy rates

Table 72: Vacancy rates in Teddington (all frontages)

	Vacant uses as percentage of all uses								
	2000	2001	2002	2004	2006	2008	2010	2011	2012
Teddington	7.1	8.6	9.6	3.6	8.2	4.2	6.8	4.1	5.2

Source: LBRuT Town Centre Land Use Surveys undertaken in Summer. Produced by Planning Policy Section

See Table 13 for borough comparison. Teddington has had the lowest vacancy rates of any district centre since 2008. Prior to this vacancy rates were generally higher than the town centre average as the graph below shows. At 5.2% in 2012 rates are well below the national average of c.14%. This is corroborated by data comparing Teddington to a hypothetical UK town produced by Experian GOAD. Teddington has as vacancy score of 36 (for number of outlets) and 37 (for amount of floorspace) and so is well below the UK average of 100.



Source: LBRuT Town Centre Land Use Surveys. Produced by Planning Policy Section

Long-term vacancies
In July 2012 there were only 2 units which were considered to be long-term vacants, i.e. had been vacant for 2 years or more, both located in the Causeway.

5.3 Comparing Teddington with the national picture: benchmarking

Centres at Risk Research
The Javelin Group published a paper[42] in April 2012 identifying a "threat level" in terms of remaining a successful centre, for more than 600 towns across Britain. Teddington is identified as in the "most robust" category amongst smaller centres.

5.4 Retailer Representation

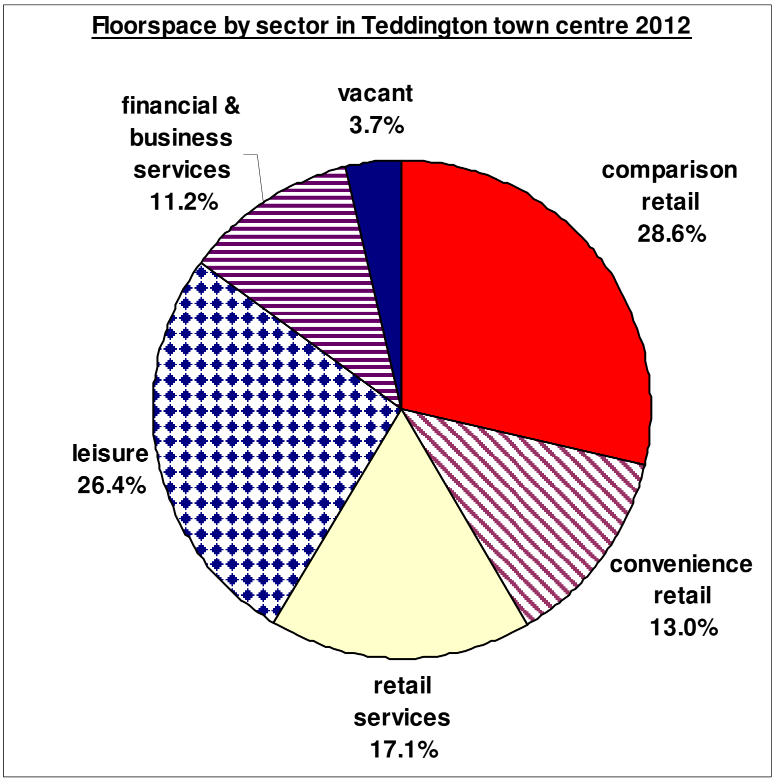
Statistics on searches for commercial property have been obtained from the South London Business database which suggest that for the 2012 calendar year information on available property in the Teddington area was sought on 5,400 occasions. This is a similar figure to other areas in the borough with the exception of Richmond and is similar to other district centres in the region.

5.5 Prime Retail Rents
Zone A rents (£ per ft2) are incomplete for Teddington. See Table 18 above. The latest figure available from Colliers International being £55/ft2 in 2008.

Anecdotal information provided by local agents in July 2012 suggests that in Twickenham and Teddington, there is limited demand for multiples. Rents achieved are between £25-£60 per sq ft, depending on where they are. In Teddington, there is a good mix of shops and an affluent market with the High St and Broad St doing well.

[42] Javelin Group – Battlefield Britain: Survivors & Casualties in the fight for the High Street, April 2012

5.6 Floorspace



Source: Experian GOAD. © copyright Experian GOAD.

2011 Experian GOAD floorspace estimates by sector are included in full in Table 20. There is an estimated 31,500m2 of floorspace in Teddington (2011), and on this basis is marginally smaller than East Sheen. Of the retail floorspace, c.9,000 m2 is comparison floorspace and 4,100 convenience floorspace.

5.7 Employment in town centres

Source: NOMIS Ward Labour Market Profiles.

Workforce data have not yet been released for the 2011 Census. Teddington ward is a reasonable fit with the town centre, albeit that the boundaries extend further, and notably include businesses on Waldegrave Road and at NPL which are major employers. According to the 2001 Census approximately 8,300 people make up the daytime population in this ward (Teddington), which is sizable. Approximately 6,400 people make up the workforce element of the daytime population which is significantly higher than in East Sheen and Whitton. The daytime population comprises those who work in the area and those who live in the area and do not work.

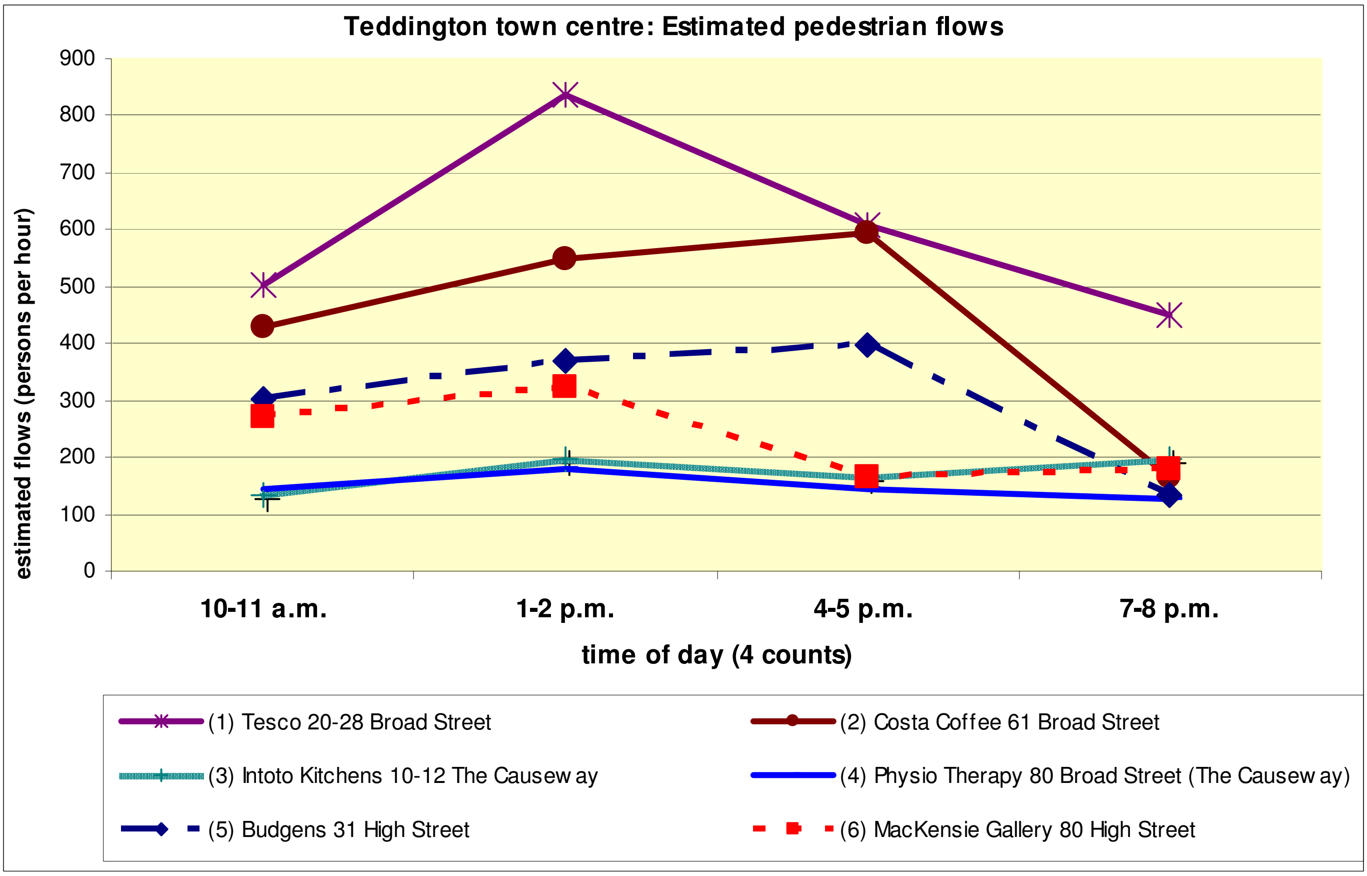
Table 73: Daytime populations in wards which best-fit with town centre boundaries.

Town centre (best fit with ward)	Number of people
Richmond	12,200
Twickenham	8,700
Teddington	8,300
East Sheen	5,300
Whitton	3,900
Barnes	5,000

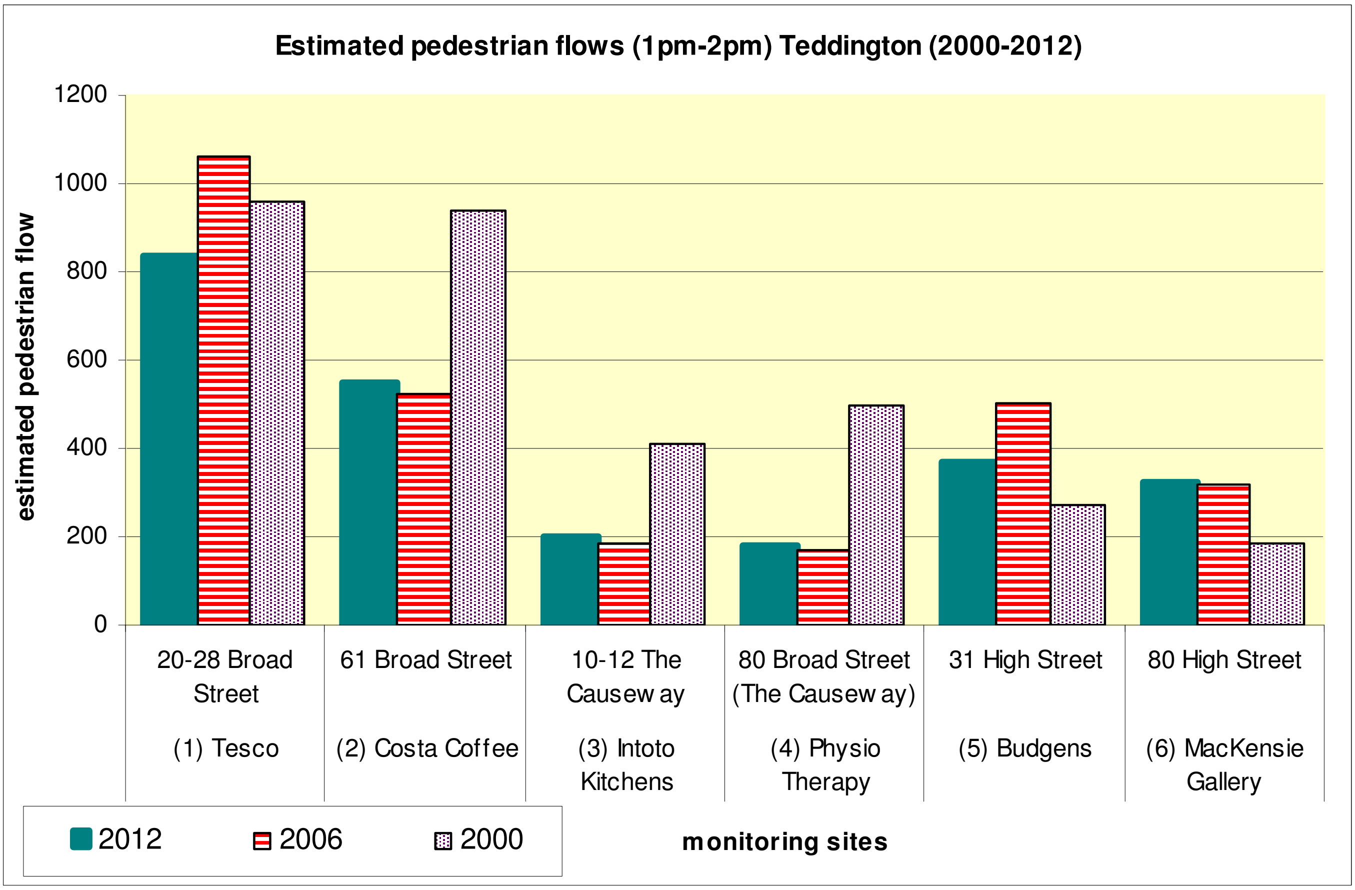
Source 2001 Census. © Crown Copyright

5.8 Footfall

Pedestrian flows counts were undertaken at 6 monitoring sites across the centre in October 2012, updating counts undertaken in 2000 and 2006. 9 minute counts were taken at each site which were then factored up to represent an estimated hourly rate. The map below shows the location of the sites and identifies the estimated count at the lunchtime peak. The Table on the following page presents the data in full.



Source: LBRuT monitoring. Produced by Planning Policy Section



Source: LBRuT monitoring. Produced by Planning Policy Section

Table 74: Estimated pedestrian flowcounts in Teddington town centre 2000, 2006 & 2012

		2012				2006				2000			
Premises Name	Address	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.
(1) Tesco	20-28 Broad Street	502	838	607	449	492	1062	804	498	510	958	649	302
(2) Costa Coffee	61 Broad Street	429	548	594	165	450	522	444	192	466	939	504	151
(3) Intoto Kitchens	10-12 The Causeway	132	198	165	198	108	186	150	264	284	410	290	76
(4) Physio Therapy	80 Broad Street (The Causeway)	145	178	145	125	96	168	150	30	214	498	252	302
(5) Budgens	31 High Street	304	370*	396	132	342	504	384	108	76	271	107	69
(6) MacKensie Gallery	80 High Street	271	323	165	178	186	318	180	132	101	183	95	113

Source LBRuT Monitoring. Planning Policy Team. Survey date: Thursday 27th September

Weather conditions 2012: Mild and dry

Notes - Figures are extrapolated from 9 minute counts.

Red indicates the highest counts at each session, and blue the lowest.

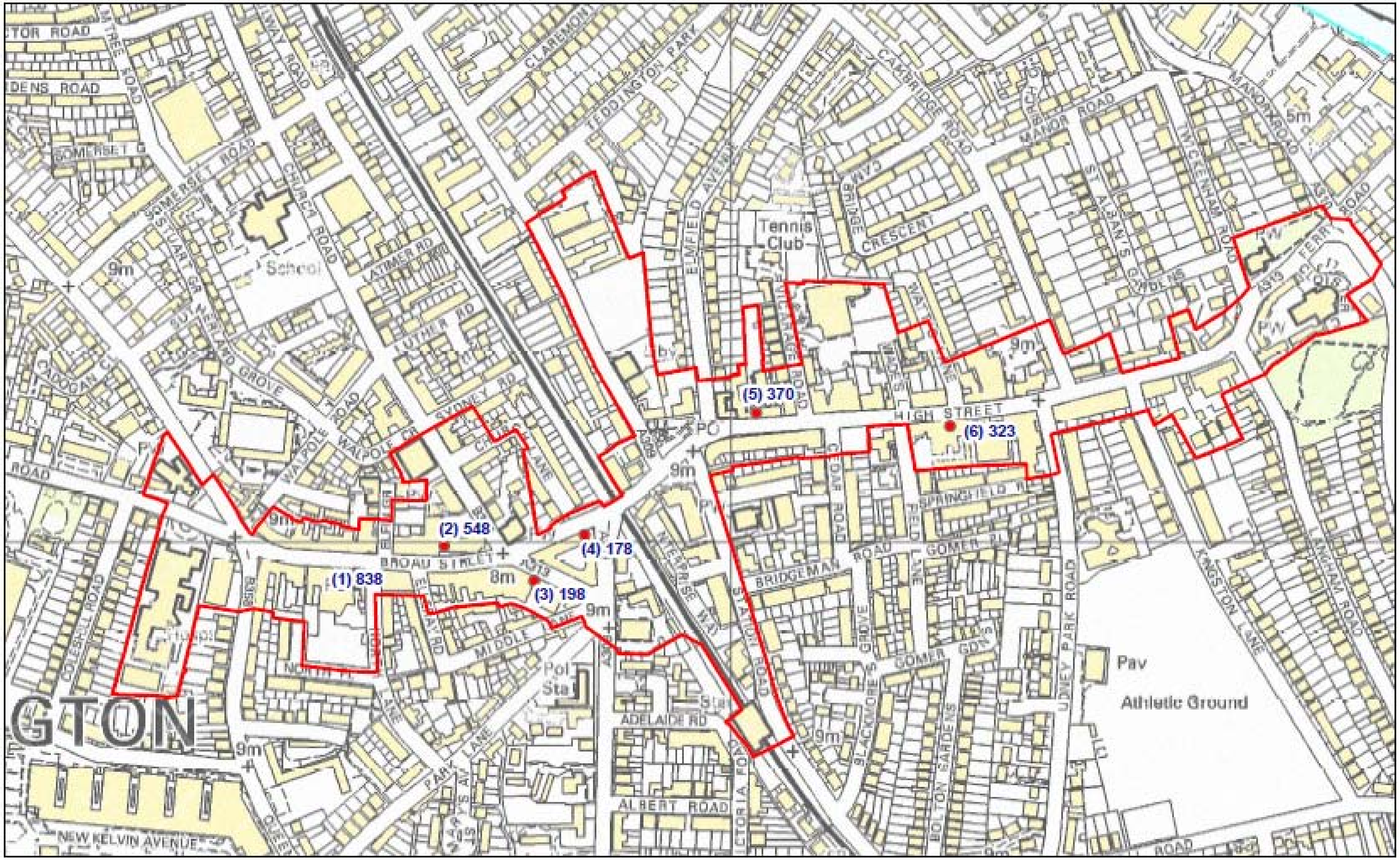
The clear pattern emerging for Teddington is that the monitoring site outside of the largest supermarket (Tesco) in Broad Street has the highest footfall. This has consistently been the case in 2000, 2006 and 2012. In general Broad Street has higher footfall than the High Street. At lunch time, as illustrated by the map below, the Tesco monitoring site has significantly higher footfall than any other which could be due to the relatively large workforce in the area. The site which is nearest the Marks and Spencer foodstore on the High Street does not record such high levels, although this point is located on the opposite side of the road. In the future it may be necessary to add further monitoring sites to the centre to the east of the High Street. The Council is currently determining a planning application for a Sainsburys Local at 196 High Street.

The lowest footfall is recorded at the two sites on the Causeway in both 2006 and 2012. Previously in 2000 the two sites in the High Street recorded the fewest pedestrians. The Marks and Spencer store opened in Dec 2003 and this could well have contributed to an increase in footfall in the High Street end of the centre.

There is more consistency in levels of footfall in Teddington throughout the day than in some of the other centres, with figures generally dropping significantly in the early evening. However, the centre is marginally busier in the afternoon and there is a discernible lunchtime peak at the Tesco site. Figures show a sizable daytime population.

As a rough guide to assess changing patterns over the years, an average count for all the monitoring points was calculated. Teddington is unusual in that along with Whitton, footfall has remained at similar levels to those recorded in 2006, whereas footfall has dropped in the other centres. Teddington and Whitton provide a more local role than three larger centres and this may be part of the explanation. However, more frequent monitoring would be needed to confirm data trends.

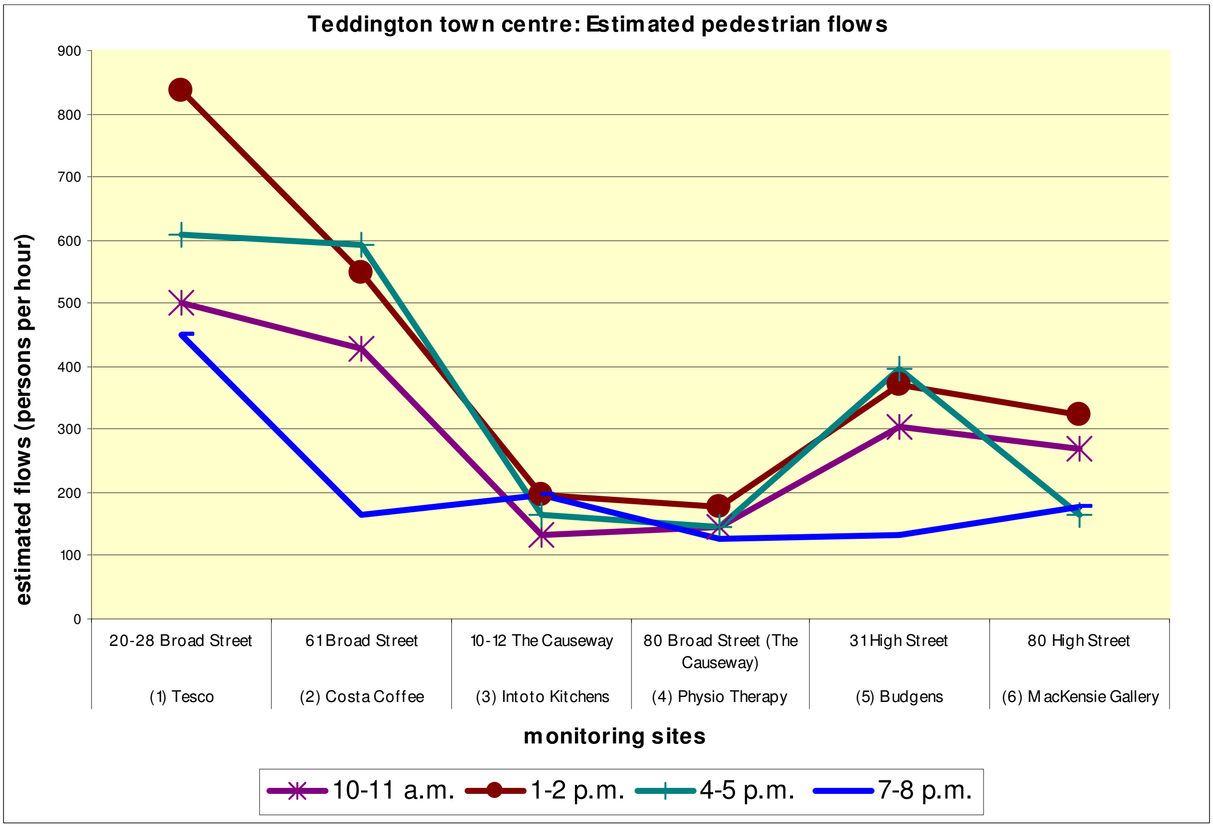
Pedestrian flowcounts in Teddington (estimated hourly flows 1 to 2 pm) Sept 2012



source: LBRuT monitoring
Produced by Planning Policy Team
Contact: Fiona O'Toole, f.o'toole@richmond.gov.uk

Legend

Town centre boundaries



Source: LBRuT monitoring. Produced by Planning Policy Section

5.9 Accessibility & parking

Table 75: Bus Routes – Teddington town centre

	number of buses per hour							List of key centres passed through
	Monday to Friday			Saturday		Sunday		
Service Number	Peak	Off peak	Eves	Day	Eves	Day	Eves	
R68	4	4	3	4	3	4	3	Hampton Court, Teddington, Twickenham, Richmond
33	7	7	4	7	6	7	4	Hammersmith, East Sheen, Richmond, Twickenham, Teddington
281	8	8	5	8	5	5	5	Kingston, Teddington, Twickenham, Whitton, Hounslow
285	6	6	5	6	4	5	4	Kingston, Teddington
481	1	1	1	1	1 (limited)	-	-	Kingston, Teddington, Whitton, West Middlesex Hospital
X26	2	2	1/2	2	2	2	2	Heathrow, Teddington, Croydon

Source: LBRUT Transport
Notes * = Buses on route 33 run more frequently between Richmond and Hammersmith at the times indicated

Table 76: Train Routes – Teddington town centre

Teddington	Trains per hour
London Waterloo loop (via Kingston)	2
To Shepperton	2
Total number of trains and underground services arriving at Teddington	***8***

Source LBRuT Transport

There are 8 trains an hour passing through Teddington BR station and 6 bus routes. A list of car parks in the centre is provided below:

Table 77: Teddington town centre car park capacity

Cedar Road	Operated by Council. Max stay 2 hours during operational hours	22 cars, 1 motorcycle
North Lane West	Operated by Council. Max stay 3 hours during operational hours	79 cars, 4 disabled, 1 motorcycle
North Lane East	Operated by Council. Max stay 3 hours during operational hours	27 cars, 2 disabled
Teddington Station	Max stay 24 hours	8 cars
Teddington Pool	4 hours between 8:00am to 6:00pm period Saturday and Sunday	42 cars, 2 disabled, 1 motorcycle
Marks & Spencer	Mon-Sun 24 hours	

Source: LBRUT Transport Section, and other

Full details are available at http://www.richmond.gov.uk/home/transport_and_streets/parking/car_parks/content-parking_teddington_area_car_parks.htm.

