LONDON BOROUGH OF RICHMOND UPON THAMES

Town Centre Health Checks 2013

Summary

Produced by Planning Policy Section

LONDON BOROUGH OF
RICHMOND UPON THAMES

Richmond upon Thames

Town Centre Health Checks 2013

Summary

Produced by LDF Team
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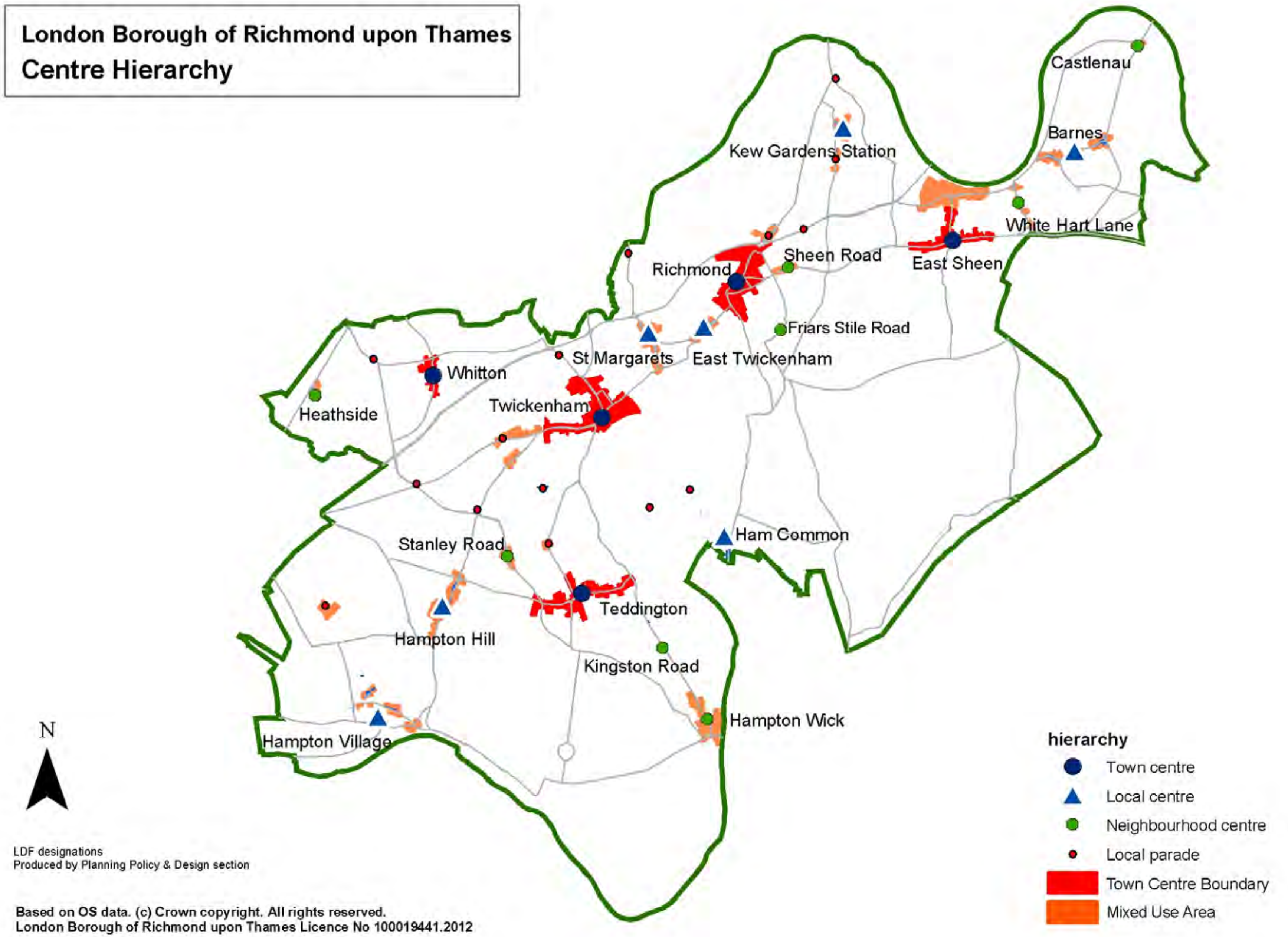
London Borough of Richmond upon Thames
Centre Hierarchy
Castlenau
Barnes
Kew Gardens Station
White Hart Lane
Sheen Road
East Sheen
Richmond
Friars Stile Road
St Margarets
East Twickenham
Whitton
Twickenham
Heathside
Ham Common
Stanley Road
Teddington
Hampton Hill
Kingston Road
Hampton Wick
Hampton Village
N
hierarchy
Town centre
Local centre
Neighbourhood centre
Local parade
Town Centre Boundary
Mixed Use Area
LDF designations
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Introduction