Teddington town centre is mostly in a PTAL (Public Transport Accessibility Level) 3, which is described as moderate.

5.10 Customer and resident's views

The Council's All in One Consultation was undertaken in November 2010 and followed up with a series of local events. The full results for this area can be viewed on the Council's website using the following link: http://www.richmond.gov.uk/teddingtona4_web_.pdf.

Key results are:

The things that were most important in making it a good place to live included:

- 78% - Local parks and open spaces
- 39% - Shopping in your local high street
- 37% - Level of crime and anti-social behaviour
- 35% - Public transport
- 22% - Education and schools
- 21% - Library services

The things that most needed improving in your area included:

- 33% - Condition of pavements
- 30% - Traffic and/or levels of congestion
- 22% - Provision of parking
- 22% - Affordability of local housing
- 20% - Development and planning issues
- 20% - Condition of roads

There were 1962 responses in this area.

5.11 Perception of safety and occurrence of crime

Anti Social Behaviour (ASB) levels

Data on Anti Social Behaviour levels reported to the Council for the period 2011-12 are available for the main town centre wards. ASB is gathered every month from three council databases which makes amalgamating data more difficult. The data provided covers 80% of the ASB total for the year.

Key facts for the borough as a whole are presented in the relevant section for Richmond town centre. Much of the reporting relates to littering, and usually occurs after 8pm on weekends. ASB reporting is based on perception and is therefore subjective. Most reports are concerned with "Environmental ASB", relating to a physical location rather than a person. Reports concerning the later are usually addressed directly to the police. "Environmental ASB" includes littering and fly tipping. However one-fifth of calls related to Noise, which is nine times out of ten an issue with human interaction and tolerance levels.

Of the three main ASB categories[43], barely 1% of council ASB calls/reports fall under the most serious category Level One (Personal). Around 14% of calls fall under Level Two (Nuisance) and 85% of calls/reports fall under the least serious category Level Three (Environmental).

Table 78: ASB Reporting 2011/12

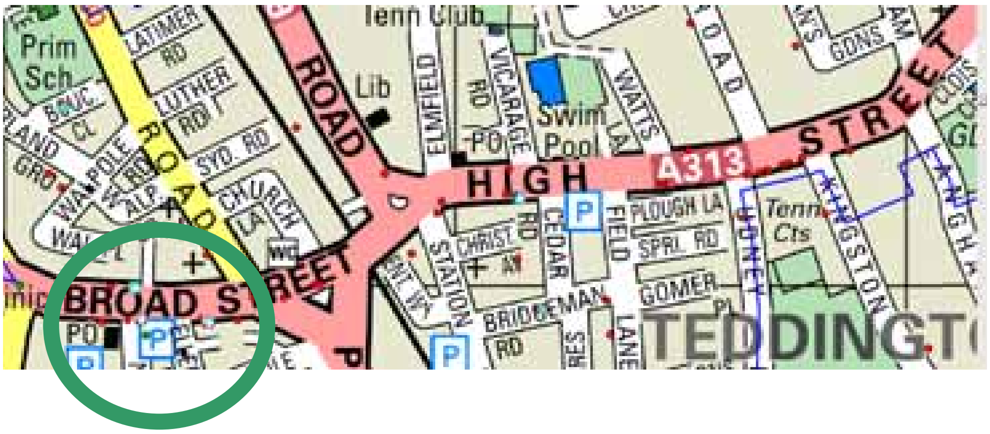
Centre	Number of ASB reports in centre	Environs*1	% ASB taking place in centre	ASB Level
Barnes	42	182	22%	Low
Whitton	42	137	31%	Low
East Sheen	127	288	44%	Medium
Teddington	62	240	26%	Low
Twickenham	219	390	59%	Medium-High
Richmond	276	471	59%	Medium-High

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Notes *1 = covers the area around the main town centres, which is not the entire ward, as defined by the Community Safety Data Analyst

Reporting of ASB in the Teddington area is considered to be low, both compared to other district centres and a regional level. The town centre itself was not making a significant contribution to overall ASB reporting levels in 2011/12.

Figure: Map of ASB calls/ incidents in Teddington town centre area 2011/12



Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Notes

2. These maps are a pictorial illustration and do not show all the ASB recorded in the total figure. Ward level identification has been used when mapping co-ordinates are not available. The green circle indicates the ASB hotspot.

Key findings:

- There were 62 reports of ASB in Teddington town centre during 2011-12, which is an average of 5 calls/reports per month.
- Most reporting relates to littering, closely followed by noise. The green circle designates the ASB "hotspot" on Broad Street (frontages to the west of the intersection with the Causeway).
- There were 240 ASB reports in the wider Teddington area, 26% of which were in the town centre.
- Teddington town centre is considered to have low levels of ASB

ii Crime levels in town centre wards

The following table shows crime levels for the main wards linked to the town centres, where the town centre is more than 75% contained in a ward boundary. It reflects the trends and emerging crime situation in the vicinity of these areas.

[43] Personal : 'Personal' is designed to identify ASB incidents that the caller, call-handler or anyone else perceives as either deliberately targeted at an individual or group or having an impact on an individual or group rather than the community at large.
Nuisance: 'Nuisance' captures those incidents where an act, condition, thing or person causes trouble, annoyance, inconvenience, offence or suffering to the local community in general rather than to individual victims
Environmental: 'Environmental' deals with the interface between people and places. It includes incidents where individuals and groups have an impact on their surroundings including natural, built and social environments.

It compares "Volume Crimes", those which are most prolific, for 3 wards which encompass Teddington, Twickenham and Richmond town centres. They are the crimes which are typical to town centre locations and which are most prolific in the borough.

In Teddington ward, Violence Against the Person is relatively low compared to both Twickenham Riverside and South Richmond wards. There are more reported cases of theft and handling, albeit that the figures for the first quarter of 2012/2013 have dropped significantly from the same period in the previous year. The later figures are significantly lower than in the other two wards.

Table 79: Crime levels in selected town centre wards

	violence against the person			theft & handling			total crimes		
Ward	Q1 2011/12	Q1 2012/13	Change	Q1 2011/12	Q1 2012/13	Change	Q1 2011/12	Q1 2012/13	Change
Teddington	15	20	5	74	49	-25	144	129	-15
Twickenham Riverside	40	44	4	75	95	20	197	211	14
South Richmond	53	67	14	193	205	12	356	389	33

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

(c) Perception of safety and use of centre in the evening

The full dataset is presented in section x. Of the Survey of 1,000 households, only a very small number 1.3% of those respondents who specified a centre, identified Teddington as a location where they felt unsafe in the evening or after dark. Teddington was identified as a popular location for eating, and less so for drinking.

5.12 State of the town centre: environmental quality

Overall, Teddington town centre has 3 designated Public Open Spaces and 5 sites designated as Other Open Land of Townscape Importance; a very small area in the west of the town is in an Area poorly provided with Public Open Space. The town centre has some historic assets (11 Listed Buildings and 108 Buildings of Townscape Merit); two Conservation Areas cover the eastern part of the town centre. In comparison to the other larger town centres, the air quality is reasonable in Teddington. There are four diffusion tubes within the town centre, whereby the worst air quality has been measured in Broad Street, followed by High Street – at both locations the levels exceeded the objective. However, the monitors in Queen's Road and The Causeway showed results that have met the air quality objective.

The environmental quality of Teddington town centre has been assessed by dividing the centre into seven areas: (1) Memorial Hospital, Methodist Church, (2) Broad Street, (3) The Causeway, Church Road, (4) Station and surroundings (Station Road), (5) Waldegrave Road, (6) High Street, including Vicarage Road, and (7) Lower end of High Street and Ferry Road. See Appendix 4 for a map of the areas that have been surveyed.

The western part of the town centre, **Memorial Hospital and Methodist Church (Area 1)**, is a very pleasant area despite the busy junction. There is a good choice and provision of vegetation and soft landscaping; paving and road surfacing is generally of good quality. No problems have been recorded in relation to litter, fly-posting, graffiti or fly-tipping. The area does not feel cluttered and there is a good provision of street furniture, although some of it is slightly dated.

Broad Street (Area 2) is characterised by a busy road with lots of parking and loading activities. The paving and surfacing materials are very patchy and in need of repair at some locations; repaving is underway in some parts. There is limited scope for soft landscaping and tree planting. The area generally does not feel too cluttered and the provision and choice of street furniture is considered to be reasonable; the Council will a look at replacing street furniture, subject to funding. Some minor issues were recorded in relation to litter and fly-tipping. Overall, despite the traffic impacts, this is considered to be a very busy and vibrant area with very few empty shops. Since the survey, repaving works have been undertaken.

The Causeway (Area 3) is also characterised by a busy junction. There are currently repaving and repair works being carried out in this area. There is good provision of street trees and soft landscaping, including street furniture in this area. The Council will look at replacing street furniture, subject to funding. There are no associated problems with litter, graffiti or fly-tipping and overall, this is a very pleasant area given the traffic related impacts.

Teddington Station and its surroundings (Area 4) is a pleasant area with high environmental quality, a newly designed roundabout, new road surfacing on the main road and good quality and provision of trees/vegetation. Some sections off the main road are very patchy and in need of repair; this also applies to the tree-root-damaged pavement sections leading towards the station. There is good quality provision of street furniture and no issues have been recorded in relation to graffiti, fly-tipping or litter (except some minor incidents in the open space area).

Waldegrave Road (Area 5) is a very wide and busy road with lots of mature street trees and soft landscaping. Although the road is very patchy and some pavements are very narrow and damaged by tree roots, this is generally a pleasant area, with a small public space and good quality provision of street furniture.

Teddington High Street (Area 6) is a very pleasant area with high environmental quality, good quality provision of street trees and hanging baskets. The street furniture is of good quality and generally the area does not feel cluttered. Overall, the pavements are wide with the exception of some narrow sections and some minor damages to the surface. There are no problems associated with litter, fly-posting, graffiti or fly-tipping in this area.

The **lower end of the High Street and Ferry Road (Area 7)** is less busy and congested in comparison to the High Street, although the junction of Ferry Road and Kingston Road does lead to some build up of traffic. Whilst there are a number of signs and adverts near the Arts Centre, the area does not feel cluttered and has no litter, graffiti or fly-tipping problems. Overall, this part of the town is very pleasant due to its street trees, landscaping, wide pavements, open spaces and interesting buildings, and therefore considered to be of very high environmental quality.

See Appendix 3 for the detailed results of the desk-based assessment, including analysis of open spaces, historic assets, air quality etc.

The individual survey sheets for the areas assessed can be found in Appendix 5.

5.13 Implementation of proposal sites

Table 80: Implementation of UDP Proposal Sites in Teddington town centre boundary

Proposal site		Description	Progress in 2007/08	Progress in 2008/09	Progress in 2009/10	Progress in 2010/11	Progress in 2011/12
D3	Teddington Library	library extension	not implemented	not implemented	implemented	implemented	implemented
D4	Teddington station	station car park & environmental improvements	not implemented	not implemented	not implemented	not implemented	not implemented
D5	Queens Road Clinic	rebuild clinic	not implemented	Under construction	Under construction	implemented	implemented
D6	The Causeway, Teddington	pedestrian enhancement	not implemented	not implemented	not implemented	not implemented	not implemented, but discussions underway.

Source: Extract from Appendix 2 of Annual Monitoring Report 2011/12

Two of the four proposal sites with the town centre boundary have been implemented. Currently those proposal sites saved from the UDP remain part of the development plan. However, it should be noted that work is underway on the Site Allocations DPD which may well include further sites in the town centre.

5.14 Completions and commitments

Table 81: Use Class (shop) completions within Teddington town centre boundary 1/10/2007 to 1/4/2012

			New completed floorspace 1*			Net additional floorspace 2* (taking account of losses)		
application ref	address	summary of proposal	new completed floorspace (m2) (gross external)	new gross internal floorspace m2 3* (gross internal)	of which net tradable floorspace m2 4* (gross internal)	net additional floorspace (gross external)	net additional floorspace (gross internal)	of which net tradable floorspace
10/0987/COU	81A High Street, Teddington, TW11 8HG	Change of use from B1/A2 (office use/financial and professional services) to A1 (hair salon)	108	104.0	**83.2**			
09/3175/COU	28A High Street, Teddington, Middlesex, TW11 8EW	Change of use of first floor from part of residential maisonette to shop, to be used with existing shop at 28 High Street.	55	52.9	**42.4**	55	52.9	**42.4**
10/2447/COU	160 - 162 High Street, Teddington	Change of use of property to a D1(veterinary) use with ancillary A1 (retail) use.	12	11.6	12.0	12	11.6	12.0
06/3645	160-162 High Street, Teddington	Change of use from A1/B1 to A2	-	-	-	-22	-21.2	**-16.9**
09/1455	80 Broad Street	Change of use from A1/A2 retail to D1 Physiotherapy use.				-76	-73.2	**-58.5**
06/3837	12 Church Road, Teddington	New shopfront and entrance to ground floor retail unit. Conversion of rear living accommodation into new ground floor garden flat and first floor living accommodation into a separate 2 bed flat.	10	9.6	6	10	9.6	6
07/1495	11 Church Road, Teddington	Extension to ground floor rear premises and provision of a 1 bed flat	-	-	-	-40	-38.5	2.0
06/4057	61-63 High Street, Teddington	Change of use from A1 to A2	-	-	-	-162	-155.9	-124.0
06/0645	70 High Street, Teddington	Demolition of existing building and erection of 2.5 storey building comprising ground floor commercial (A1 and A2) with 8x residential flats above (3x one bed, 5x two bed).	131	126.1	**100.9**	131	126.1	**100.9**
08/3036	70 High Street, Teddington	Change of use from A1 and A2 (shops and financial professional) to mixed A1/A3 (coffee shop				-82	-78.9	**-63.1**
07/3498	196 High Street	Change of use of premises currently trading as a motor vehicle showroom and after sales facility (Sui Generis) to a retail tile showroom and shop (use class A1)	452	435.1	**348.0**	452	435.1	**348.0**
07/4407	61 Broad Street	Change of use to a coffee shop (mixed A1 /A3 use - Restaurant /Cafe)				-103	-99.1	**-79.3**
10/2462/FUL	47 Broad Street	Alteration and extension to rear of property to provide customer seating to existing Cafe Nero at ground floor level and entrance to new maisonette above. …..				-76	-73.2	**-58.5**
09/3175/FUL	28A High Street	Change of use of first floor from part of residential maisonette to shop, to be used with existing shop at 28 High Street.	45	43.3	43.3	45	43.3	43.3
		TOTAL	813	782.5	635.7	144	138.6	154.1
		TOTAL (taking into account subsequent applications 6*)	731	703.6	556.4			

Source : LBRuT Decisions Analysis system. Produced by Planning Policy Section.

Notes:

1* - New floorspace completions plus gains from change of use and conversions
2* - Net additional floorspace - takes account of losses and gains
3* Difference between gross external and gross internal floorspace defined by DCLG as 3.75%
4* Net tradable floorspace is the amount of gross internal floorspace which is trading floorspace i.e. sales space which customers have access to. Where retail sales area of either the existing or proposed development, or both is not known a proxy is calculated using a 80/20 ratio **(identified in bold)**
5* Figures not included as this is a continuation of an existing use.
6* Over the period a newbuild mixed use scheme introduced retail floorspace at 70 High Street, which was subsequently reduced by a later completion (change of use to A1/A3). Also, at 160-162 High Street, a change of use reduced the A1 element. However a later completion re-introduced retail. (albeit a relatively small amount)

Taking into account applications which have further added to or reduced the amount of retail floorspace over the last c. 5 years there has been an overall increase in retail floorspace in Teddington. Just over half of this is due to the change of use of a former car showroom (sui generis) to a now furniture shop at 196 High Street. Prior to this the addition of the Marks and Spencer store in the High Street is the most significant change to retail provision (completed 2003). There is little in the pipeline coming forward in the short term. However, it should be noted that an application is currently being determined to use 196 High Street as a Sainsburys Local (12/3584/FUL).

Commitments

Table 82: Commitments in pipeline (additional retail) in Teddington town centre (outstanding at Apr 2012)

				Additional retail in pipeline		
application ref	decision date	address	Proposal	approx retail sales area m2	Ancillary retail m2	total m2
05/0007/EXT	24-Feb-10	8 - 10 High Street Teddington	Erection of two single storey rear extensions and conversion of first and second floor maisonettes into four self contained flats(2 no. 2 bed and 2 no. 1 bed)			4
12/0138/COU	27-Feb-12	Maisonette 57 High Street Teddington TW11 8HA	Change of use of upper floors from C3 residential to A1 (beauty salon)			80
			TOTAL	**0**	**0**	**84**

Source: LBRuT Decisions Analysis system. Produced by Planning Policy Section **.**
Notes: Table includes additional space only, not where there is a reduction in retail space.

5.15 Potential for growth & change

The Council commissioned consultants GVA Grimley to produce a retail capacity study forming part of the evidence base for the LDF. Details of this study are presented in section 2.15.

Capacity projections 2006 & 2009

The revised assessment (2009) suggests a pattern which is broadly the same as the earlier assessment. See Table 34 for capacity forecasts for all town centres. For Teddington town centre the revised forecasts suggest **capacity for 1511 m2 net for convenience (food) floorspace by 2016, rising marginally to 1777m2 net by 2021**[44]. After this point (2026) capacity arises again to 2,074m2 net, although such long range forecasts should be treated with caution. For **comparison goods** Teddington has a much lower **estimated capacity of just 95m^2 in 2016 rising to 350m2 net**[45] **by 2021,** and rising again to 658 m2 net by 2026.

The net figures can be translated into gross town centre floorspace (including non-sales areas) by applying an appropriate gross to net ratio (65%). The gross figure also includes a further 15% for A3, A4 and A5 uses in the scheme, making a total ratio of c 80/20[46]. **Gross comparison capacity is also forecast as 171 m^2 by 2016 and 634 m^2 by 2021**. Overall, therefore this research suggests a **quantitative need to provide retail floorspace in the town centre which translates as an indicative very modest requirement of 300m2 net by 2017/18 in the adopted Core Strategy (para 6.1.14)**[47]**.**

The Study concludes that in general, proposals coming forward should be directed to the borough's town centres in the first instance. The scale of such development should be considered, as should the implications for existing floorspace and the potential to clawback money leaking from the catchment area. Since a proportion of the capacity arises from out of centre development, and bearing in mind that town centre sites should be considered first, there is potential to support more floorspace than identified in the analysis. It goes on to say that the Council should be proactive in planning for the borough's town centres bearing in mind the potential threat from Westfield shopping centre.

Scope for development

The Consultants recommended that policies should be strictly applied to retain existing shopping and maintain the balance of uses and that LDF should seek to consolidate & enhance.

As part of the Study a number of sites were assessed in each town centre on the basis of an initial appraisal only and future viability testing was anticipated. The selection was not necessarily exhaustive & site boundaries only indicative.

Recommendations:

- Telephone exchange – well-integrated with shopping frontages & would be suitable for a mixed use scheme.

[44] Residual expenditure is converted to floorspace using a sales density of £10,000 per m2, a minimum level required by most major food retailers.
[45] Assuming new comparison floorspace achieves a sales density of c. £5,000m2 net.
[46] It does not include leisure floorspace
[47] Subject to testing of site availability at Site Allocations stage

- Paint Research station – beyond core shopping area. Could have a detrimental effect on retail function of Teddington town centre. This site has now been developed for B1 office.

5.16 Town centre management & economic development

Teddington has two organisations which provide active support for businesses. The lead business body is the Teddington Business Community (TBC) and there is a separate body, the Teddington Lights Up Committee, which handles the Christmas campaign each year. Much of the 2012/13 allocation of £5,000 from the Council's Town Centre Opportunities Fund has been spent on funding a part-time Town Centre Liaison Post and in developing a website for the town.

Summary

Teddington's mix of business uses is similar to the average for the larger borough centres and is also similar to the UK average, with the exception of a lower vacancy rate than the norm. The number of shops in the centre (112) has remained stable for the last 5 years. With approx 13,100 m2 of retail floorspace it is the second smallest district centre in this respect. The number of shops mirrors the UK average, although the amount of floorspace in the comparison sector is lower. 69% of Teddington's shopping floorspace sells non-food goods and this is more on a par with Whitton than the larger centres of East Sheen, Twickenham, and Richmond. The much larger centre of Kingston is located nearby which has a regional comparison shopping role. Teddington is under-represented in terms of supermarket floorspace compared to the UK average. It has noticeably fewer multiples amongst comparison goods retailers which illustrates its diversity and could be considered a strength.

Teddington is an established venue for eating out and drinking. It has a more diverse offer than in other district centres being more evenly spread between the restaurant, café, wine bar & pub sectors (although it is acknowledged that there is overlap in business activities between some sectors) with the exception of the take-away/fast food sector which is more limited.

The overall picture for Teddington is a positive one. Vacancy rates are regarded as a key indicator of the health of a town centre, and Teddington has had the lowest vacancy rates of any district centre since 2008. At 5.2% in 2012 rates are well below the national average of c.14%. Anecdotal information on rents suggests that they are holding their own. Footfall levels have not fallen as they have in some of the other centres. Generally footfall is higher in Broad Street than in the High Street, especially outside Tesco which is a key anchor. Research undertaken by the Javelin Group suggests that Teddington is well-placed to withstand the recession.

Community facilities have been improved in Teddington as proposal sites have been implemented. Figures show that the overall amount of completed retail floorspace has not significantly increased in the last 5 years. There is some limited capacity for retail growth and a very modest allocation in the Core Strategy.

Teddington is a pleasant centre which benefits from a high quality public realm. Consultation reveals that local residents value the parks and open spaces and shopping facilities in the area. Actual crime in the centre is comparatively low and not on a scale with Twickenham and Richmond but higher than the other district centres. Anti-social behaviour reporting is concerned with littering and to a lesser extent noise. This may be related to its food and drink offer which is reasonably well-developed.

In short, most of the indicators support the conclusion that Teddington is a buoyant district centre, which is successful despite its proximity to Kingston. It has two active business associations which help to support its vitality. This is not to say that businesses in the centre are not operating in challenging economic circumstances.

6: Whitton town centre

Introduction

Regional context

The London Plan defines Whitton as a district centre, as such its main purpose is to provide convenience goods and services to local communities. It is considered as a suitable location for “medium growth” (policy A2.6)[48], i.e. a “town centre(s) with moderate levels of demand for retail, leisure or office floorspace and with physical and public transport capacity to accommodate it.”

Village plan for Whitton

The Council has produced a series of Village Plans following extensive consultation through an All-In-Survey. Please use the following link to access the following web pages.
http://www.richmond.gov.uk/whitton_and_heathfield_area_village_plan.htm#c1

The vision set out in the Village Plan includes the following relating to town centres:

Whitton is a self contained town with a unique 1930s village atmosphere. It has a distinctive character which should be reinforced in this plan. This includes protecting its unique architecture, within and external of the high street, and enabling village events such as a market or regular cultural events utilising buildings such as Kneller Hall.

Further efforts should be expended to maintain the momentum achieved in regenerating the High Street through the Uplift Strategy to encourage a greater variety of shops including greater consideration as to how to foster an evening economy.

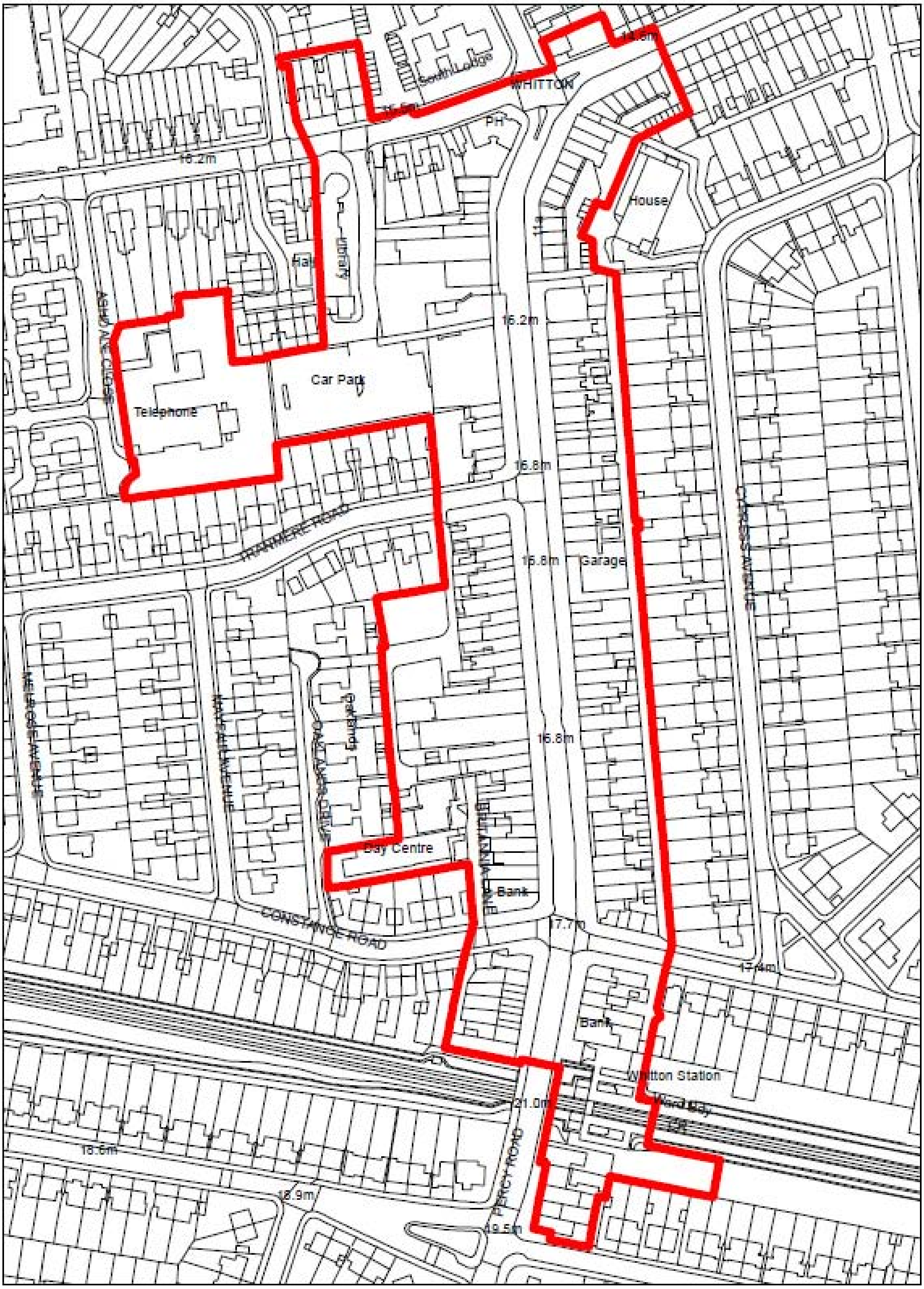
Development opportunities should also be considered at Whitton Station, in collaboration with Network Rail. As a key transport interchange and a vital link to central London the station is in need of an upgrade, not only to its rail infrastructure but to the station building itself. It is a gateway to Twickenham Stadium and will be an essential part of plans for the Rugby World Cup 2015.

Further development opportunities for community use exist at Murray Park where the Hall is currently in a dilapidated state.

The consolidation and improvement of Whitton Library will be considered alongside the Whitton Uplift strategy and options for bringing it onto the High Street.

[48] However, it is acknowledged that such categorisations are indicative and refer to the broad potential for the whole centre and not individual sites.

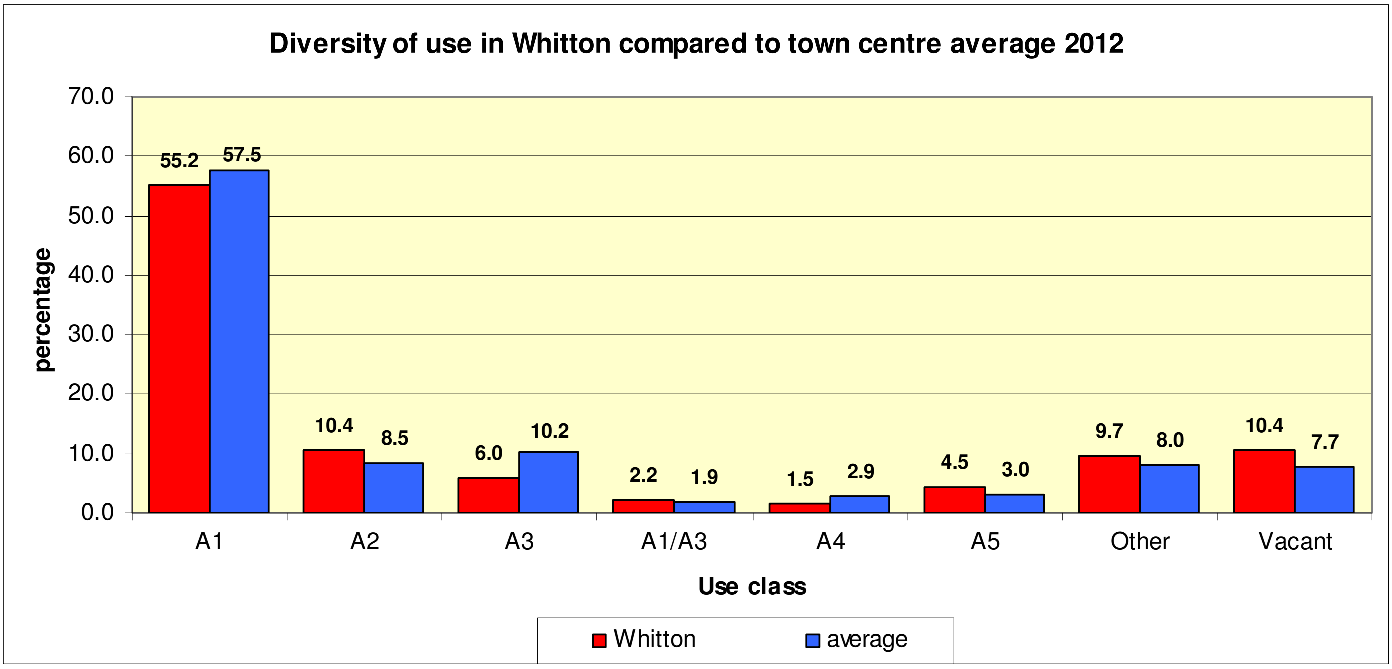
Whitton district centre



source: LBRuT Land Use Survey Data
Produced by Policy & Design Section, Environment
Contact: Fiona O'Toole

6.1 Diversity of main town centre uses

6.1 a) Mix of uses: business activity



Source: LBRuT Town Centre Land Use Surveys

Whitton's mix of businesses differs from the average mix for the 5 larger centres in the borough. It has a slightly smaller proportion of shops, A2 uses (financial uses) and the A3 uses (cafes/restaurants). Conversely it has higher proportions of take-aways, "other uses" (which includes the miscellaneous use class, offices etc). Vacancy levels are higher in Whitton than in the other district centres in the borough. This pattern reflects its local role. It is by far the smallest of the district centres with approximately 12,300m2 of floorspace and 5,800m2 of comparison shopping. It has less shopping floorspace than Barnes local centre, and approximately a third of what is available in East Sheen and Teddington.

The following page presents detailed data on the types of businesses in Whitton over the last decade or so. A key consideration is whether the overall number of shops has changed. In line with the larger centres in the borough numbers of shops have generally fallen from historic highs but risen again in the last couple of years. Whitton has 74 shops covered by the Council's land use survey, whereas in 2000 it had 86. Vacancy levels have fluctuated in the centre, and although high compared to other district centres, numbers are not as high as they were in 2008 and 2001. Numbers of businesses in the food and drink sector have increased steadily over the period.

Table 83: Growth in key sectors in Whitton's town centre boundary:

	Number of outlets 1998	Number of outlets 2012	GOAD score for type of business (100 = UK average *1)
Cafes/coffee shop	2	6	123
Pubs	1	1	28
Restaurants	1	3	55
Estate agents	7	6	141
Betting shops	1	3	177

Source: LBRuT Town Centre Land Use Surveys. Figures are restricted to properties covered by the Land Use Survey which focuses on designated shopping frontages and also to those located within the town centre boundary as defined as by planning policy.

Copyright Experian GOAD. GOAD Category Report (**column 3)**

*1 - score of below 100 is an under-representation, score of more than 100 an over-representation compared to a hypothetical UK average based of surveys of towns and cities across the UK). This index is for number of outlets.

Although not as diversified as other districts there has nevertheless been some diversification, notably an increase in cafés. The numbers of estate agents has always been fairly high. The latest GOAD category report (2011) suggests that the number of estate agents (score of 141) is well-represented compared to the UK average (score of 100) and with 3 betting offices this type of business is also over-represented.

Please note that parts of the centre have been re-designated as secondary shopping frontage from key shopping frontage in order to encourage diversification. These changes took effect after the 2010 Land Use Survey and therefore data in the following table will reflect this.

There have also been two applications for change of use in parts of the centre which has been re-designated as secondary shopping frontage. One is yet to be determined (23 High Street), and the other was refused due to lack of information submitted with the planning application (change of use to children's play area). This shows interest in the centre for new businesses.

Table 84: Diversity of uses in Whitton town centre

Planning policy designation*1	Use Class	2000	2001	2002	2004	2006	2008	2010	2011	2012	2000	2001	2002	2004	2006	2008	2010	2011	2012	Town centre average 2012
		number of uses									percentages									
KEY	**A1**	59	54	55	56	51	48	50	43	43	79.7	73	74.3	74.7	70.8	69.6	72.5	74.1	74.1	69.3
	A2	3	3	3	3	4	4	4	2	2	4.1	4.1	4.1	4.0	5.6	5.8	5.8	3.4	3.4	7.6
	A3/A4/A5*2	6	7	7	9	10	10	10	6	6	8.1	9.5	9.5	12	13.9	14.5	14.5	10.3	10.3	13.4
	Other	1	1	1	1	1	1	1	1	1	1.4	1.4	1.4	1.3	1.4	1.4	1.4	1.7	1.7	2.4
	Vacant	5	9	8	6	6	6	4	6	6	6.8	12.2	10.8	8.0	8.3	8.7	5.8	10.3	10.3	6.5
	Total	**74**	**74**	**74**	**75**	**72**	**69**	**69**	**58**	**58**										
SECONDARY	**A1**	21	19	18	20	21	16	14	25	25	55.3	50	47.4	52.6	53.8	41.0	37.8	51.0	50.0	51.5
	A2	10	11	13	12	11	9	7	8	8	26.3	28.9	34.2	31.6	28.2	23.1	18.9	16.3	16.0	10.5
	A3/A4/A5	3	3	3	3	3	3	3	7	8	7.9	7.9	7.9	7.9	7.7	7.7	8.1	14.3	16.0	20.7
	Other	1	1	1	1	1	1	3	4	4	2.6	2.6	2.6	2.6	2.6	2.6	8.1	8.2	8.0	9.0
	Vacant	3	4	3	2	3	10	10	5	5	7.9	10.5	7.9	5.3	7.7	25.6	27.0	10.2	10.0	9.2
	Total	**38**	**38**	**38**	**38**	**39**	**39**	**37**	**49**	**50**										
NON-DESIGNATED	**A1**	6	7	7	7	9	8	6	6	6	60	28	29.2	29.2	36	33.3	21.4	21.4	23.1	33.7
	A2	4	5	6	6	3	4	5	5	4	40	20	25	25.0	12	16.7	17.9	17.9	15.4	6.7
	A3/A4/A5	0	4	4	**4**	4	4	5	5	5	0	16	16.7	16.7	16	16.7	17.9	17.9	19.2	26.4
	Other	0	5	5	7	8	8	10	10	8	0	20	20.8	29.2	32	33.3	35.7	35.7	30.8	23.8
	Vacant	0	4	2	0	1	0	2	2	3	0	16	8.3	0.0	4	0.0	7.1	7.1	11.5	8.3
	Total	**10**	**25**	**24**	**24**	**25**	**24**	**28**	**28**	**26**										
TOTAL FRONTAGE	**A1**	86	80	80	83	81	72	70	74	74	70.5	58.4	58.8	60.6	59.6	54.5	52.2	54.8	55.2	57.5
	A2	17	19	22	21	18	17	16	15	14	13.9	13.9	16.2	15.3	13.2	12.9	11.9	11.1	10.4	8.5
	A3/A4/A5	9	14	14	16	17	17	18	18	19	7.4	10.2	10.3	11.7	12.5	12.9	13.4	13.3	14.2	18.0
	Other	2	7	7	9	10	10	14	15	13	1.6	5.1	5.1	6.6	7.4	7.6	10.4	11.1	9.7	8.0
	Vacant	8	17	13	8	10	16	16	13	14	6.6	12.4	9.6	5.8	7.4	12.1	11.9	9.6	10.4	7.7
	Total	122	137	136	137	136	132	134	135	134										
TOTAL DESIGNATED FRONTAGE	A1	80	73	73	76	72	64	64	68	68	71.4	65.2	65.2	67.3	64.9	59.3	60.4	63.6	63.0	61.7
	A2	13	14	16	15	15	13	11	10	10	11.6	12.5	14.3	13.3	13.5	12.0	10.4	9.3	9.3	8.8
	A3/A4/A5	9	10	10	12	13	13	13	13	14	8	8.9	8.9	10.6	11.7	12.0	12.3	12.1	13.0	16.5
	Other	2	2	2	2	2	2	4	5	5	1.8	1.8	1.8	1.8	1.8	1.9	3.8	4.7	4.6	**5.2**
	Vacant	8	13	11	8	9	16	14	11	11	7.1	11.6	9.8	7.1	8.1	14.8	13.2	10.3	10.2	**7.6**
	Total	112	112	112	113	111	108	106	107	108										

source: LBRuT Main Town Centre Land Use Surveys undertaken in Summer. Source: LBRuT monitoring. Produced by Planning Policy Section. See Appendix 1 for details.
Notes: *1 – Calculations for the Land Use Survey uses shopping frontage designations from the adopted UDP up to and including 2010 and thereafter DMDPD designations. **There have been changes in the centre, in the form of the redesignation of properties from key to secondary frontage at the top and bottom of the High Street. See LDF DMDPD for details.**

Charity shops

See Table 5 for borough comparison. Whitton had 8 charity shops in July 2012, which is 1 in ten of all shops in the centre. This proportion is the highest of any of the 5 larger centres in the borough, and bearing in mind the size of the centre is very high compared to the UK average (GOAD score of 309, where the UK average is 100). It includes two branches of Fara and also local as well as national charities. The predominance of charity shops could indicate a lack of demand for premises, although there may be a preference for locating charity shops in more affluent areas and therefore the picture is not quite as clear cut. Recent investment in the centre by in particular Lidl and potentially Sainsburys coupled with environmental improvements implemented and currently underway are likely to have a positive impact on the centre.

6.1b: Comparing Whitton town centre to the UK: which sectors which are well-represented & which under-represented?

Table 85: Sectoral comparison with UK average (floorspace and outlets)

	2005				2011				
	outlets		floorspace		outlets		floorspace		
	number	UK index	amount ft2	UK index	number	UK index	amount ft2	UK index	floorspace converted to m2
comparison retail (non-food shopping)	43	96	50,100	97	34	82	42,800	88	3976
convenience retail (food shopping including newsagents, shoe repairs, markets)	14	63	24,400	63	9	91	19,500	103	1812
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	22	149	14,400	162	29	174	19,000	201	1765
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	15	63	13,000	47	18	66	17,700	59	1644
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	17	124	20,100	172	14	103	15,500	140	1440
Vacant	7	65	5,400	61	20	133	18,000	135	1672
Total	118		127,400		124		132,500		12310

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Notes: Index of 100 = UK average, less than 100 indicates fewer multiples in terms of percentage than the average
Total may not sum due to rounding.

Experian surveyed most of the larger town centres across the UK and thus we can compare an individual centre's composition (the types of businesses in the centre) with a hypothetical UK average town centre. This data reveals a pattern which is in line with the Council's land use information presented above. The amount of food shopping floorspace is similar to the UK average, although the number of outlets is slightly below it. Again, this reflects the centre's local role. The latest GOAD category report uses survey data prior to the opening of Lidl in the former Co-op site and thus food shopping provision, and specifically supermarket provision which has below average representation, especially with regard to floorspace, has further increased and choice improved.

Whitton is well-provided for in terms of retail services which includes health & beauty and opticians. Leisure services are significantly under-represented (cafes and to a lesser extent take-aways make up most of its food and drink offer), although within this sector betting offices and cafes are well-represented.

Compared to the UK average Whitton had higher number of vacant units and a larger proportion of vacant floorspace.

The detailed GOAD data are particularly useful if we wish to determine whether there are potential gaps in provision (under-representation) which could be targeted for inward investment should there be scope to do so.

Data are available for outlets and floorspace i.e. we can compare the numbers of businesses in centre in a particular centre to the UK average, and also the amount of floorspace in that sector. To get a full picture of where under-representation might indicate a gap in provision, we must consider both together, as for example there be fewer outlets in a sector than the UK average, but the floorspace is greater because the size of the outlet/s is relatively large.

Smaller centres will have a more limited role in terms of their role and function, and thus fewer shops with a more limited variety than for example Richmond town centre.

Table 86: Under-represented sectors in Whitton

	Sector
food retail	**types of shops with no outlets in Whitton:**
	fishmongers, greengrocers, permanent market, off licence, shoe repairs *Butchers (incorrect Ellis butcher), newsagents (incorrect unless classified under CTN),*
	types of shops under-represented compared to UK average:
	bakers & confectioners (45) - however, the floorspace figure of 134 indicates provision greater than the average supermarkets***1** (91) In terms of floorspace, the score drops to 45 - a relatively small Tesco store at the time.
non-food	**types of shops with no outlets in Whitton:**
	antique shops, art, booksellers, carpets, catalogue showrooms, children & infants wear, crafts, gifts etc, department/variety store, DIY, fitted furniture, gardens etc, ladies & means wear, ladies accessories, leather & travel, mens accessories, music, video, office supplies, photographic, secondhand goods (not charity shops), sports, telephones, textiles, toys etc
	types of shops under-represented compared to UK average:
	2 sectors are only slightly under-represented cards (96), and toiletries etc (89). The latter is however, well-represented in terms of the size of units in this sector, and therefore would not suggest a clear market gap. Others less well-represented are: clothing general (69), electrical etc (56) - floorspace score is higher, footwear (67), jewellery etc (45)
retail service	There may also be scope for other businesses in the retail service sector including photo processing, photography, repairs of various types of goods including clothing, TV, vehicles.
financial & business services	Although well-provided for in terms of estate agents, building supplies, employment agencies & printing services, Whitton financial and legal services are not well-represented in the borough.
leisure	See earlier table for comparison with other centres. According to the data Whitton has a limited late night offer with no wine bars, clubs, cinemas, theatres. Even pubs and restaurants are under-represented if we consider the amount of floorspace occupied by these uses. There are no hotels or sports and leisure facilities. Are these provided outside the town centre?? It is however well-represented in terms of cafes and betting offices.