Town Centre Health Checks have been produced for the larger centres in the borough: Richmond, Twickenham, East Sheen, Teddington, Whitton and Barnes. The main purpose is to assess the buoyancy of the centres, comparing them to each other and making national comparisons. This is one in a series produced over the years, in 1998, 2000, 2003, and more recently in 2006. Key indicators such as vacancy rates are published every year in the Authority's Monitoring Report.

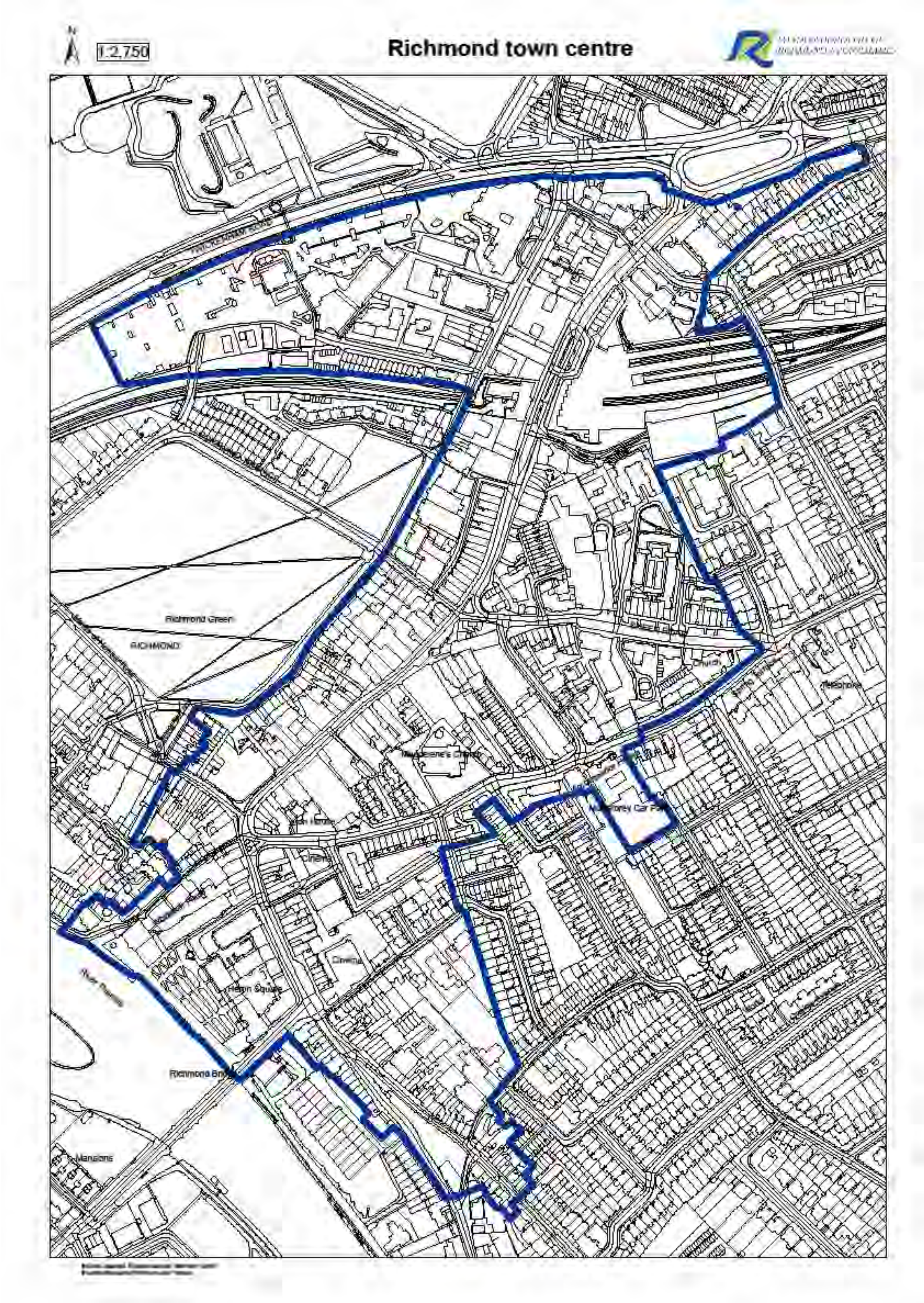
The National Planning Policy Framework requires Council's to produce planning policies based on up to date evidence and to monitor the effectiveness of policies. The Mayor's London Plan specifically requires town centre health checks and also its good practice to have sound factual information. The report draws on a range of sources, some national, some local and some bespoke research.