Data are for the immediate town centre as defined by Experian. They are the latest available. However, businesses will have opened and closed since surveyed.

Figure in brackets is the score comparing Whitton to the UK hypothetical town centre, in terms of outlets (not floorspace). To get a full picture of where under-representation might indicate a gap in provision, the amount of floorspace in that sector must also be considered and where worthy of note is referred to in the text. A score below 100 indicates under-representation. The lower the score, the further from the average.

Source: GOAD Category Report (2011). © copyright Experian GOAD.

Comparing the situation with the 2005 dataset there is a discernible loss of food retailers, as the centre no longer has a fishmonger, greengrocer, butcher or newsagent. The number of food shops has fallen from 14 to 9 between 2005 and 2011.

The centre has also lost some of its comparison goods diversity since 2005. GOAD suggest that in 2005 there were 43 comparison goods retail outlets. This figure dropped significantly to 34 in 2011. The data suggest the centre has lost retailers in the following sectors: carpets (Tribes), clothing general (Lakes Clothing), children & infants (Just 4 Kids), ladies wear & accessories (Alicia Liberty, Lakes Woman), men's accessories, sports (Street Quarter), toys (Papillion), electrical & durable, textiles (Curtain Call). There are new shops in the centre including a cycle shop, furniture and hardware shops, but overall the pattern is of a reduction in non-food shopping, primarily independent retailers.

The vacancy rate has increased significantly in the centre since the earlier survey was undertaken (GOAD Category Report), whereas previously vacancies were well-below the national average in terms of both number of outlets and floorspace, the more recent GOAD data shows a more negative picture with both Indices above the UK average. However, this survey was undertaken prior to the opening of Lidl and the Council's own more up-to-date Land Use Survey (2012 reveals a more positive picture.

6.1 c) Multiple representation in Whitton town centre

Table 87: Sectoral comparison with the UK

	2005				2011				
	number of outlets	UK index ***2**	amount of floorspace ft2	UK index	number of outlets	UK index	amount of floorspace ft2	UK index	floorspace converted to m2***3**
total			41,900		29		46,800		**4350**
comparison retail (non-food shopping)	n/a	n/a	7,200	34	10	79	13,800	61	1280
convenience retail (food shopping including newsagents, shoe repairs, markets)	n/a	n/a	15,800	191	3	95	13,700	133	1270
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	n/a	n/a	12,800	2,846 ***4**	3	103	2,200	94	
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	n/a	n/a	6,100	79	6	106	7,500	103	700
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	n/a	n/a	0	0	7	152	9,600	229	890
% operated by a multiple***1**			32.9		23.4		35.3		
% of **retail sector*3** operated by a multiple			30.9		30.2		44.1		

Source © copyright Experian GOAD

Notes: *1- A multiple has 9 or more outlets. All multiples included retail, retail service, leisure service & financial and business services
*2 - It is the difference between a percentage figure for the centre and the GB average.. Index of 100 = UK average, less than 100 indicates fewer multiples in terms of percentage than the average
*3 - comparison retail and convenience retail.
*4 - The figure for retail services has a high index because the majority of businesses operating in this sector in Whitton are multiples and overall numbers are very small and in fact restricted in 2005 and thus the Index should be considered unreliable.

See Table 10 for borough comparison. According to Experian GOAD there are 29 multiple outlets in Whitton (2011), which amounts to c.4,300m2 of floorspace. There are 13 multiple retailers. Whitton has relatively few multiples in the non-food retail sector. The proportion of food shops which are multiples is nearer to the UK average.

The number of multiple outlets in Whitton is significantly lower than in the other districts and more on a par with Barnes.

National comparators: Benchmarking

Venuescore

The Javelin Group produces an index which ranks over 2,000 UK shopping venues based on their retail offer. Whitton as a smaller centre with a more local role is ranked 1,317, although it has also improved on its 2006 rank of 1,715. For comparison, Twickenham is ranked 456 (up from 737 in 2006).

6.2 Vacancy rates

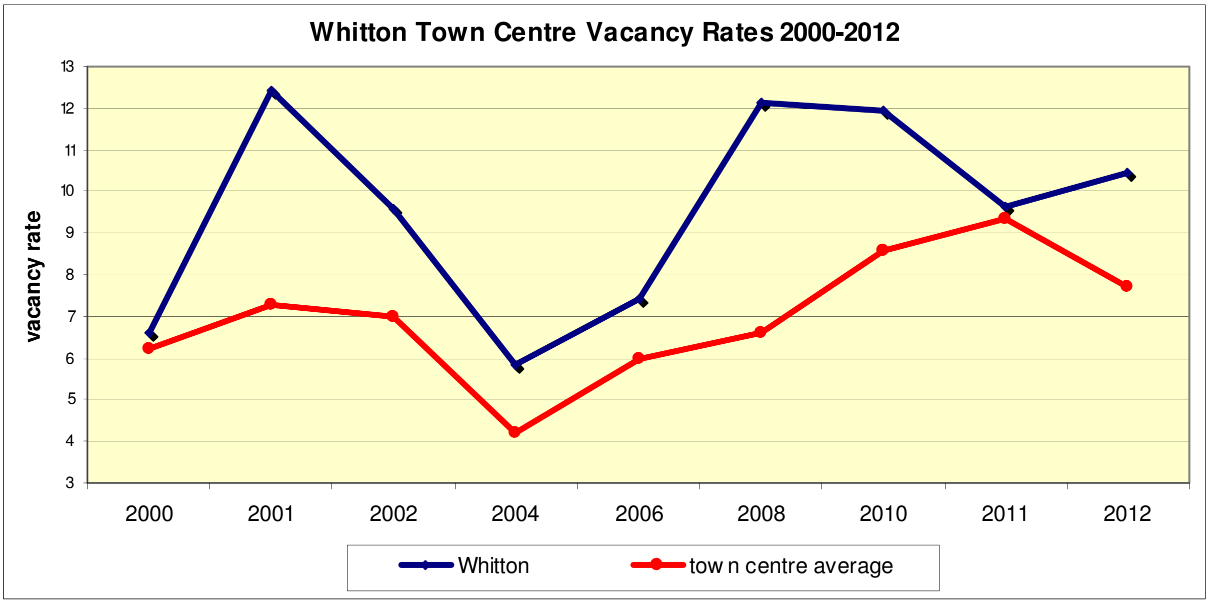
Table 88: Vacancy rates in Whitton (all frontages)

	Vacant uses as percentage of all uses								
	2000	2001	2002	2004	2006	2008	2010	2011	2012
Whitton	6.6	12.4	9.6	5.8	7.4	12.1	11.9	9.6	10.4

Source: Town Centre Land Use Surveys undertaken in Summer. Produced by Planning Policy Section

See Table 13 for borough comparison. With a vacancy rate of 10.4%, Whitton has a higher rate than any other district centre and with the exception of Teddington (increase from a low base), is the only centre where the vacancy rate increased from the previous year, albeit marginally.

The long-term trend shows a similar pattern as that for all town centres in the borough with rates dropping by 2004 and rising again thereafter. Perhaps significantly the latest figure is not as high as it was in previous years throughout the last decade or so.



Long-term vacancies
In July 2012 there were only 3 units which were considered to be long-term vacants, i.e. had been vacant for 2 years or more. This is only 2.2% of units in the centre as a whole, which is relatively insignificant. Two of which were vacant A2 units.

UK comparisons
Estimates produced by Experian GOAD & the Local Data Company suggest a UK vacancy rate of c.14%. Although the methodology and date of survey does not correspond exactly with the Council's more frequent surveys it indicates that vacancy rates in the centre are just below the national average.

6.3 Prime Retail Rents
Statistics on Zone A rents (£ per ft2) are not produced by Colliers International for Whitton. Local agents have suggested that Whitton was struggling although Lidl has recently opened and the 2015 Rugby World Cup will be very beneficial to the town centre.

6.4 Floorspace
2011 Experian GOAD floorspace estimates by sector are included in Table 20. Total estimates amount to 12,300 m2 of floorspace in the town centre of which c.4,000 m2 is comparison floorspace and 1,800m2 is convenience (food) floorspace. It has significantly less floorspace than the other district centres and less floorspace than Barnes local centre. Compared to Barnes it has more food shopping floorspace, but less non-food floorspace. Whitton has a food shopping role for local residents, despite out of centre provision in close proximity.

6.5 Employment in town centres


Source: NOMIS Ward Labour Market Profiles.

Workforce data have not yet been released for the 2011 Census. According to the 2001 Census approximately 3,900 people make up the daytime population in Whitton which is relatively small. Whitton ward includes the majority of the town centre, albeit that the boundaries extend further. The daytime population comprises those who work in the area and those who live in the area and do not work.

Table 89: Daytime populations in wards which bestfit with town centre boundaries.

Town centre (best fit with ward)	Number of people
Richmond	12,200
Twickenham	8,700
Teddington	8,300
East Sheen	5,300
Whitton	3,900
Barnes	5,000

Source 2001 Census. © Crown Copyright

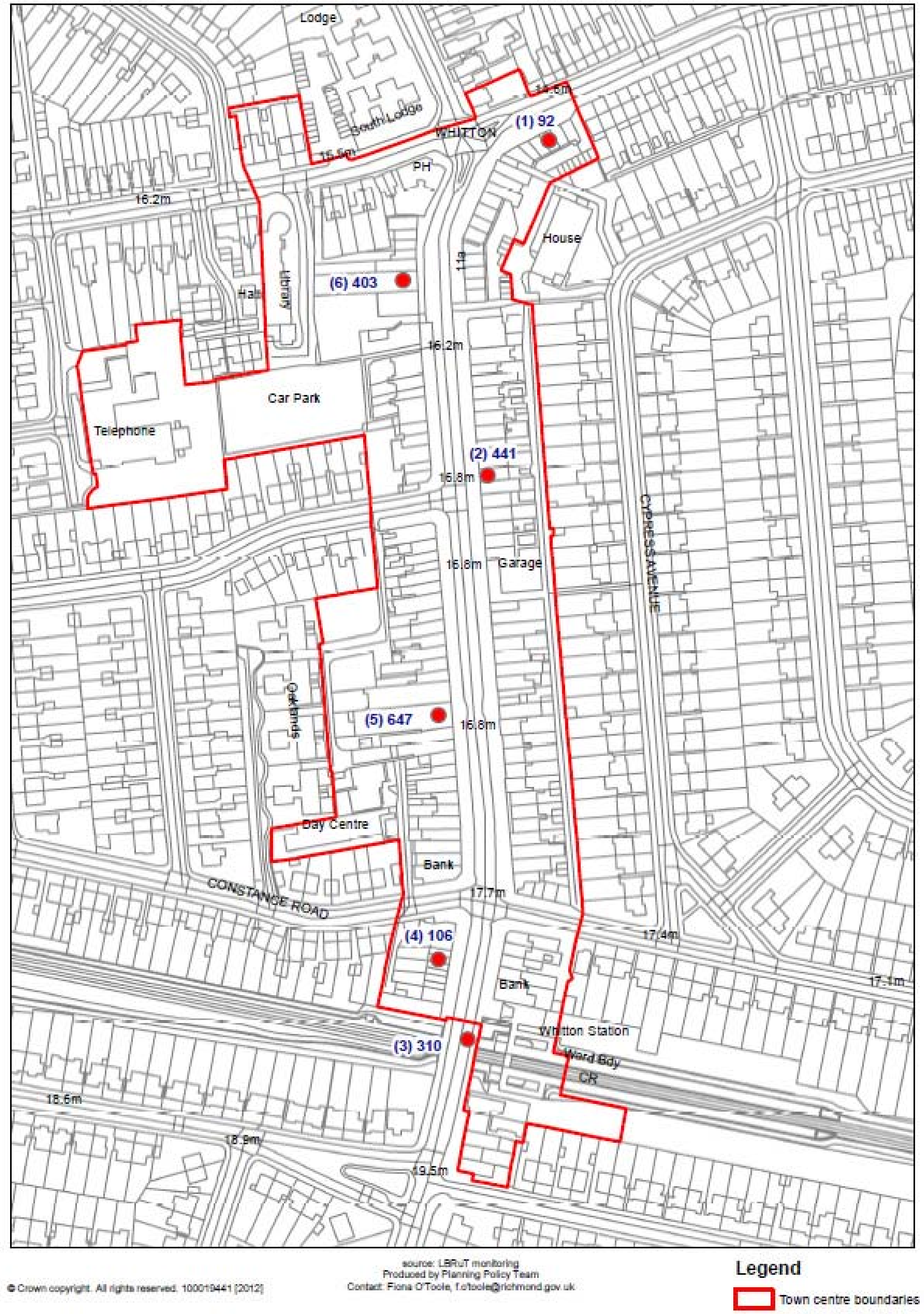
6.6 Footfall- pedestrian counts

Pedestrian flows counts were undertaken at 6 monitoring sites across the centre in October 2012, updating counts undertaken in 1997, 2000 and 2006. 9 minute counts were taken at each site which were then factored up to represent an estimated hourly rate. The map below shows the location of the sites and identifies the estimated count at the lunchtime peak. The Table on the following page presents the data in full.

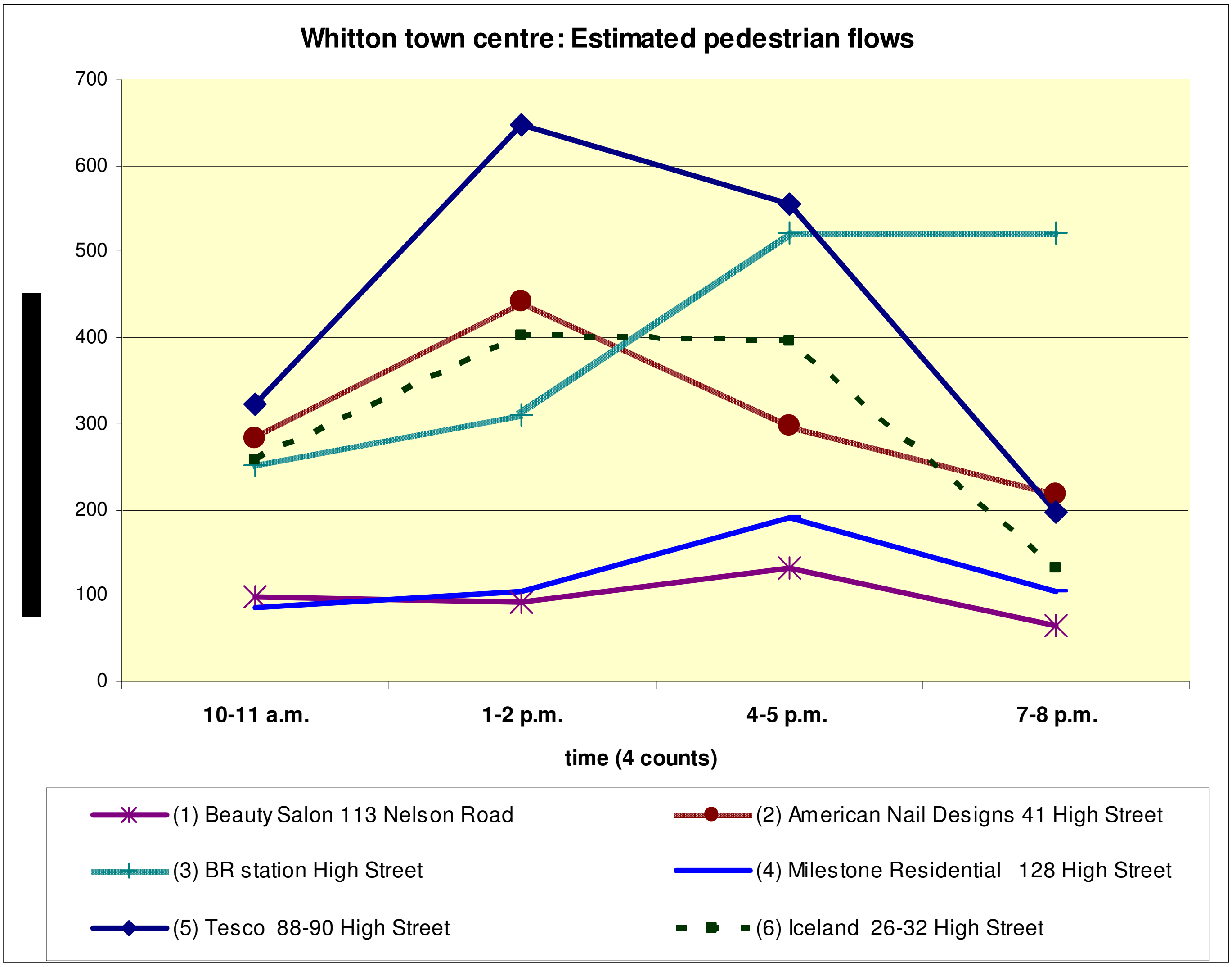
As with other centres, the highest footfall is to be found outside of the centre's supermarket, and this is pretty much consistent across the years. There is a secondary peak at the BR station site, which is particularly noticeable in the evening when footfall in the centre falls significantly. Overall footfall is down by approximately 20 % comparing the 1997 lunchtime peak to the most recent counts in 2012. However, more recently the figures are not significantly different. If we take an average figure for all the monitoring points in 2006 and 2012 as a general guide, the figures are very similar. In fact the average footfall appears to have increased in the evening since 2006, (albeit it that the 2006 data for the station site is particularly low which may simply reflect train arrivals/ departures).

There has been an increase in pedestrian numbers at the two sites nearest the Lidl store compared with 2006 and a noticeable decrease in footfall at the Tesco site. The store had been open for approximately a year when the footfall survey was undertaken.

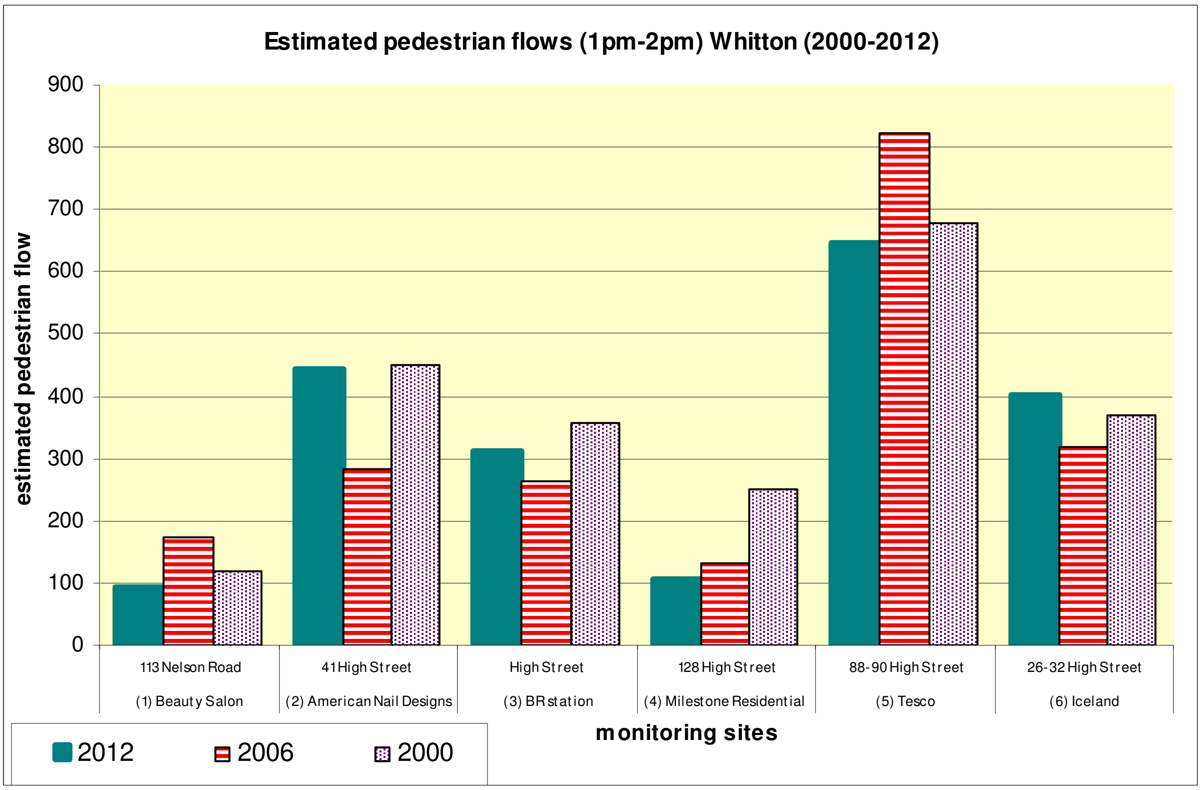
Pedestrian flowcounts in Whitton (estimated hourly flows 1 to 2 pm) Sept 2012



Source: LBRUT Monitoring. Planning Policy & Research



Source: LBRUT Pedestrian flowcount monitoring. Produced by Planning Policy Section



Source: LBRuT Pedestrian flowcount monitoring. Produced by Planning Policy Section

Table 90: Estimated pedestrian flowcounts in Whitton town centre 1997, 2000, 2006 & 2012

		2012				2006				2000				1997			
Premises Name	Address	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.
(1) Beauty Salon	113 Nelson Road	99	92	132	66	186	174	126	60	106	119	112	99	192	144	258	108
(2) American Nail Designs	41 High Street	284	442	297	218	252	282	288	132	238	449	317	205	306	210	324	126
(3) BR station	High Street	251	310	521	**521**	252	264	558	168	284	356	330	442	348	276	234	180
(4) Milestone Residential	128 High Street	**86**	106	191	106	174	132	108	90	99	251	211	132	174	108	204	90
(5) Tesco	88-90 High Street	323	647	554	198	720	822	630	288	997	680	653	455	468	552	504	138
(6) Iceland	26-32 High Street	257	403	396	132	306	318	288	102	436	370	469	218	192	252	294	72

Source LBRuT Planning Policy Team. Survey date 2012: Fri 21st September

Weather conditions 2012: dry

Notes - Figures are extrapolated from 9 minute counts.

Red indicates the highest counts at each session, and blue the lowest.