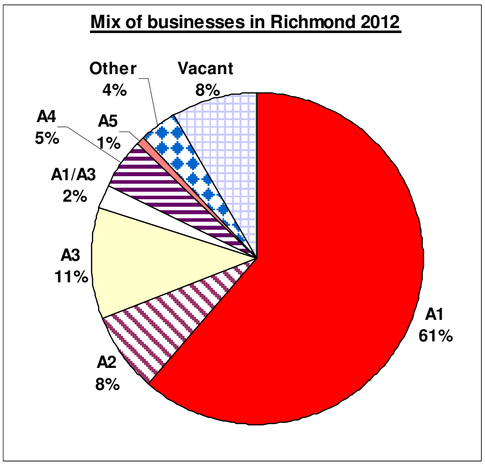
This report is particularly timely because of two key factors: the country is in recession and the retail sector is changing, perhaps fundamentally, particularly because of the growth of internet shopping. Nationally, the retail sector appears to be in decline, with rising vacancy rates and retailers going into administration a regular topic in the news. The government and other organisations have focussed attention on town centres. A key question is whether Richmond's centres reflect these national trends or are they more resilient to the changes than elsewhere.

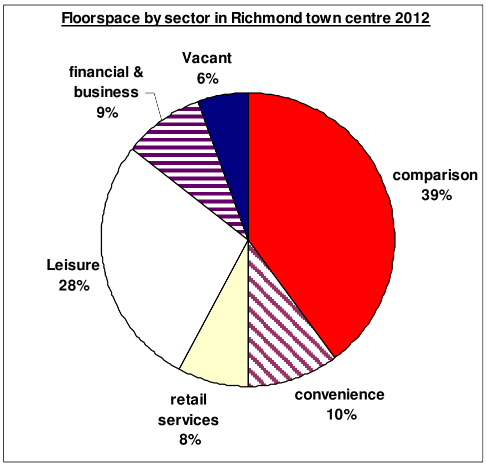
The number of shops in the borough's centres has fallen over the years, particularly in the food shopping sector, which is now more concentrated in supermarkets. Overall, Richmond's town centres compare well to the UK average, and Richmond town centre in particular shows good resilience. The picture is less clear for other centres such as East Sheen. It is positive that most centres have experienced falling vacancy rates between 2011 and 2012.

The main document is available on the Council's website on the LDF town centre research page:
http://www.richmond.gov.uk/home/environment/planning/planningpolicy/local_development_framework/local_development_framework_research/retail_study_march_2006.htm

Richmond town centre

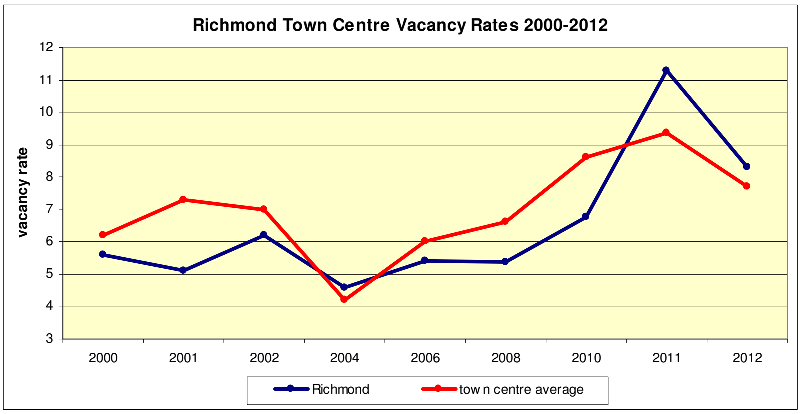


Indicator	Richmond town centre
Business mix and how it compares with UK average: 	Not unexpectedly the majority of the units are in retail use (61%), with a further 19% in the eating and drinking sector. The mix is similar to how it was in 2000, albeit that vacancy rates have fluctuated over this period. 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 most) 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 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. Benchmarking: Experian GOAD data compare centres to a hypothetical average. Whilst the comparison (non-food) retail sector amounts 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. Whilst cafes and takeaways are under-represented almost all other uses are over-represented, notably bars and restaurants. Looking more closely at sectors - The overall mix is largely in line with what might be expected from a centre of this size and role and where there is demand for retail. There are a number of specialist foodshops which are not represented in the centre. 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 & mens clothing again reflecting the role of the centre. Multiples: There are more multiples in Richmond town centre than elsewhere in the borough. Approaching half of units in the centre and two thirds of floorspace are operated by a multiple. 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). Charity shops: Only 1% of retail outlets in Richmond are charity shops, which reflects the overall level of demand for premises in the centre. Numbers are well-below the UK average.
Other benchmarking	• Colliers International classified Richmond as a "thriving centre", - only 18% of the centres were categorised in this top-performing category. • Research undertaken by CACI indicates that Richmond may be vulnerable to the trend of branch closures which further concentrate representation in the largest town centres. • Javelin Group paper identifies Richmond as in the "most robust" category in terms of the centre defending itself from long-term decline and remaining successful. • Javelin Group also produces an index which ranks UK shopping venues based on their retail offer. Richmond is ranked

<table>
<tr><th>Indicator</th><th>Richmond town centre</th></tr>
<tr><td></td><td>166 (2011) out of over 2,000 centre across the UK. It has improved its position from 2006, when it was ranked 166.</td></tr>
<tr><td>Floorspace

</td><td>The data 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.

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.</td></tr>
<tr><td>Businesses seeking space in the centre</td><td>South London Business database provides some information for all land uses on the number of property searches received. Richmond has had marginally more search requests than other areas in the borough and the figures are in line with the other major nearby centres of Sutton and Kingston.</td></tr>
<tr><td>Demand - Shopping rents : £225/ft 2</td><td>Richmond's estimated (Zone A) prime 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.</td></tr>
<tr><td>Vacancy rate of 8.3% in 2012</td><td>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.

Only 1% of units in the centre have been vacant for more than two years.

Latest estimates suggest UK or national vacancy rates of c.14%. Richmond compares well.

</td></tr>
<tr><td>How many UDP Proposal sites are unimplemented?</td><td>There has been substantial investment in the centre through environmental improvements. However, Richmond station, the key proposal site for the centre which is current adopted policy, remains unimplemented. This proposal is for major redevelopment of the Station and does not refer to the improvements to the entrance which are underway.</td></tr>
<tr><td>Completions and commitments</td><td>There has been a marginal overall loss in retail space in the last few years, although the majority of this has been ancillary retail floorspace. There are no significant commitments (planning permissions not yet implemented) outstanding in the centre (the Eton One development increases the amount of trading space, but</td></tr>
</table>

Indicator	Richmond town centre
	reduces the ancillary retail). There are commitments nearby including extensions to out of centre stores and the introduction of a smaller format Tesco store on Kew Road.
Retail capacity	Richmond town centre is expected to accommodate the bulk of the retail floorspace needed in the borough. The Core Strategy includes an indicative requirement of 8,000m2 net by 2017/18.
Pedestrian flows (footfall)	Results suggest that commuters account for significant amounts of footfall, although clearly, those using the station are not necessarily using the centre. High flows are also recorded outside Mars & Spencer on George Street. There may be opportunities for retailers who open longer. The exercise confirms the importance of the supermarkets in the centre, especially at lunch time. Richmond Hill site has consistently recorded the lowest pedestrian counts. In general, the latest estimated figures are lower than in earlier years. This particularly noticeable in Richmond, which was the only centre where inclement weather conditions were recorded at survey.
Accessibility & parking:	Richmond has very good public transport accessibility. It has 18 trains an hour and 12 bus routes pass through the centre. Car parking is providing at a number of car parks. The 3 largest surface car parks are 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. No recent data on car park occupancy is currently available.
Customer and residents' views and behaviour	The Council's All in One Consultation Results indicates 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%). 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%).
Anti-social behaviour	Richmond and Twickenham recorded the most ASB of any of the centres, although it is mainly reporting of litter and noise, centring on George Street and Hill Street. Actual crime is relatively low in the Borough, although is higher here than in other centres. Total crime figures have increased if you compare the first quarter of 2011/12 with 2012/13.
State of the town centre: environmental quality	The Full Report on this Issue is published separately. Richmond has a significant amount of high quality open space and is rich in historic assets. It is fully covered by Conservation Area designation. Due to its urban nature air quality targets are exceeded in most locations. The town centre is divided in to 8 areas for which there are detailed descriptions, although in general environmental quality is good although some areas are affected by noise and are heavily trafficked.