6.7 Accessibility & parking

Table 91: Bus Routes – Whitton district centre

Bus routes serving the local centre are as follows:

	number of buses per hour							**List of key centres passed through**
	Monday to Friday			Saturday		Sunday		
Service Number	Peak	Off peak	Eves	Day	Eves	Day	Eves	
H22	5	5	3	5	3	3	3	Hounslow, Whitton, Twickenham, Richmond.
R62	1	1	0	1	0	0	0	Twickenham, Whitton
110	3	3	2	3	2	2	2	Twickenham, Hounslow
281	8	8	5	8	5	5	5	Kingston, Teddington, Twickenham, Whitton, Hounslow
481	1	1	1	1	1 (limited)	-	-	Kingston, Teddington, Whitton, West Middlesex Hospital

Source: TfL website

Table 92: Train Routes – Whitton town centre

	Trains per hour
from Windsor & Eton Riverside	2
London Waterloo loop (via Hounslow)	2
Total number of trains and underground services arriving at Whitton	***8***

Source LBRuT Transport

Table 93: Whitton town centre car park capacity

Nelson Road	Operated by Council. Max stay 3 hours during operational hours	64 cars, 4 disabled, 1 motorcycle

Source: LBRUT Transport Section, and other

Full details, including pricing are available at http://www.richmond.gov.uk/home/transport_and_streets/parking/car_parks/content-parking_whitton_area_car_parks.htm.

6.8 Customer and resident's views

The Council's All in One Consultation was undertaken in November 2010 and followed up with a series of local events. The full results for this area including Heathfield can be viewed on the Council's website using the following link: http://www.richmond.gov.uk/whittona4_web_.pdf.

Key results are:

The things that were most important in making it a good place to live included:

- 49% - Local parks and open spaces
- 47% - Shopping in your local high street
- 40% - Level of crime and anti-social behaviour
- 28% - Public Transport
- 26% - Library services

The things you identified that most needed improving in your area, included:

- 46% - Shopping in your local high street
- 35% - Condition of pavements
- 23% - Traffic and/or levels of congestion
- 22% - Condition of roads

- 22% - Support for local businesses

There were 1135 responses in this area.

6.9 Anti-social behaviour reporting and occurrence of crime

Anti Social Behaviour (ASB) levels

Data on Anti Social Behaviour levels reported to the Council for the period 2011-12 are available for the main town centre wards. ASB is gathered every month from three council databases which makes amalgamating data more difficult. The data provided covers 80% of the ASB total for the year.

Key facts for the borough as a whole are presented in the relevant section for Richmond town centre. Much of the reporting relates to littering, and usually occurs after 8pm on weekends. ASB reporting is based on perception and is therefore subjective. Most reports are concerned with "Environmental ASB", relating to a physical location rather than a person. Reports concerning the later are usually addressed directly to the police. "Environmental ASB" includes littering and fly tipping. However one-fifth of calls related to Noise, which is nine times out of ten an issue with human interaction and tolerance levels.

Of the three main ASB categories[49], barely 1% of council ASB calls/reports fall under the most serious category of Level One (Personal). Around 14% of calls fall under Level Two (Nuisance) and 85% of calls/reports fall under the least serious category Level Three (Environmental).

Table 94: ASB Reporting 2011/12

Centre	Number of ASB reports in centre	Environs*1	% ASB taking place in centre	ASB Level
Barnes	42	182	22%	Low
Whitton	42	137	31%	Low
East Sheen	127	288	44%	Medium
Teddington	62	240	26%	Low
Twickenham	219	390	59%	Medium-High
Richmond	276	471	59%	Medium-High

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Notes *1 = covers the area around the main town centres, which is not the entire ward, as defined by the Community Safety Data Analyst

Whitton has very low numbers of ASB reporting, being more on a par with Barnes than with other town centres especially Twickenham and Richmond which have well-developed evening economies. A third of reporting occurs in the centre itself compared to the surrounding areas, and is therefore less concentrated in the town centre.

All levels of ASB reported to the Council are quoted are relative to the borough and not pan-London. If these town centres were compared to local town centres such as Kingston, Hounslow or Hammersmith, they would all be classified as Low.

[49] Personal : 'Personal' is designed to identify ASB incidents that the caller, call-handler or anyone else perceives as either deliberately targeted at an individual or group or having an impact on an individual or group rather than the community at large.
Nuisance: 'Nuisance' captures those incidents where an act, condition, thing or person causes trouble, annoyance, inconvenience, offence or suffering to the local community in general rather than to individual victims
Environmental: 'Environmental' deals with the interface between people and places. It includes incidents where individuals and groups have an impact on their surroundings including natural, built and social environments.

Map of ASB calls/ incidents in Whitton town centre area 2011/12

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Notes
These maps are a pictorial illustration and do not show all the ASB recorded in the total figure. Ward level identification has been used when mapping co-ordinates are not available. The green circle indicates the ASB hotspot.

Key findings:

- There were 42 reports of ASB in Whitton town centre during 2011-12, which is an average of only 4 calls/reports per month.
- The main type of ASB reported was litter. The green circle designates the ASB "hotspot" as to the south of the High Street.
- There were 137 ASB reports in the wider Whitton area during 2011-12, therefore the town centre contributed to only 31% of the total.
- Whitton Town Centre has low levels of ASB reporting, having, along with Barnes, the joint lowest figures of the centres compared.

7.10 (b)ii Crime levels

Data are not released for Whitton as crime levels are too low.

6.10 State of the town centre: environmental quality

Overall, Whitton town centre has no Public Open Spaces or other spaces designated for their local value/importance; the majority of the town centre is within an Area poorly provided with Public Open Space. In comparison to other town centres, there are no historic assets in Whitton (except 1 Building of Townscape Merit) and no area of Whitton falls within a Conservation Area. There is one air quality analyser within the designated town centre boundary, which shows that the levels have exceeded the air quality objective.

The environmental quality of Whitton town centre has been assessed by dividing the centre into three areas: (1) Station surroundings, (2) High Street and (3) Telephone exchange, car park and library surroundings. See Appendix 4 for a map of the areas that have been surveyed.

The area at and surrounding **Whitton station (Area 1)** is generally of poor environmental and public realm quality, partly due to the poor quality design of the station building but also due to the constrained road layout and railway tracks underneath the road. There are hardly any street trees or other vegetation, but there is limited scope for additional planting. There are some problems associated with litter and the area has a slightly cluttered feel (green boxes, signs, adverts etc.). The environment for pedestrians is generally good, but the pavements as well as the roads are patchy/partly damaged and therefore in need of repair.

Whitton High Street (Area 2) is overall considered to be pedestrian-friendly due to the designated crossings and wide pavements. However, the surfaces of both pavements and roads are somewhat damaged and in need of repair. With the exception of some litter near bins, there are no problems in relation to fly-posting, graffiti and fly-tipping. In general, the High Street can be fairly impacted by traffic, and coupled with some poor quality design buildings and lack of public open spaces, the environmental and public realm quality is considered to be moderate to poor. There may be some scope for more street furniture in terms of new benches. Of note are the recently installed new lighting columns, which add to the aesthetics of the area. The High Street is subject to a major street scene improvement project, which will include the repaving of footways, forecourts, street furniture enhancement and tree planting.

The areas off Whitton High Street, which include the **telephone exchange site, the car park and the library (Area 3)**, differ largely from the High Street. The back areas, such as the service areas of the shops and the telephone exchange site, feel unpleasant. There are some significant litter problems, some fly-posting/ graffiti as well as dumped waste in the back roads. There is some soft landscaping at the car park and library. With the exception of the car park, the remaining surfacing is in need of repair. Overall, due the very poor quality of some of the rear buildings, including the run-down toilet facilities and litter problems, the public realm and environmental quality of this part of the town is very poor.

See Appendix 3 for the detailed results of the desk-based assessment, including analysis of open spaces, historic assets, air quality etc.

The individual survey sheets for the assessed areas can be found in Appendix 5.

6.11 Implementation of proposal sites

Table 95: Implementation of UDP Proposal Sites in Whitton

Proposal site		Description	Progress in 2007/08	Progress in 2008/09	Progress in 2009/10	Progress in 2010/11	Progress in 2011/12
W10	High Street	Environmental improvements	not implemented	not implemented	not implemented	not implemented	Begun. Likely to finish in 2014
W14	Whitton Station	interchange improvements	not implemented	not implemented	not implemented	not implemented	Likely 2013

Source: Extract from Appendix of Annual Monitoring Report 2011/12

There are only 2 adopted proposal sites which have been formally “saved” from the UDP. One (environmental improvements in the High Street) is underway and the other (Station) is considered likely to be started this year. It should be noted that work has begun on the Site Allocations Development Planning Document which might yield further sites in Whitton.

6.12 Completions and commitments

Table 96: A1 Use Class (shop) completions within Whitton town centre boundary 1/10/2007 to 1/4/2012

			New completed floorspace 1*			Net additional floorspace 2* (taking account of losses)		
application ref	Address	summary of proposal	new completed floorspace (m2) (gross external)	new gross internal floorspace m2 3* (gross internal)	of which net tradable floorspace m2 4* (gross internal)	net additional floorspace (gross external)	net additional floorspace (gross internal)	of which net tradable floorspace
08/2818	102 High Street, Whitton	Change of use from 1st floor store room to 1 bedroom flat.				-27	-26.0	0.0
04/2885	97-99 High Street, Whitton	Proposed ground floor front and rear extensions to shop	54	52.0	**41.6**	54	52.0	**41.6**
10/3424	38 - 48 High Street (Lidl)	Conversion of the ground floor of the existing building from 6 no. retail units to 1 no. retail unit incorporating a single storey rear extension, the installation of a new shopfront, …….	385	370.6	**296.5**	385	370.6	**296.5**
11/1211/COU	113 Nelson Road, Twickenham	Change of use of vacant shop premises (A1 Retail) to Beauty Salon (Sui Generic).				-42	-40.4	**-32.3**
11/1083	92 High Street	Change of use from A1 to mixed A1/A3 use.		0.0	0.0	-60	-57.8	-11
		TOTAL	**0**	**0**	**477**	**0**	**0**	**477**

Source : LBRuT Decisions Analysis system. Produced by Planning Policy Section.

Notes:

1* - New floorspace completions plus gains from change of use and conversions
2* - Net additional floorspace - takes account of losses and gains
3* Difference between gross external and gross internal floorspace defined by DCLG as 3.75%
4* Net tradable floorspace is the amount of gross internal floorspace which is trading floorspace i.e. sales space which customers have access to. Where retail sales area of either the existing or proposed development, or both is not known a proxy is calculated using a 80/20 ratio **(identified in bold)**

Clearly the most significant change to the centre has been the opening of Lidl in the former Co-op site which has been long-vacant and is therefore considered as additional retail for the purposes of this exercise. This redevelopment along with the minor extension of two other A1 uses in the High Street has resulted in a marginal increase in retail floorspace in Whitton. In addition to this, there is a further significant permission at 53-55 High Street in the pipeline. The convenience retail offer has been significantly improved, with the expectation of a further increase.

Commitments

Table 97: Commitments in pipeline (additional retail) in Whitton town centre (outstanding at Apr 2012)

				Additional retail in pipeline		
application ref	decision date	address	Proposal	approx retail sales area m2	Ancillary retail m2	total m2
08/1571/FUL	08-Jun-10	106A High Street Whitton Middlesex TW2 7LN	Mansard roof and conversion of buildings 1st and 2nd floors to 3 one bedroom flats, part single, part two storey rear extension to provide new retail floor space at ground floor and one bedroom flat at first floor.			17
11/3622/FUL	22-Mar-12	53-55 High Street Whitton TW2 7LB	Demolition of all existing buildings including car showroom with residential flats above and the erection of a three-storey building with class A1 retail use on the ground floor and 1 no. studio flat, 3 no. 1 bedroom flats and 5 no. 2 bedroom flats on the			460
			TOTAL	**0**	**0**	**477**

Source: LBRuT Decisions Analysis system. Produced by Planning Policy Section **.**
Notes: Table includes additional space only, not where there is a reduction in retail space.

6.13 Potential for growth & change

The Council commissioned consultants GVA Grimley to produce a retail capacity study forming part of the evidence base for the LDF. Details of this study are presented in section 2.15.

- The **qualitative assessment** for Whitton suggested retailers are small independents serving a local top-up shopping role. The balance of uses in the centre is stable & vacancy rates were in line with national average.

Capacity projections 2006 & 2009

The revised assessment (2009) suggests a pattern which is broadly the same as the earlier assessment. See Table 34 for capacity forecasts for all town centres. For Whitton town centre the revised forecasts suggest **very limited capacity of 226 m2 net for convenience (food) floorspace by 2016, rising marginally to 294 m2 net by 2021**[50]. After this point (2026) capacity arises again to 367m2 net, although such long range forecasts should be treated with caution. For **comparison goods** Whitton also has a limited **estimated capacity of 89m^2 in 2016 rising to 294 net**[51] **by 2021,** and to 535m2 net by 2026.

The net figures can be translated into gross town centre floorspace (including non-sales areas) by applying an appropriate gross to net ratio (65%). The gross figure also includes a further 15% for A3, A4 and A5 uses in the scheme, making a total ratio of c 80/20[52]. **Gross comparison capacity is also forecast as 161 m^2 by 2016 and 532 m^2 by 2021**. Overall, therefore this research suggests a **very limited quantitative need to provide retail floorspace in the town centre which translates as an indicative very modest requirement of 600m2 net by 2017/18 in the adopted Core Strategy (para 6.1.14)**[53]**.**

The Study concludes that in general, proposals coming forward should be directed to the borough's town centres in the first instance. The scale of such development should be considered, as should the implications for existing floorspace and the potential to clawback money leaking from the catchment area. Since a proportion of the capacity arises from out of centre development, and bearing in mind that town centre sites should be considered first, there is potential to support more floorspace than identified in the analysis. It goes on to say that the Council should be proactive in planning for the borough's town centres bearing in mind the potential threat from Westfield shopping centre.

Scope for development

Very limited capacity for new food shopping, although a development coming forward could help to claw back trade lost to out-of-centre provision. Tesco Metro could expand into another unit or perhaps encouragement for a small foodstore. Some limited capacity for comparison goods although unlikely that it could clawback significant amount because of competition from surrounding areas. A large scheme would in any case be inappropriate in scale for the function of the centre. LDF should seek to consolidate & stringent application of policies to protect retailing. LDF could

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[50] Residual expenditure is converted to floorspace using a sales density of £10,000 per m2, a minimum level required by most major food retailers.
[51] Assuming new comparison floorspace achieves a sales density of c. £5,000m2 net.
[52] It does not include leisure floorspace
[53] Subject to testing of site availability at Site Allocations stage

encourage a greater mix of A3 uses beyond the key frontages, but restrict A4 & A5. However, the key frontages in Whitton were in fact reduced to allow for greater diversification.

- As part of the Study a number of sites were assessed in each town centre on the basis of an initial appraisal only and future viability testing was anticipated. The only site considered was the Co-op site which has now been redeveloped.

6.14 Town centre management & economic development

Whitton town centre has been the subject of significant investment since 2011. This includes £361,000 from the Outer London Fund and subsequent ongoing investment from the Council's Uplift Programme.

A core theme in Whitton is the restoration of a 1930s theme, building on key elements of what is one of London's finest surviving examples of 1930s high street development. Period style lamp columns have been installed; many shop fronts enhanced and new street market has been established. Navigation to car parks has been eased with additional signage. A new website and community involvement through art and cultural projects have helped to raise a sense of optimism around the town. The Whitton Business Association has introduced a regular market, which has been well-received.

A further phase of shop front improvements is being rolled out in 2013. Significant investment in pavements, forecourts and parking provision through 2013 will transform Whitton High Street.

Summary

Clearly Whitton is the smallest of the district centres with a food shopping, but relatively limited comparison shopping, role. Food shopping provision is similar to the UK average. Of note is that comparison shopping appears to be on the decline, with numbers of retailers falling across a variety of types of shops in the non-food sector, primarily independents. It has not diversified as fast other similar centres and its food and drink offer is fairly limited, albeit that numbers of cafes have been steadily rising.

Vacancy levels are higher in Whitton than in the other district centres in the borough (although below the national average) and anecdotal information on rents is not especially positive. It has fewer multiples and a higher proportion of charity shops than other district centres.

Pedestrian flow data show that overall figures are similar to counts taken in 2006. There does seem to be some redistribution of the footfall in the centre, affected by the opening of the Lidl store in Nov 2011. However, Tesco remains the site with the highest footfall.

Looking to the future there have been a number of positive developments with the opening of the Lidl store in the former Co-op building which had been underused or vacant for many years. Planning permission has also been given for a retail unit on the former car showroom at 53-55 High Street, which may be occupied by a smaller format supermarket. Although Whitton is not expected to be a major retail centre, these developments could help to retain shopping spend in the area. In addition, the centre has also benefited from recent spending on public realm improvements and there is further investment planned.

7: Barnes local centre

Introduction

Regional context

Barnes is the largest of the local centres in the Council's hierarchy. It is not classified in the Mayor's Town Centre Network. Data for the other local centres in the borough are included in a series of tables set out in Appendix 2.

Village plan for Barnes

The Council has produced a series of Village Plans following extensive consultation through an All-In-Survey. Please use the following link to access the following web pages. http://www.richmond.gov.uk/barnes_area_village_plan.htm

The vision set out in the Village Plan includes the following relating to town centres:

The vision for Barnes is to maintain the character of Barnes as an attractive residential area and use the new Barnes trail to promote it more widely as a tourist destination.

The key features of Barnes are the Green, the pond and surrounding buildings and trees which create an outstanding village atmosphere; Castelnau with its fine houses which provide a dramatic approach to Hammersmith Bridge; and the former Harrods depository now converted into flats.

The River Thames and related towpaths and open spaces are the other defining features of the area. Key open areas include Barnes Common, the Wildlife and Wetlands Trust Centre, Leg O'Mutton reservoir and the Barn Elms Playing Fields.

Barnes High Street and Church Road have a good range of local shops and services and there are also important local shopping areas at White Hart Lane and in Castelnau.

The vision is based on maintaining the character of Barnes as an attractive residential area; ensuring that Barnes High Street and White Hart Lane continue to provide a shopping and service centre for residents and visitors and to give a focus to and improve the North Castelnau shopping area so it provides a more welcoming environment for shoppers. Also to promote Barnes as a tourist destination and ensure the towpath and open spaces are well maintained and enhanced where opportunity arises, for instance in development of the Barnes Trail.

The impact of traffic will be reduced where possible and the open areas within and around the Village will continue to be protected, enhanced and enjoyed.

1174 people who responded to the All in One survey lived in Barnes. Around 95% were satisfied with your area as a place to live.

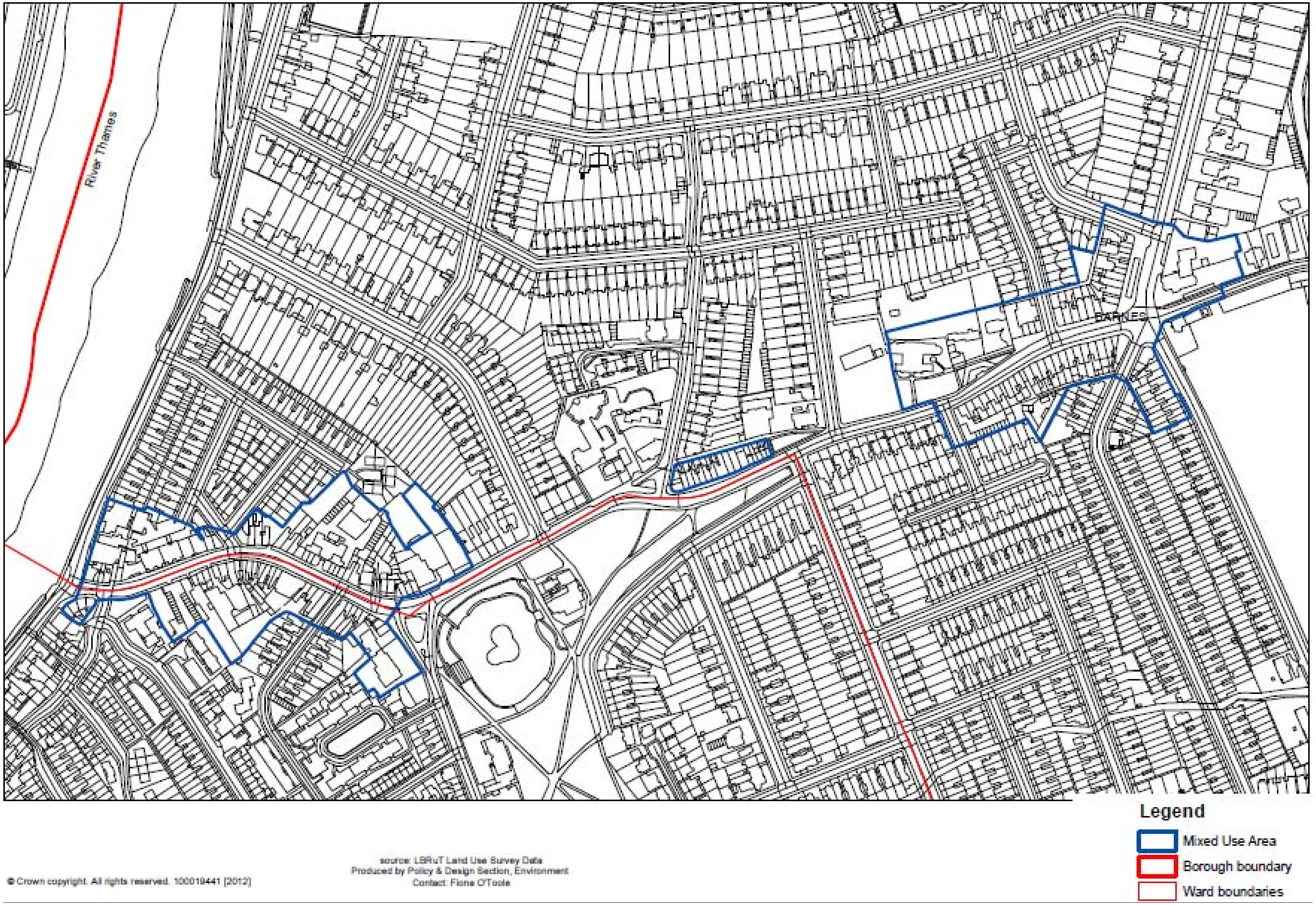
The things that were most important in making it a good place to live included:

- 72% - Local parks and open spaces
- 39% - Level of crime and anti-social behaviour
- **39% - Shopping in your local high street**
- 38% - Public transport
- 18% - Amount of litter and/or cleanliness of streets
- 18% - Waste and/or recycling