Summary:

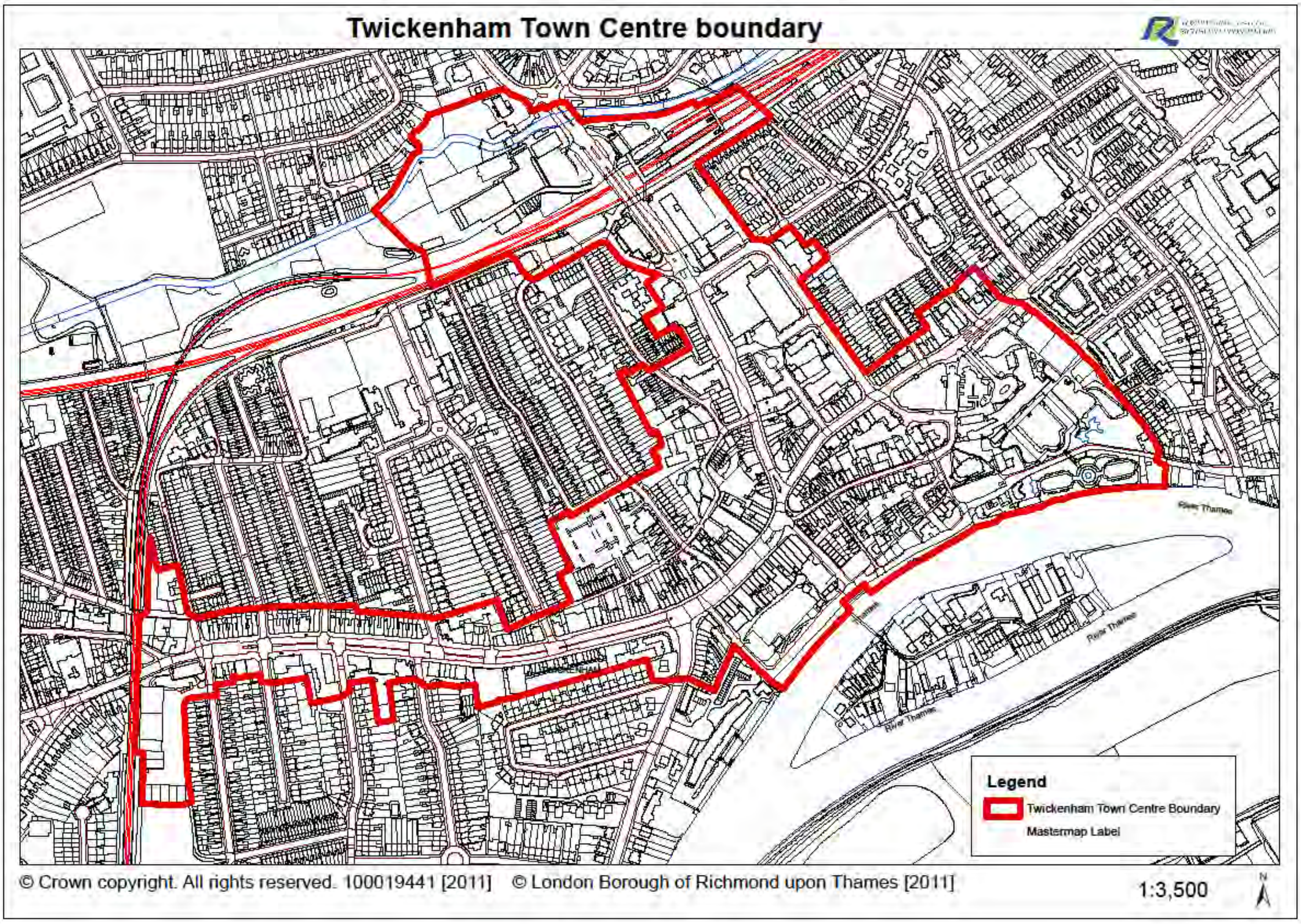
Richmond's role as a sub-regional centre providing comparison shopping is illustrated by the considerable amount of floorspace in non-food shopping, its mix and the type of businesses present. The rise in retail vacancies has been explained in part by redevelopment, but the very recent decline in vacancy 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.

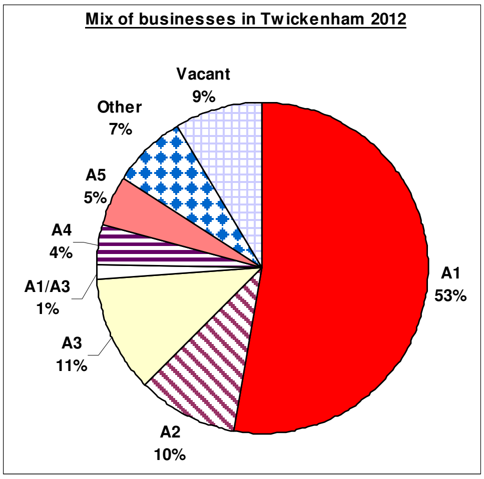
It is expected that the majority of forecast retail capacity will be accommodated here, and it is hoped that the comprehensive development of the station site and others which come forward will help retain the centre's position and keep the shopping spend in the borough.

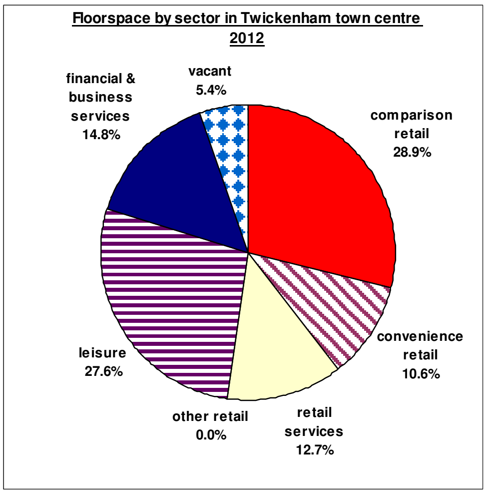
However, there appears to be lower footfall than in the past and retailers face a very competitive environment in tough economic times, particularly from the growth in e-tailing. The need to monitor the economic health of the centre, and to ensure a good balance of shopping to other businesses is critical,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

Twickenham town centre

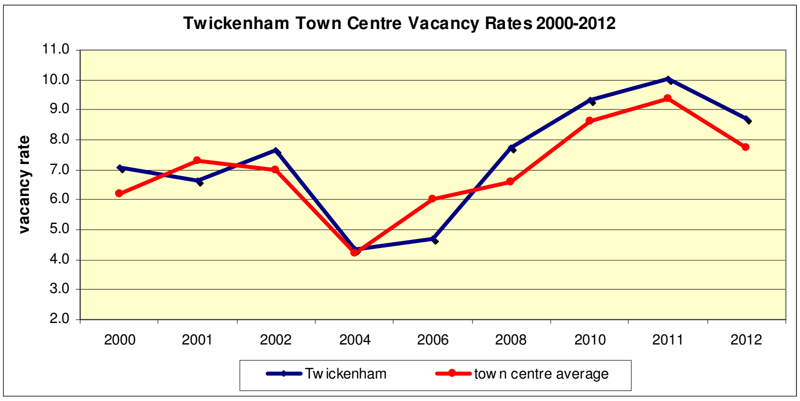


Twickenham town centre

Indicator	Twickenham
Business mix and how it compares with UK average:  Source: LBRuT Town Centre Land Use Survey 2012 (land use, percentage of outlets)	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. Numbers of shops remain fairly constant and have been rising since the peak in 2006. However, diversification has occurred in the centre as other data shows. Businesses in the "other"/ miscellaneous category have declined by comparison and a number of new retail units have been built on Heath Road. Twickenham 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. Therefore, 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. **Benchmarking:** Experian GOAD data compare centres to a hypothetical average. 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. Looking more closely at **sectors** - Since 2005 the number of food shops has fallen from 27 to 23 in 2012. However, Twickenham has a good range and is unusual in retaining a fishmongers. 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. 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. GOAD data confirms 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. 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) where there has been notable growth.