The things that most needed improving in your area included:

- 35% - Condition of pavements
- 30% - Traffic and/or levels of congestion
- **26% - Shopping in your local high street**
- 23% - Condition of roads
- 23% - Support for local businesses

Barnes local centre



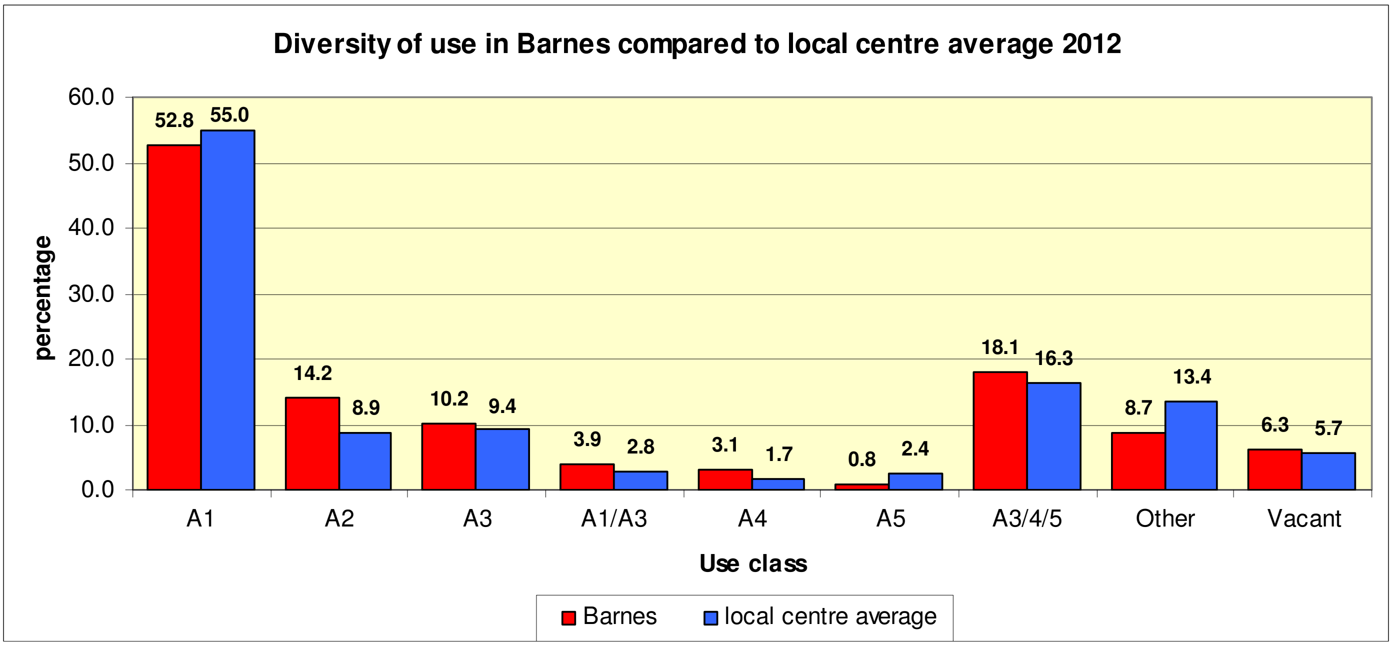
source: LBRuT Land Use Survey Data
Produced by Policy & Design Section, Environment
Contact: Fiona O'Toole

7.1 Diversity of main town centre uses

7.1 a) Mix of uses: business activity

Barnes is compared to other local centres in the Council's hierarchy, local centres being St Margarets, Hampton Hill, Hampton Village, East Twickenham, Kew Gardens and Ham Common. Of these Barnes is the largest with c. 130 outlets, Hampton Hill is a similar size and others considerably smaller (Ham Common with 41 units and Kew Gardens with 51.)

The clear discernible difference is that Barnes has a significantly higher proportion of outlets in A2 (financial) use. Barnes also has a higher proportion of outlets in the food and drink sector. Conversely, the proportion of shops is slightly lower than the average as is the proportion of other uses (including the miscellaneous use class category, office, etc).



Source: Town Centre Land Use Survey 2012. Produced by Planning Policy Team.

The table below shows that over the years the number of shops in the centre as elsewhere, fluctuated over the last decade or so. With 67 A1 outlets in 2012, the level is considerably lower than it has been in the past and is at its lowest over this period. However, numbers also dropped in 2004. There has been some growth in the food and drink sector which has occurred very recently (between surveys in 2011 and 2012). The most significant change is rise in the number of vacant units. For many years the vacancy rate was extremely low. It rose steeply between 2008 and 2010 and has dropped more recently to 6.3% which similar to the local centre average of 5.7%.

Table 98: Mix of businesses: Diversity of uses in Barnes local centre

Planning policy designation*1	Use Class	1999	2000	2001	2002	2004	2006	2008	2010	2012	1999	2000	2001	2002	2004	2006	2008	2010	2012	local centre average 2012
		number of uses									percentages									
KEY	**A1**	60	60	58	60	56	58	58	46	**49**	75.9	75.9	73.4	75.9	70.9	74.4	74.4	58.2	**63.6**	66.8
	A2	7	8	8	8	8	8	8	9	**9**	8.9	10.1	10.1	10.1	10.1	10.3	10.3	11.4	**11.7**	8.0
	A3/A4/A5*2	6	7	7	7	8	8	8	9	**12**	7.6	8.9	8.9	8.9	10.1	10.3	10.3	11.4	**15.6**	16.4
	Other	5	4	4	4	4	1	1	1	**2**	6.3	5.1	5.1	5.1	5.1	1.3	1.3	1.3	**2.6**	4.2
	Vacant	1	0	2	0	3	3	3	14	**5**	1.3	0.0	2.5	0.0	3.8	3.8	3.8	17.7	**6.5**	4.6
	Total	**79**	**79**	**79**	**79**	**79**	**78**	**78**	**79**	**77**										
SECONDARY	**A1**	15	16	13	16	16	17	17	17	**13**	45.5	55.2	46.4	55.2	55.2	58.6	58.6	60.7	**48.1**	53
	A2	7	7	7	7	6	6	6	6	**6**	21.2	24.1	25.0	24.1	20.7	20.7	20.7	21.4	**22.2**	11.5
	A3/A4/A5	4	4	4	4	4	4	4	3	**4**	12.1	13.8	14.3	13.8	13.8	13.8	13.8	10.7	**14.8**	14.5
	Other	7	2	2	2	2	2	2	1	**3**	21.2	6.9	7.1	6.9	6.9	6.9	6.9	3.6	**3.7**	12.0
	Vacant	0	0	2	0	1	0	0	1	**1**	0.0	0.0	7.1	0.0	3.4	0.0	0.0	3.6	**11.1**	7.0
	Total	**33**	**29**	**28**	**29**	**29**	**29**	**29**	**28**	**27**										
NON-DESIGNATED	**A1**	5	4	3	4	4	6	6	5	**5**	27.8	23.5	17.6	23.5	23.5	27.3	27.3	21.7	**21.7**	37.2
	A2	1	1	1	1	1	2	2	2	**3**	5.6	5.9	5.9	5.9	5.9	9.1	9.1	8.7	**13.0**	6.6
	A3/A4/A5	7	7	7	7	**7**	7	7	7	**7**	38.9	41.2	41.2	41.2	41.2	31.8	31.8	30.4	**30.4**	18.2
	Other	4	5	5	5	5	7	7	8	**8**	22.2	29.4	29.4	29.4	29.4	31.8	31.8	34.8	**34.8**	31.4
	Vacant	1	0	1	0	0	0	0	1	**0**	5.6	0.0	5.9	0.0	0.0	0.0	0.0	4.3	**0.0**	5.8
	Total	**18**	**17**	**17**	**17**	**17**	**22**	**22**	**23**	**23**										
TOTAL FRONTAGE	**A1**	80	80	74	80	76	81	81	68	**67**	61.5	64.0	59.7	64.0	60.8	62.8	62.8	52.3	**52.8**	55.0
	A2	15	16	16	16	15	16	16	17	**18**	11.5	12.8	12.9	12.8	12.0	12.4	12.4	13.1	**14.2**	8.9
	A3/A4/A5	17	18	18	18	19	19	19	19	**23**	13.1	14.4	14.5	14.4	15.2	14.7	14.7	14.6	**18.1**	16.3
	Other	16	11	11	11	11	10	10	10	**11**	12.3	8.8	8.9	8.8	8.8	7.8	7.8	7.7	**8.7**	13.4
	Vacant	2	0	5	0	4	3	3	16	**8**	1.5	0.0	4.0	0.0	3.2	2.3	2.3	12.3	**6.3**	5.7
	Total	**130**	**125**	**124**	**125**	**125**	**129**	**129**	**130**	**127**										
TOTAL DESIGNATED FRONTAGE	**A1**	75	76	71	76	72	75	75	63	**62**	67.0	70.4	66.4	70.4	66.7	70.1	70.1	58.9	**59.6**	60.5
	A2	14	15	15	15	14	14	14	15	**15**	12.5	13.9	14.0	13.9	13.0	13.1	13.1	14.0	**14.4**	9.6
	A3/A4/A5	10	11	11	11	12	12	12	12	**16**	8.9	10.2	10.3	10.2	11.1	11.2	11.2	11.2	**15.4**	15.8
	Other	12	6	6	6	6	3	3	2	**3**	10.7	5.6	5.6	5.6	5.6	2.8	2.8	1.9	**2.9**	7.8
	Vacant	1	0	4	0	4	3	3	15	**8**	0.9	0.0	3.7	0.0	3.7	2.8	2.8	14.0	**7.7**	5.7
	Total	**112**	**108**	**107**	**108**	**108**	**107**	**107**	**107**	**104**										

source: LBRuT Main Town Centre Land Use Surveys undertaken in Summer. See Appendix 1 for details.
Notes: *1 – Calculations for the Land Use Survey uses shopping frontage designations from the adopted UDP until 2010 and thereafter DMDPD designations. However, in the case of Barnes the designations have remained unchanged.

7.1b: Comparing Barnes town centre to the UK: which sectors which are well-represented & which under-represented?

Table 99: Sectoral comparison with UK average (floorspace and outlets)

	2011				
	Outlets		floorspace		
	number	UK index	amount ft2	UK index	floorspace converted to m2
comparison retail (non-food shopping)	44	102	57,300	91	5320
convenience retail (food shopping including newsagents, shoe repairs, markets)	14	136	13,200	54	1230
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	18	104	23,000	189	2140
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	22	78	39,200	101	3640
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	16	114	17,300	121	1610
Vacant	15	96	21,300	121	1980
Total	129		171,300		15910

Notes: Index of 100 = UK average, less than 100 indicates under-representation in terms of percentage than the average, and more than 100 indicates over-representation.
Total may not sum due to rounding.

Experian GOAD survey centres across the UK and produce a hypothetical average town centre based on proportions of types of businesses occupying premises. The information is produced for both the number of outlets and the amount of floorspace. If a centre has a score of 100 it means that it has the same proportion of either outlets or floorspace in a particular sector as the average UK town. A score of less than 100 suggests that that sector is under-represented and a score of more than 100, that it is over-represented.

Regarding the sectors overall, for the size of centre, Barnes is well-represented in terms of leisure and financial services in terms of both the outlets and floorspace indices.

If we consider retailing, Barnes is not likely to be considered a major comparison shopping destination but is not dissimilar to the UK average in terms of the proportion of shops to other uses. The food sector is well-represented in terms of the number of shops but below average in terms of floorspace. Food shopping is provided by a range of smaller shops rather than one or more large supermarkets which ties in with the data on multiple representation presented below. It should also be noted that the GOAD survey was undertaken before the opening of the Sainsburys Local and shows no supermarket provision at the time. Undoubtedly, the floorspace Index for food shopping will increase when re-surveyed.

In 1999 GOAD estimated that there were 50 comparison goods outlets and 20 convenience outlets, with a combined retail floorspace of 9,400m2. In 2011 the amount of retail floorspace is lower (6550m2) as are the numbers of outlets: 44 comparison goods outlets and 14 convenience (food).

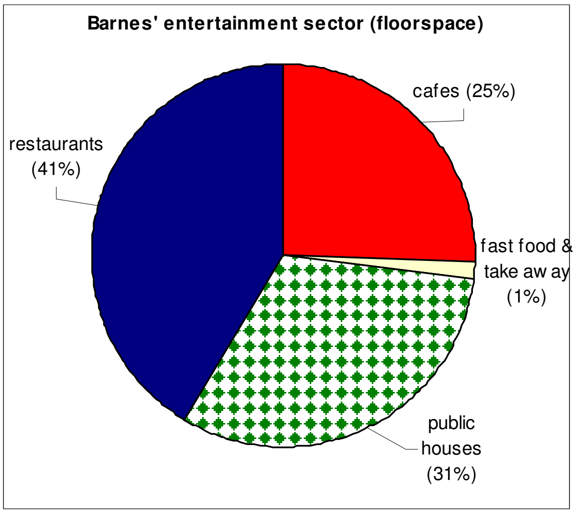
Table 100: Growth in key sectors in Barnes' local centre boundary:

	Number of outlets 1998	Number of outlets 2012	GOAD score 2011 (100 = UK average *1)
Cafes/coffee shop	4	8	118
Pubs	4	4	108
Restaurants	9	10	177
Estate agents	9	12	248
Betting shops	1	1	57

Source: LBRuT Town Centre Land Use Surveys. Figures are restricted to properties covered by the Land Use Survey which focuses on designated shopping frontages and also to those located within the town centre boundary as defined as by planning policy.

Copyright Experian GOAD. GOAD Category Report (column 3) - score of below 100 is an under-representation, score of more than 100 an over-representation compared to a hypothetical UK average based of surveys of towns and cities across the UK). This index is for number of outlets.

Since 1998 Barnes has diversified. As elsewhere there has been growth in the number of cafes (910m2), although the restaurant sector was already well-established (1,480m2). Restaurants and pubs make up the majority of the food and drink floorspace in Barnes.



Barnes has also seen an increase in the number of estate agents in the centre and now over-represented compared to the UK average. GOAD estimate that there is c.10,000 ft2 (929m2) of floorspace in use as an estate agent in Barnes, which is also proportionally significantly more the UK average (score of 323, where UK average is 100).

Charity shops

Barnes had 3 charity shops in 2011, which is in line with the UK average. See Table 5 for borough comparison.

Under-represented sectors:

Data on under representation can indicate where there are potential gaps in the market, sectors which could be developed through inward investment. It should be noted that smaller centres would not be expected to have the range of shopping found in centres such as Richmond which have a sub-regional role.

Table 101: Under-represented sectors in Barnes.

	Sector	Index less than 100 = under-representation
Food retail	bakers & confectioners	43
	greengrocers, health foods, frozen food	0
Non-food	Carpets, cycles, cards, leather goods, musical instruments & videos, office supplies, photographic & sports, second hand goods, toiletries & vehicle accessories	0
	electrical & other durable	53
	jewellery	44
	ladies wear & accessories	52
	newsagents	59
	telephones & accessories	66
Retail service	Clothing & fancy dress hire, photo processing, photography repairs	0
Leisure services	betting offices	57
	sports & leisure	0

© Copyright Experian GOAD. Source- Experian Category Report 2011
Data are for the immediate town centre as defined by Experian. They are the latest available. However, businesses will have opened and closed since surveyed.
Figure in brackets is the score comparing Barnes to the UK hypothetical town centre, in terms of outlets (not floorspace). To get a full picture of where under-representation might indicate a gap in provision, the amount of floorspace in that sector must also be considered and where worthy of note is referred to in the text. A score below 100 indicates under-representation. The lower the score, the further from the average.
Source: GOAD Category Report (2011). © copyright Experian GOAD.

Barnes is one of the few local centres which has a full range of what the Council considers to be key shops and services (see policy DM TC3 in the Development Management Development Planning Document). Further details are presented annually in the Council's Authority's Monitoring Report.

7.1 c) Multiple representation in Barnes

Table 102: Multiple representation: comparison with UK

	2011				
	number of outlets	UK index	amount of floorspace ft2	UK index	floorspace converted to m2
Total	28		44,100		4100
comparison retail (non-food shopping)	6	49	9,900	46	920
convenience retail (food shopping including newsagents, shoe repairs, markets)	5	165	5,600	58	520
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	0	0	0	0	0
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	9	165	18,200	264	1690
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	8	179	10,400	263	970
% operated by a multiple	21.7		25.7		
% of **retail sector*3** operated by a multiple	19.0		22.0		

Source © copyright Experian GOAD

Notes: *1- A multiple has 9 or more outlets. All multiples included retail, retail service, leisure service & financial and business services
*2 - It is the difference between a percentage figure for the centre and the GB average.. Index of 100 = UK average, less than 100 indicates fewer multiples in terms of percentage than the average
*3 - comparison retail and convenience retail.

See Table 10 for borough comparison. According to Experian GOAD there are only 28 multiple outlets in Barnes, which amounts to 44,100 ft2 (c 4,100m2) of floorspace. This is significantly fewer multiple outlets and floorspace than most of the larger centres examined in this report with the exception of Whitton. 22% of businesses were operated by a multiple and 19% of shops, also, not surprisingly the smallest amongst the larger centres. Barnes has a strong independent retail sector, which adds to the centre's charms and caters for its largely affluent population.

Barnes is in most respects under-represented in terms of multiples, compared to the national average. The GOAD Survey would have been undertaken prior to the opening of the Sainsburys Local. There is also an outstanding planning permission for a retail scheme off Barnes High Street (see below) which if implemented is likely to be occupied by a major food retailer.

7.2 Vacancy rates

At 6.3% Barnes' vacancy rate compares reasonably well with other local centres and the 5 larger centres (of the latter only Teddington has a lower rate of 5.2%).

Table 103: Vacancy rates in local centres in the borough 2012

	Centre vacancy rate (all frontages)
Barnes	**6.3**
East Twickenham	**7.8**
Hampton Hill	**7.0**
Hampton Village	**5.1**
Ham Common	**2.4**
Kew Gardens Station	**3.8**
St Margarets	**4.5**
Average	**5.7**

Source: LBRuT Town Centre Land Use Surveys. Produced by Policy & Design Section

blue indicates a decline in the vacancy rate and black indicates no change.

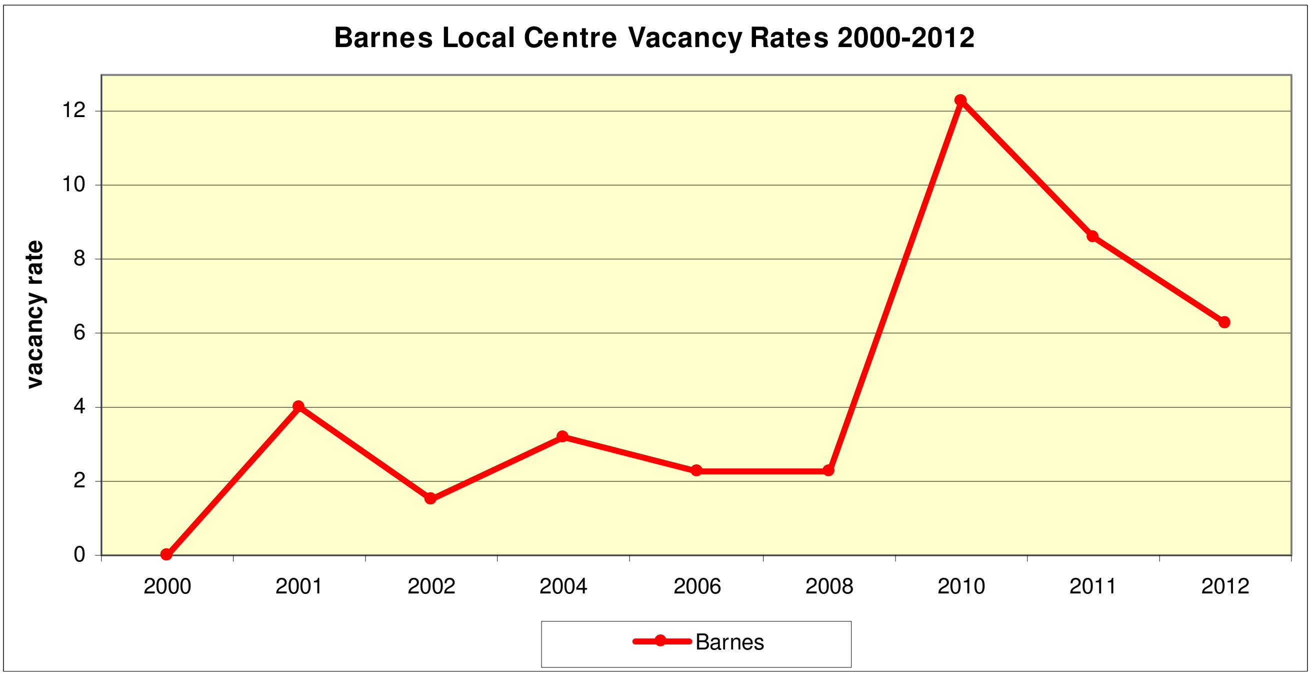
Vacancy rates have dropped noticeably in Barnes' key shopping frontage. New businesses including two new charity shops, two cafes and a restaurant. In addition, a Sainsburys Local at 10-12 High Street opened on August 11th after the Land Use Survey had taken place. Rates have risen marginally in secondary frontages. Overall rates for the whole centre have dropped from 8.6% to 6.3% between 2011 and 2012.

Table 104: Vacancy rates in Barnes (all frontages)

	Vacant uses as percentage of all uses								
	2000	2001	2002	2004	2006	2008	2010	2011	2012
Barnes	0.0	4.0	1.5	3.2	2.3	2.3	12.3	8.6	6.3

Source: LBRuT Town Centre Land Use Surveys. Produced by Policy & Design Section

Historically vacancy rates in Barnes have been extremely low. Rates rose dramatically in 2010 and although they have been falling since, they remain higher than they were, and higher than the local centre average of 5.7%.



Long-term vacancies

In July 2012 there were only 3 units which were considered to be long-term vacants, i.e. had been vacant for 2 years or more. Of these one is now occupied by the Sainsburys Local in Barnes High Street and another in Church Street has had a change of use refused.

UK comparisons

Estimates produced by Experian GOAD & the Local Data Company suggest a UK vacancy rate of c.14%. Although the methodology and date of survey does not correspond exactly with the Council's more frequent surveys it indicates that vacancy rates in the centre are slightly below the national average.