Indicator	Twickenham
	Multiples: According to Experian GOAD there are 77 multiple outlets in Twickenham, which amounts to 186,400 ft2 (c 17,300m2) of floorspace. Numbers have declined since 2009. Approximately a third of shops (outlets) are multiple retailers. **Charity shops:** 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.
Other benchmarking: Colliers Town Centre Performance Matrix	• Colliers International classified Twickenham as an "improving centre" - only 20% of the centres were categorised in this category. [Categories are thriving - (Richmond), Improving, Stable, Degenerating (East Sheen) & Failing]. • Javelin Group paper identifies Twickenham as in the "most robust" category in terms of the centre defending itself from long-term decline and remaining successful.
Floorspace 	2012 Experian GOAD floorspace estimates by sector are included in Table 4. 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.
Businesses seeking space in the centre	South London Business database provides some information for all land uses on the number of property searches received. Twickenham compares favourably with statistics for other centres in Outer London.
Demand - Shopping rents : £70/ft 2 © copyright Colliers International	Colliers International 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. Anecdotal information supplied by local agents suggests this figure may be slightly high. Reasonable demand exits in King Street and London Road, but not generally from multiples.
Vacancy rate of 8.7% in 2012	2011 rates were higher than for a decade, although since 2011 have dropped again to 8.7% in 2012 (by 30 to 26 units). Of the five main centres only Whitton has a higher vacancy rate. 60% of vacant units in Twickenham are empty shops. 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. As with Richmond, it may be that much of the diversification from shopping has occurred prior to 2000. Numbers of shops remain fairly constant and have been rising since the peak in 2006. Of

Indicator	Twickenham
	those vacant in 2012 60% are shops and 30% entertainment uses. Experian estimate there was 2,500m2 of vacant floorspace in the centre in 2012, which is c5% of total floorspace. In July 2012 there were 7 units which had been vacant for over 2 years, some of which are subject to planning applications.



Indicator	Twickenham
How many UDP Proposal sites are unimplemented?	There has been substantial investment in the centre through environmental improvements and a number of key sites are expected to be developed in the short term including the Station and Post Office Sorting site. The Twickenham Area Action Plan, expected to be adopted in the Summer, updates proposal sites within the town centre boundary.
Completions and commitments	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 continues to diversify. Only one completed development has added floorspace, which was minimal. There are two commitments in the pipeline, although still relatively modest if looking at the wider picture.
Retail capacity	Twickenham has a negative food shopping requirement and its allocation in the adopted Core Strategy is a modest 400m2. Therefore the strategy is aimed at only limited new provision and consolidation of existing shopping provision, with encouragement for specialist shopping.
Pedestrian flows (footfall)	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. Footfall on Heath Road near the Tesco Express appears to have improved since its opening. However, overall is down compared to 2006.
Accessibility:	
Customer and residents' views and behaviour	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

Indicator	Twickenham
	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
Anti-social behaviour	Richmond and Twickenham recorded the most ASB of any of the centres, although it is mainly reporting of litter and noise, centring on York Street/ London Road/ King Street intersection and the western end of Heath Road. Actual crime is relatively low in the Borough, although is higher here than in other centres. Total crime figures have increased if you compare the first quarter of 2011/12 with 2012/13. Data on alcohol-related offences also suggest a rise.
State of the town centre: environmental quality	The Full Report on this Issue is published separately. Twickenham is well-provided for in terms of open space and is rich in historic assets. As with Richmond, due to its urban nature air quality targets are exceeded in most locations. The town centre is divided in to 8 areas for which there are detailed descriptions, although in general environmental quality is good although some areas are affected by noise and are heavily trafficked. Townscape is particularly good in Church Street. Parts of the centre have benefited from environmental improvements (for example Heath Road, parts of the Embankment), leaving some parts of Twickenham (including the core area) looking less attractive by comparison. The Holly Road area fairs less well in the assessment.