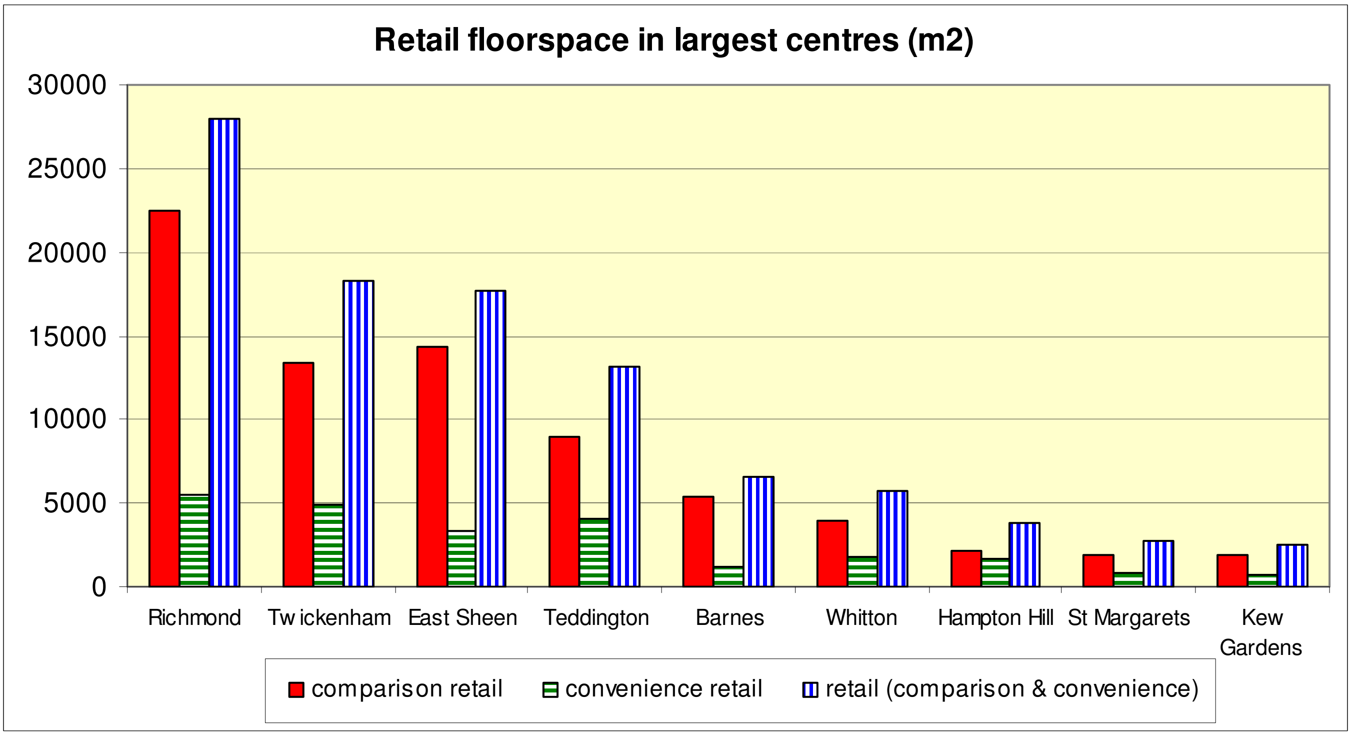
7.3 Retailer Representation

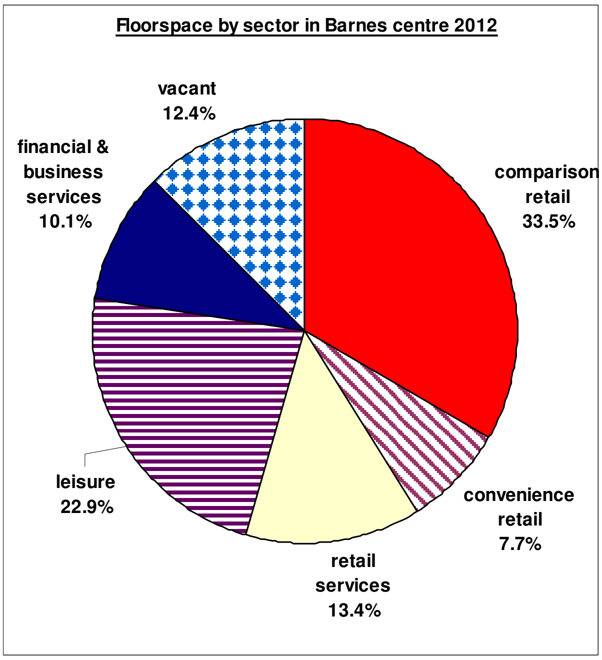
Statistics on searches for commercial property have been obtained from the South London Business database which suggest that in the first 9 months of 2012 information on available property in the Barnes/ Sheen/ Mortlake area was sought on 4,653 occasions. This includes requests for various land uses. Although this information source can only give a general view of demand it does at least suggest an increase in demand last year.

7.4 Prime Retail Rents

Zone A Rental data are not available for Barnes.

7.5 Floorspace





2011 Experian GOAD floorspace estimates by sector are included in Table 20 above. Total estimates for Barnes amount to c.16,000m2) of retail floorspace of which 5,300m2 is comparison floorspace and 1,200m2 is convenience floorspace.

Barnes has at least half of the floorspace of the larger centres, with the exception on Whitton district centre.

7.6 Employment in town centres

Statistics provided are for Barnes ward which covers an area larger than the town centre.

Resident workforce:

73.7% are economically active compared to the borough figure of 78.6%.

30% are managers and senior officials 51.5% have higher level qualifications.

The claimant count rate for Barnes ward (May 2012) was 2.2% (source ONS and GLA estimates), slightly above the borough average of 2.0%.

Barnes has a daytime population of just over 5,000, of which 2,600 is the workplace population. Numbers of those living and not working in the area is higher than the other district centres and is similar to Richmond. Only Whitton has lower daytime and workplace populations.

According to the Inter Departmental Business Register 2,900 people were employed in Barnes (primarily postcode SW13 9, but including some addresses in SW13 0 and 8) in 2010 (not Full Time Equivalents).

7.7 Footfall

Pedestrian flows counts were undertaken at 6 monitoring sites across the centre in September 2012. There is no comparative data for this centre. 9 minute counts were taken, which were then factored up to represent an estimated hourly rate. The map below shows the location of the sites and identifies the estimated count at the lunchtime peak. Table 104 on the following page presents the data in full.

Footfall appears fairly uniform across the centre is busiest at the Church Road end at points 1 (furniture retailer - NonSuch) and 2 (Medivet) during lunchtime. Although the highest flows were recorded at lunchtime for most of the sites, the highest scores were recorded at the 4-5pm slot for sites (3) Phase 8 and (4) Winkworths. The busiest spot overall is the furniture retailer Nonsuch which is close to the NatWest Bank and bus stop for the Hammersmith service. However, the point outside Winkworths on Barnes High Street is the busiest at both the mid morning and late afternoon count.

Point 6 outside the jewellers on Barnes High Street is the least busy overall. However, Sainsburys Local (added to record evening flow) is on the same side of the road and had recently opened when surveyed, has the highest peak overall. This may reflect the fact that at this point in the evening there are few others retailers open in the centre, but nevertheless shows the value of a convenience store open to catch commuters.

Pedestrian flowcounts in Barnes (estimated hourly flows 1 to 2 pm) Sept 2012

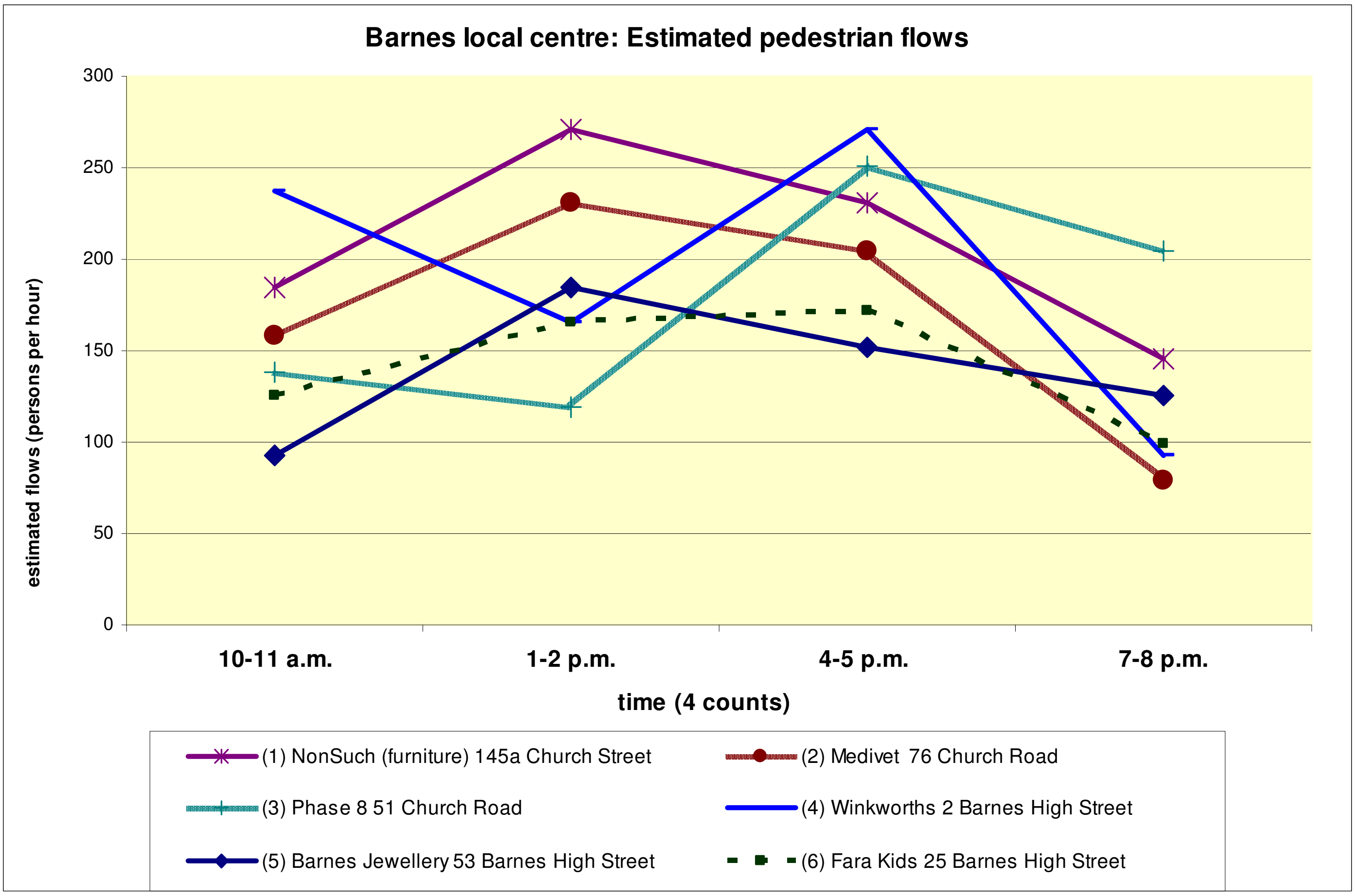
Source: LBRuT monitoring. Produced by Planning Policy Section

This local centre does not having a large employment base & day time population and this may go someway to explain why the data are fairly uniform, i.e. the busy and quiet spots are less easily discernible. Its comparison retail offer is significantly smaller than Richmond and the district centres, with the exception of Whitton. The same can be said for its entertainment offer, which may well reflect the overall size of the centre and its position in the hierarchy.

Table 105: Estimated pedestrian flowcounts in Barnes 2012

		2012			
Monitoring sites		Thursday 20th September			
Premises Name	Address	10-11 a.m.	1-2 p.m.	4-5 p.m.	7-8 p.m.
(1) **NonSuch (furniture)**	145a Church Street	185	271	231	145
(2) **Medivet**	76 Church Road	158	231	205	**79**
(3) Phase 8	51 Church Road	139	119	251	205
(4) Winkworths	2 Barnes High Street	238	165	271	92
(5) Barnes Jewellery	53 Barnes High Street	92	185	152	125
(6) Fara Kids	25 Barnes High Street	125	165	172	99
(7) Sainsburys Local *1					**304**

Source LBRuT Planning Policy Team.
Weather conditions 2012: Mild and dry
Notes - Figures are extrapolated from 9 minute counts. Barnes pedestrian flowcounts first undertaken in 2012.
*1 - Added in on-site to catch evening flow specifically.



Source: LBRuT monitoring. Produced by Planning Policy Section

Pedestrian flowcounts were undertaken by the then Town Centre Manager for Barnes in April 2010. Overall, the conclusion was that footfall needed to be increased. The data are not comparable as methodologies used were different in a number of ways. However, the overall level was also fairly uniform in terms of number of pedestrians and spread throughout the day at both the High Street/ Station Road end and Church Road, (although a drop-off between 4pm and 5 pm). Counts were also taken on Saturdays which were significantly higher than weekdays, particularly in the morning, corresponding with the Farmers' market.

7.8 Accessibility & parking

Table 106: Bus Routes – Barnes local centre

Bus routes serving the local centre are as follows:

	number of buses per hour							**List of key centres passed through**
	Monday to Friday			Saturday		Sunday		
Service Number	Peak	Off peak	Eves	Day	Eves	Day	Eves	
33	7	7	4	7	6	7	4	Hammersmith, East Sheen, Richmond, Twickenham, Teddington
337	5	5	4	5	4	4	4	Putney, East Sheen, Richmond
493	5	5	3	5	3	3	3	Richmond, East Sheen, Roehampton, Wimbledon, Tooting,
72	8	7	5	7	5	5	3	East Acton, Roehampton
485	2	2	1	2	1	-	-	Wandsworth, Putney, Barnes, Hammersmith
969	limited service to Roehampton Vale Asda							

Source: TfL website

Neither Barnes BR Station or Barnes Bridge Station are directly within the local centre.

Free parking is provided at the Barnes Wetland Centre a short distance from the local centre.

7.9 Customer and resident's views

The Council's All in One Consultation was undertaken in November 2010 and followed up with a series of local events. The full results for this area can be viewed on the Council's website using the following link: http://www.richmond.gov.uk/barnesa4.pdf.

Key results are:

The things that were most important in making it a good place to live included:

- 72% - Local parks and open spaces
- 39% - Level of crime and anti-social behaviour
- 39% - Shopping in your local high street
- 38% - Public transport
- 18% - Amount of litter and/or cleanliness of streets
- 18% - Waste and/or recycling

The things that most needed improving in your area included:

- 35% - Condition of pavements
- 30% - Traffic and/or levels of congestion
- 26% - Shopping in your local high street
- 23% - Condition of roads
- 23% - Support for local businesses

There were 1174 responses in this area.

7.10 Anti- Social behaviour levels

The following data summarises the Richmond Council recorded ASB levels for 2011-12 in the main town centre wards. ASB is gathered at ward level every month from three council databases, amalgamating data and isolating data for town centres is difficult. The data provided covers 80% of reporting for the year.

ASB reporting in the borough is based on perception and is therefore subjective. Reporting to the Council is primarily "Environmental ASB", where the issue is with a physical location rather than with people. Reports concerning the later are usually addressed directly to the Police. "Environmental ASB" includes littering and fly tipping. However one-fifth of calls related to Noise, which is nine times out of ten an issue with human interaction and tolerance levels.

Of the three main ASB categories[54], barely 1% of council ASB calls/reports fall under the most serious category Level One (Personal). Around 14% of calls fall under Level Two (Nuisance) and 85% of calls/reports fall under the least serious category Level Three (Environmental).

Table 107: ASB Reporting for Barnes 2011/12

Centre	Number of ASB reports in centre	Environs*1	% ASB taking place in centre	ASB Level
Barnes	42	182	22%	Low
Whitton	42	137	31%	Low
East Sheen	127	288	44%	Medium
Teddington	62	240	26%	Low
Twickenham	219	390	59%	Medium-High
Richmond	276	471	59%	Medium-High

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

[54] Personal : 'Personal' is designed to identify ASB incidents that the caller, call-handler or anyone else perceives as either deliberately targeted at an individual or group or having an impact on an individual or group rather than the community at large.
Nuisance: 'Nuisance' captures those incidents where an act, condition, thing or person causes trouble, annoyance, inconvenience, offence or suffering to the local community in general rather than to individual victims
Environmental: 'Environmental' deals with the interface between people and places. It includes incidents where individuals and groups have an impact on their surroundings including natural, built and social environments.

Notes *1 = covers the area around the main town centres, which is not the entire ward, as defined by the Community Safety Data Analyst

All levels of ASB reported to the Council are quoted in relation to the local borough and not pan-London. If these town centres were compared to local town centres such as Kingston, Hounslow or Hammersmith, they would all be classified as Low.

Map of ASB calls/ incidents in Barnes High Street area 2011/12

Source: Community Safety Data Analyst, Community Safety Partnership, 2012

Notes
1. These maps are a pictorial illustration and do not show all the ASB recorded in the total figure. Ward level identification has been used when mapping co-ordinates are not available.

Key findings:

- There were 42 reports of ASB in Barnes local centre during 2011-12, which is an average of 4 calls/reports per month.
- The main type of ASB reported was litter. The green circles designate the ASB “hotspots”, both relating to litter.
- As the town centre straddles the border of two wards it is difficult to get an accurate figure of how Barnes local centre contributes to ASB in the area as a whole. There were 182 ASB reports made in the wider area surrounding the High Street, and therefore the centre itself contributes a relatively low 22%.

The overall message is that ASB reporting in Barnes is low, both compared to a regional and borough picture and the key issue is littering.

7.10 (b)ii Crime levels

Data are not released for Barnes as crime levels are too low.

7.11 State of the town centre: environmental quality

Overall, the assessed areas in Barnes have very limited amount of open spaces within them, but some major open spaces, such as Barnes Green and Barn Elms Playing Fields, are nearby and very close to the centres. The majority of the areas making up the Barnes local centre are within Conservation Areas and there are many historic assets, including 6 Listed Buildings and 104 Buildings of Townscape Merit. Whilst there are no air quality analysers within the designated areas, the two nearest monitors (at Castelnau Library and Wetlands Centre) show that in the past couple of years, the air quality objective has been met. In comparison to the other centres/town centres, Barnes has the best air quality.

The environmental quality of the Barnes local centre has been assessed by dividing the centre into three areas: (1) Barnes High Street, (2) Church Road, Grange Road, Kitson Road and (3) Church Road / Castelnau. See Appendix 4 for a map of the areas that have been surveyed.

Barnes High Street (Area 1) is of very high environmental quality, with good use of materials for surfacing and paving. There are no problems with street clutter, litter or fly-posting and graffiti. There may be some scope for more street furniture in terms of new benches. Whilst there are plenty of hanging baskets that add positively to the look and feel of the town centre, there is very limited tree planting, so there may be scope for more. Overall, although the area can be dominated by traffic, it is very pleasant with good quality design and public realm quality.

The small parade of shops at **Church Road (Area 2)** is a very pleasant and welcoming area. Whilst there is no space or scope for tree planting and other vegetation, Barnes Green is just opposite the road. This small area is generally too constrained for street furniture. At the time of the survey, there was only one empty shop in this parade, which looked a little bit run down, but generally this parade has been assessed as having a very high environmental quality.

The environmental quality of the parade/centre at **Barnes Church Road / Castelnau (Area 3)** is very similar to the other areas of Barnes. Whilst it can be somewhat impacted by traffic and the busy junction, it is very noticeable that recent improvements have been carried out. As such, the street paving, condition and quality of pavements are very good. The vegetation and landscaping is of very high quality, with plenty of hanging baskets, tree planting and the open space at St Mary's Churchyard.

See Appendix 3 for the detailed results of the desk-based assessment, including analysis of open spaces, historic assets, air quality etc.

The individual survey sheets for the areas assessed can be found in Appendix 5.

7.12 Implementation of proposal sites

Table 108: Implementation of UDP Proposal Sites in Barnes

Proposal site		Description	Progress in 2007/08	Progress in 2008/09	Progress in 2009/10	Progress in 2010/11	Progress in 2011/12
B2	Barnes Station and Former Goods Yard	car park, transport interchange facilities public open space	not implemented	not implemented	not implemented	not implemented	Development underway
B4	Mill Hill/ Rocks Lane	junction improvement, highway drainage	feasibility study commissioned	not implemented	not implemented	not implemented	In design stage
B5	Barn Elms Sports Ground	rationalisation of sports use, indoor sports hall, upgrading sports pitches, enhancement of landscape	not implemented	not implemented	not implemented	not implemented	not implemented
B6	Beverley Brook	pedestrian access to Richmond Park	not implemented	not implemented	not implemented	not implemented	not implemented
B7	Barnes Bridge Station	interchange improvements	not saved. Phase I underway	implemented	implemented	implemented	Not saved

Source: Extract from Appendix of Authorities Monitoring Report 2010/11.

None of the four proposal sites with the town centre boundary have been implemented. However, development is underway at the Barnes Station and Former Goods Yard site. Junction improvements at Mill Hill/Rocks Lane are at the design stage. Currently those proposal sites saved from the UDP remain part of the development plan. However, it should be noted that work is underway on the Site Allocations DPD which may well include further sites in the local centre.

7.13 Completions and commitments

Table 109: A1 Use Class (shop) completions within Barnes mixed use area 1/10/2007 to 1/4/2012

			New completed floorspace 1*			Net additional floorspace 2* (taking account of losses)		
application ref	address	summary of proposal	new completed floorspace (m2) (gross external)	new gross internal floorspace m2 3* (gross internal)	of which net tradable floorspace m2 4* (gross internal)	net additional floorspace (gross external)	net additional floorspace (gross internal)	of which net tradable floorspace
07/1716 (08/3848 revision)	49 Church Road, Barnes***5**	Change of use to unify the existing retail floor space into 1no. self contained (A1) shop unit with ...first floor extension, various roof extensions and alterations to form 1no. one bedroom flat and 2no. studio bed-sitting room flats.				-11	-10.6	-2
08/2299	83 Church Road, Barnes	Alterations ..to form a self contained one bedroom flat above an existing shop.				-21	-20.2	11
07/3387/FUL	85 Church Road	Demolish and rebuild rear ground floor	46	46		-19	-18.3	
09/2329/FUL	175 Church Road, Barnes	Front and side extension to an existing 4 story mixed use to allow for the provision of an additional four self contained flats.				-32	-30.8	0
10/1988/FUL	77 Church Road, Barnes	Existing ground floor retail reduced in depth, existing office to first floor converted to self contained flat accessed from external rear staircase.				-39	-37.5	-3
11/0635/FUL	10-12 Barnes High Street***6**	Erection of ground floor extension to existing retail unit and first floor addition to existing office accommodation. (ground floor extension previously approved under planning application 04/3673/EXT).	129	124.2	135	129	124.2	135
		TOTAL	175	170.2	135	7	6.7	141

Source : LBRuT Decisions Analysis system. Produced by Planning Policy Section.

Notes:

1* - New floorspace completions plus gains from change of use and conversions
2* - Net additional floorspace - takes account of losses and gains
3* Difference between gross external and gross internal floorspace defined by DCLG as 3.75%
4* Net tradable floorspace is the amount of gross internal floorspace which is trading floorspace i.e. sales space which customers have access to. Where retail sales area of either the existing or proposed development, or both is not known a proxy is calculated using a 80/20 ratio **(identified in bold)**
5* Planning permission refused for change of use to A2.
6* Completion date is after April. However, store open Autumn 2012.
.

Much of the change in the centre has resulted from minor alteration or partial change of use. The significant change has been the opening of the Sainsburys Local in the High Street (including an extension to the former retail unit). Barnes is unusual in being the largest of the local centres, but without a modest sized supermarket. A permission is outstanding for such a supermarket, also in the High Street end of the centre.

Commitments

Table 110: Commitments in pipeline (additional retail) in Barnes local centre (outstanding at Apr 2012)

				Additional retail in pipeline		
application ref	decision date	address	Proposal	approx retail sales area m2	Ancillary retail m2	total m2
10/2112/FUL	22-Jun-11	Number 29 And Garages Adjacent To 27 Barnes High Street Barnes, London SW13 9LW	Demolition of rear extension to Claridge House and garages. Construction of new retail unit, offices at first and second floors (2 units), residences at first and second floors (5 units), plant space ancillary to retail unit. …	518	288	806
			TOTAL	518	288	806

Source: LBRuT Decisions Analysis system. Produced by Planning Policy Section .
Notes: Table includes additional space only, not where there is a reduction in retail space.

7.14 Potential for growth & change

The Council commissioned consultants GVA Grimley to produce a retail capacity study and subsequent update, forming part of the evidence base for the LDF and hence planning policies for town centres. It identified need and capacity in terms of quality and quantity for additional retail development (for food & non-food goods) in the borough. It assessed the capacity of existing centres to accommodate any identified requirements, and advised on a range of sites in terms of a preliminary assessment. The Council's strategy is to steer major retail development into the 5 main centres in the borough, for which separate forecasts were produced. A smaller centre Barnes is not considered separately and therefore a quantified allocation is not included in the Core Strategy. The overall objective for local and neighbourhood centres is to strengthen neighbourhood and local centres by encouraging a range of shops, services and other uses consistent with meeting people's day to day needs. Encourage other uses of a scale appropriate to the centre (Policy CP8). Therefore modest growth is expected and in line with the size and function of the centre (See Policy DM TC2).

7.15 Town centre management & economic development

Barnes was awarded £376,000 in 2011 from the Mayor's Outer London Fund.
This funded a balanced programme of works including physical improvements and a range of softer, cultural elements to engage people in the town centre.

The improvements included the major upgrading of paving, addressing a key concern of residents. This has vastly improved both the appearance and accessibility of the Church Road shopping area. Refitting of a new information centre for visitors, enhanced Christmas lighting and complementary cultural projects have all contributed to the development of the high street. The creation of the' Barnes Trail' through signposting and information boards provides an innovative and lasting symbol of Barnes's development.

These projects and their implementation have helped to bring residents and businesses together in the interests of the town centre.

The Outer London Fund projects sit alongside enhancements to the nearby Castlenau Community Project, as part of the Council's £11m 'Uplift Programme'. Works include internal and external improvements to the community building, along with exterior landscaping. The work is also galvanising volunteer involvement.

The Council also contributes funds to support the Barnes Town Centre Manager and will be supporting the establishment of a new locally-led Town Team during 2013. This approach will help strengthen the involvement of residents and businesses in town centre issues.

Summary

Barnes, like other centres has experienced change over the last decade or so and in common with the larger borough centres has seen a fall in shop numbers and a reduced retail offer. Clearly existing retailers are operating during difficult economic conditions and wider changes in the way we shop. Barnes' shopping offer commensurate with its role as a local centre, and in terms of comparison (non-food shopping) it is similar to the UK average. The number of food shops is smaller than the average, but there is less floorspace (the centre was surveyed Sainsburys Local has opened). There is also permission for another potential supermarket. On the whole Barnes provides well for local shopping and has a full range of essential shops and services, and also retains a fishmonger and greengrocer which many other centres have lost. Barnes has a strong independent non-food shopping offer which can be considered a strength, helping to distinguish it from other centres and meeting the needs of the largely affluent population it serves.

Barnes has an established restaurant sector, and already has a “destination offer” which is being encouraged generally to widen the role of centres. There has been growth in the number of cafes, and significantly in the number of estate agents in Barnes in recent years.

Vacancy rates are often regarded as a key indicator of the health of town centres. Barnes has had historically very low rates. These rates increased dramatically post 2008 but have been improving since 2010 and are now similar to the average for a local centre. Nevertheless, close monitoring of vacancy rates is needed and indeed is published annually in the Council’s Authority’s Monitoring Report.

Environmental quality is considered to be very high and recent investment is clearly visible and has helped to sustain the existing pleasant environment of Barnes, which is rich in historic assets. Anti-social behaviour reporting is low and actual crime is too low for data to be released.

Although the picture is generally a positive one, the continued support and development of the town is encouraged through the active town centre management which already exists.

Appendices

Appendix 1: Methodology of Town Centre Land Use Surveys & Guide to the Use Classes Order

LBRuT Town Centre Land Use Surveys : Methodology, data collection & analysis

The Council has undertaken an Annual Land Use Survey of borough centres since the late 1990s.

The land use survey is a snap shot survey, undertaken by observation in the field, i.e. the researcher makes a judgement as to the nature of the occupier on that particular today. Information is not requested from landlords, nor verified by an alternative data source for example Business Rates, unless being used for GIS mapping. A judgement will be taken by the surveyor in the field as to whether the business is operating, but not open on the survey day. This would include for example, businesses only opening in the evenings, and some shops which still close on Wednesday afternoons.

Only the ground floor use is recorded, unless specified (one-off for 1998 survey). It is therefore not a survey of floorspace. (Richmond has a number of stores which operates sales areas over several floors.) Analysis counts businesses once per centre unless operating from separate premises within the same centre. Therefore, the amalgamation of units will not show the increase in floorspace and may in fact indicate a decrease in units in a particular use class, although the denominator would be reduced in line.

As many businesses are included as possible including a small number which are outside of town centre boundaries/mixed use areas as defined in the LDF.

Please note that the Land Use Survey was not undertaken in 2000 and a partial survey of the larger centres was undertaken in 2003.

Long term vacancies are those which were vacant when the 2010, 2011 and 2012 Surveys were undertaken.

Use Classes Order	Description
A1	**Shops**, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, Internet cafes, sandwich bars, funeral directors
A2	**Professional and financial services,** banks, building societies, estate and employment agencies, betting offices
A3	**Restaurants & cafes** – sale of hot food for consumption on the premises
A4	**Drinking Establishments** – public house, wine bar or other drinking establishment
A5	**Hot food takeaways** – sale of hot food for consumption of the premises
B1	B1 Business - Offices (other than those that fall within A2), research and development of products and processes, light industry appropriate in a residential area.
B2	General industrial - Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste).
B8	**B8 Storage or distribution -** This class includes open air storage.
C1	Hotel, boarding and guest houses where no significant element of care is provided.
C2	Residential schools and colleges. Hospital and convalescent/ nursing homes
C2A	**Secure Residential Institution** - Use for a provision of secure residential accommodation, including use as a prison, young offenders institution, detention centre, secure training centre, custody centre, short term holding centre, secure hospital, secure local authority accommodation or use as a military barracks.
C3	**Dwellinghouses -** this class is formed of 3 parts:
	• C3(a) covers use by a single person or a family (a couple whether married or not, a person related to one another with members of the family of one of the couple to be treated as members of the family of the other), an employer and certain domestic employees (such as an au pair, nanny, nurse, governess, servant, chauffeur, gardener, secretary and personal assistant), a carer and the person receiving the care and a foster parent and foster child.
	• C3(b): up to six people living together as a single household and receiving care e.g. supported housing schemes such as those for people with learning disabilities or mental health problems.
	• C3(c) allows for groups of people (up to six) living together as a single household. This allows for those groupings that do not fall within the C4 HMO definition, but which fell within the previous C3 use class, to be provided for i.e. a small religious community may fall into this section as could a homeowner who is living with a lodger.
C4	**Houses in multiple occupation** - small shared dwelling houses occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities such as a kitchen or bathroom.
D1	Non-residential institutions e.g. places of worship, church halls Clinics, health centres, crèches, day nurseries, consulting rooms Museums, public halls, libraries, art galleries, exhibition hall Non residential education and training centres
D2	Assembly and leisure - Cinemas, music and concert halls, bingo and dance halls (but not night clubs), swimming baths, skating rinks, gymnasiums or area for indoor or outdoor sports and recreations (except for motor sports, or where firearms are used).
Sui Generis	Certain uses do not fall within any use class and are considered 'sui generis'. Such uses include: theatres, houses in multiple occupation, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/or displaying motor vehicles. Retail warehouse clubs, nightclubs, launderettes, taxi businesses, amusement centres and casinos. Theatres, nightclubs

The classes of use for England are set out in the Town and Country Planning (Use Classes) Order 1987 and its subsequent amendments. The following list gives an indication of the types of use which may fall within each use class. Please note that this is a guide only and it's for local planning authorities to determine, in the first instance, depending on the individual circumstances of each case, which use class a particular use falls into.

Appendix 2: Tables for Local centres:

Data for local centres are presented for the purposes of comparison.

Table A1: Percentage of A1 uses (shops) in designated key shopping frontages

	Proportion of A1 uses in designated key shopping frontages										number of uses in KSF
	2012	2011	2010	2008	2007	2006	2005	2004	2002	2001	**2012**
local centres											
Barnes	**63.6**	63.6	58.2	74.4	75	74.4	75.6	70.9	75.9	73.4	**77**
East Twickenham	**63.2**	68.4	73.7	73.7	68.4	68.4	68.4	73.7	73.7	68.4	**19**
Hampton Hill	**78.6**	85.2	80	80	80	80.0	80	80	80	80	**28**
Hampton Village	**67.9**	67.9	66.7	69.2	60	69.2	69.2	68	72	72	**28**
Ham Common	**66.7**	66.7	63.3	66.7	69.8	70.0	70	72.4	70	70	**30**
Kew Gardens Station	**68.0**	68.0	66.7	69.6	72.4	73.9	76	73.1	74.1	74.1	**25**
St Margarets	**64.5**	64.5	64.5	64.5	63.6	64.5	67.7	64.5	64.5	60	**31**
average	**66.8**	**67.9**	**65.1**								

Source: LBRuT Town Centre Land Use Surveys. Produced by Planning Policy Section.
Red indicates a reduction in the last year and **blue** an increase.

Notes:
3. LDF Development Management Plan designations used for calculations from 2011 onwards. A * identifies a centre where changes have been made to key shopping frontage designations.
4. Includes parades with designated key frontage only.
5. Surveys of all centres are undertaken in the Summer.
6. The Town Centre Land Use Survey is a snap shot survey, undertaken by observation in the field, i.e. the researcher makes a judgement as to the nature of the occupier at that particular time. It is not verified by an alternative data source. Only the ground floor use is recorded. Analysis counts businesses once per centre unless operating from separate premises within the same centre. Therefore, the amalgamation of units will not show the increase in floorspace and may in fact indicate a decrease in units in a particular use class, although the denominator would be reduced in line. Likewise subdivisions would increase the number of units in the centre, without impact on floorspace.
7. See Appendices for definition of A1 Use Class.

Table A2: Vacancy rates in the smaller centres in 2012

	key shopping frontage				**secondary shopping frontage**				**all designated frontage**				**all frontage**
	2008	**2010**	**2011**	**2012**	**2008**	**2010**	**2011**	**2012**	**2008**	**2010**	**2011**	**2012**	**2012**
Local centres													
Barnes	11.5	17.7	11.7	6.5	0	3.6	3.7	11.1	8.5	14.0	9.6	**7.7**	**6.3**
East Twickenham	5.3	0	5.3	5.3	5.7	13.2	9.4	9.4	5.6	9.7	8.3	**8.3**	**7.8**
Hampton Hill*	0	4	0.0	3.6	4.3	4.3	6.3	4.3	2.8	2.9	4.0	**4.0**	**7.0**
Hampton Village	11.5	11.1	7.1	7.1	5	19.0	21.1	5.6	8.7	9.1	12.8	**6.5**	**5.1**
Ham Common	3.3	3.3	0.0	0.0	0	0	0	0	2.9	2.9	0.0	**0.0**	**2.4**
Kew Gardens Station	4.3	4.2	4.0	4.0	0	6.3	6.3	6.3	2.6	5.0	4.9	**4.9**	**3.8**
St Margarets	3.2	0	3.2	3.2	3.1	6.3	12.1	6.3	3.2	3.2	7.8	**4.8**	**4.5**
average		**8.5**	**5.9**	**4.6**		**8.5**	**9.0**	**7.0**		**8.5**	**7.3**	**5.7**	**5.7**

Table A3: Key shops and services in local centres in the borough.

	Number of key shops/ services in centre.				
centre	2005	2007	2010	2011	2012
Local centres					
Barnes	11	11	11	11	10
East Twickenham	8	8	6	7	7
Ham Common	10	10	10	10	10
Hampton Hill	9	10	10	11	11
Hampton Village	10	10	10	10	10
Kew Gardens Station	8	9	9	9	9
St Margarets	9	9	9	10	10

Table A4: Sectoral comparison with UK average (floorspace and outlets) for various local centres

Barnes:

	Outlets		floorspace		
	number	UK index	amount ft2	UK index	floorspace converted to m2
comparison retail (non-food shopping)	44	102	57,300	91	5320
convenience retail (food shopping including newsagents, shoe repairs, markets)	14	136	13,200	54	1230
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	18	104	23,000	189	2140
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	22	78	39,200	101	3640
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	16	114	17,300	121	1610
Vacant	15	96	21,300	121	1980
Total	129		171,300		15910

Notes: Index of 100 = UK average, less than 100 indicates under-representation in terms of percentage than the average, and more than 100 indicates over-representation.
Total may not sum due to rounding.

Kew Gardens (Dec 2010)

	Outlets		floorspace		
	number	UK index	amount ft2	UK index	floorspace converted to m2
comparison retail (non-food shopping)	17	102	20,200	100	1880
convenience retail (food shopping including newsagents, shoe repairs, markets)	7	175	7,300	93	680
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing**)**	7	104	6,200	158	580
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	13	119	15,300	124	1420
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	5	92	5,100	112	470
Vacant	1	16	700	13	65
Total	50		54,800		5090

Hampton Hill (Oct 2011)

	Outlets		floorspace		
	number	UK index	amount ft2	UK index	floorspace converted to m2
comparison retail (non-food shopping)	23	81	22,900	57	2130
convenience retail (food shopping including newsagents, shoe repairs, markets)	7	103	17,700	113	1640
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing)	14	123	11,800	151	1100
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	20	108	27,500	111	2560
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	13	140	14,800	162	1380
Vacant	8	78	15,000	136	1390
Total	85		109,700		10190

St Margarets (May 2011)

	Outlets		floorspace		
	number	UK index	amount ft2	UK index	floorspace converted to m2
comparison retail (non-food shopping)	21	105	20,800	97	1930
convenience retail (food shopping including newsagents, shoe repairs, markets)	6	125	9,000	108	840
retail services (including health & beauty, POs, travel agents, vehicle repair, opticians, petrol filling stations, photo processing)	11	137	8,200	197	760
Leisure services (cafes, bars, restaurants, PHs, hotels, night clubs)	13	99	12,500	95	1160
financial & business services (banks & building societies, business services, printing & property services, building supplies and services)	6	92	5,500	113	510
Vacant	3	92	2,300	39	210
Total	60		58,300		5420

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Nese keni veshtersi per te kuptuar kete botim, ju lutemi ejani ne recepcionin ne adresen e shenuar me poshte ku ne mund te organizojme perkthime nepermjet telefonit.

Albanian

إذا كانت لديك صعوبة في فهم هذا المنشور، فنرجو زيارة الإستقبال في العنوان المعطى أدناه حيث بإمكاننا أن نرتب لخدمة ترجمة شفوية هاتفية.

Arabic

এই প্রকাশনার অর্থ বুঝতে পারায় যদি আপনার কোন সমস্যা হয়, নিচে দেওয়া ঠিকানায় রিসেপ্শন-এ চলে আসুন যেখানে আমরা আপনাকে টেলিফোনে দোভাষীর সেবা প্রদানের ব্যবস্থা করতে পারবো।

Bengali

اگر در فهمیدن این نشریه مشکلی دارید لطفا به میز پذیرش در آدرس قید شده در زیر مراجعه نمایید تا ترتیب ترجمه تلفنی برایتان فراهم آورده شود:

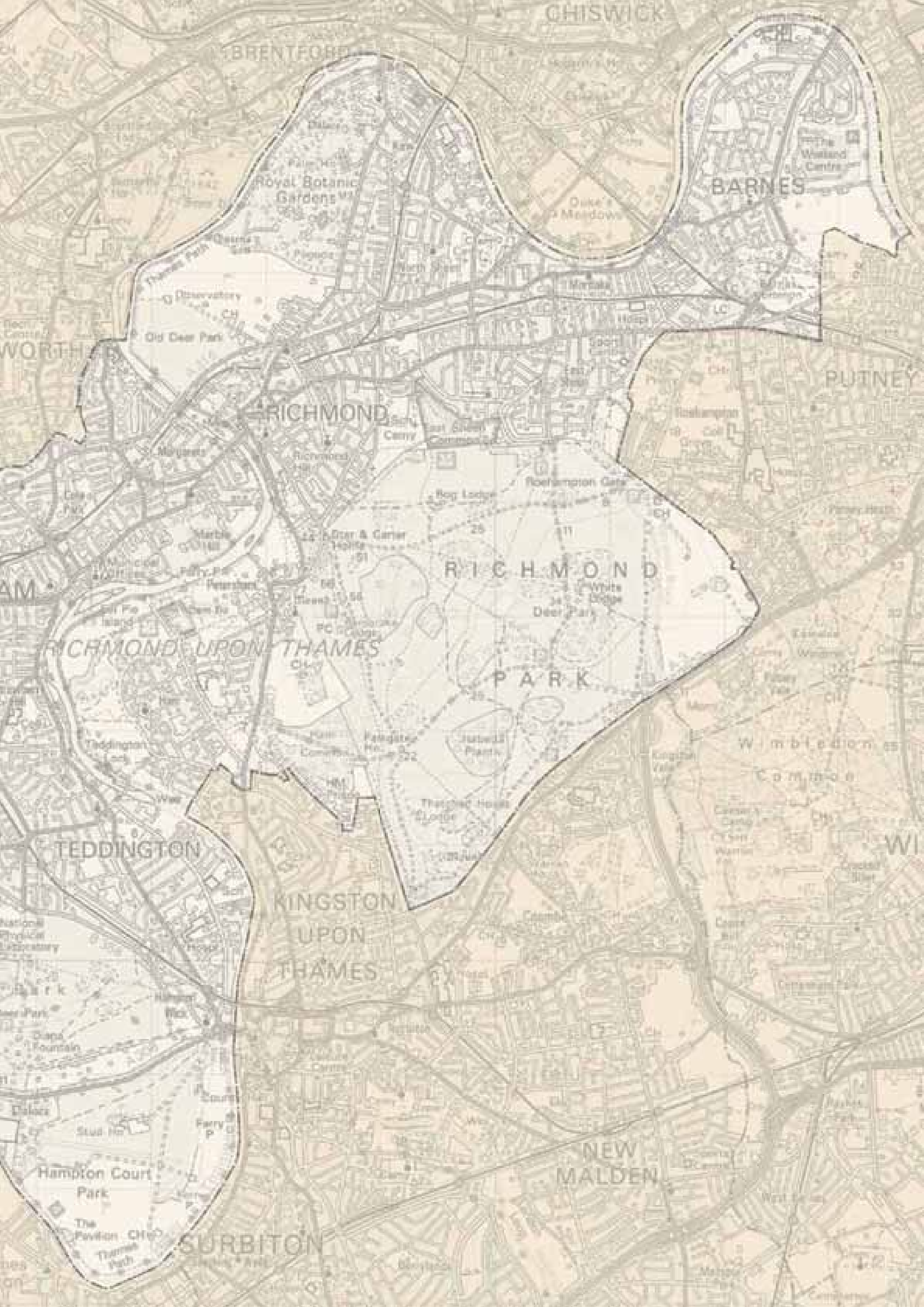
Farsi

જો તમને આ પુસ્તિકાની વિગતો સમજવામાં મુશ્કેલી પડતી હોય તો, કૃપયા નીચે જણાવેલ સ્થળના રિસેપ્શન પર આવો, જ્યાં અમે ટેલિફોન પર ગુજ રાતીમાં ઇન્ટરપ્રિટીંગ સેવાની ગોઠવણ કરી આપીશું.

Gujurati

ਜੇਕਰ ਤੁਹਾਨੂੰ ਇਸ ਪਰਚੇ ਨੂੰ ਸਮਝਣ ਵਿਚ ਮੁਸ਼ਕਲ ਪੇਸ਼ ਆਉਂਦੀ ਹੈ ਤਾਂ ਹੇਠਾਂ ਦਿੱਤੇ ਗਏ ਪਤੇ ਉੱਪਰ ਰਿਸੈਪਸ਼ਨ 'ਤੇ ਆਓ ਜਿੱਥੇ ਅਸੀਂ ਟੈਲੀਫ਼ੋਨ ਤੇ ਗੱਲਬਾਤ ਕਰਨ ਲਈ ਇੰਟਰਪ੍ਰਿਟਰ ਦਾ ਪ੍ਰਬੰਧ ਕਰ ਸਕਦੇ ਹਾਂ।

Punjabi


CHISWICK
BRENTFORD
Royal Botanic Gardens
BARNES
Old Deer Park
RICHMOND
PUTNEY
Roehampton Gate
RICHMOND
White Lodge
Deer Park
RICHMOND UPON THAMES
PARK
Wimbledon
Common
TEDDINGTON
KINGSTON
UPON
THAMES
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SURBITON

London Borough of Richmond upon Thames

Environment Directorate

Policy & Design Section

Civic Centre

44 York Street

Twickenham

Middlesex TW1 3BZ

T 020 8891 7117

E ldf@richmond.gov.uk

www.richmond.gov.uk

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