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. 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".

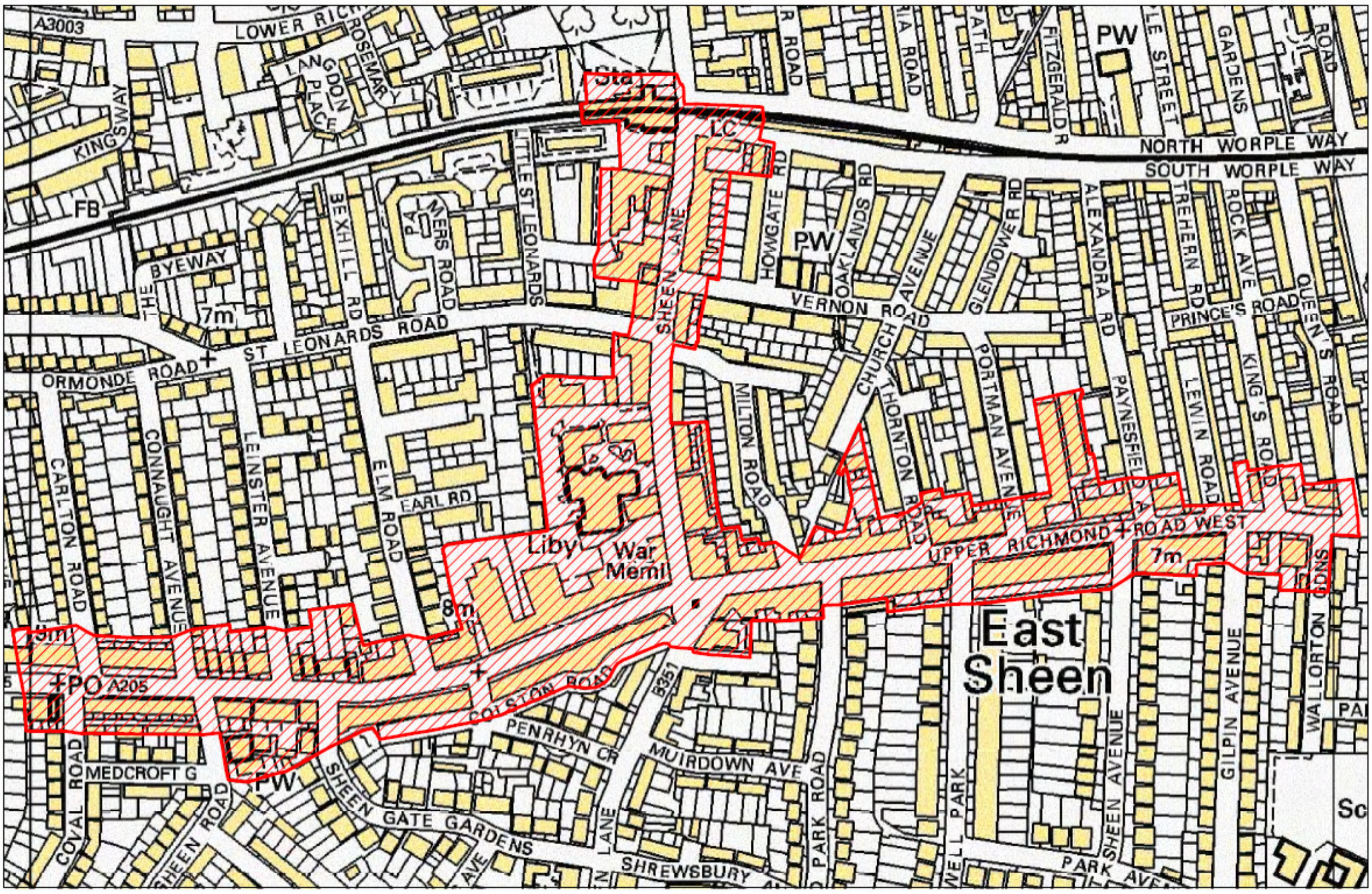
Whilst some indicators might suggest guarded optimism, others are less positive. Footfall appears to be falling, certainly in parts of the centre, whilst rising elsewhere. Although crime is relatively low on a regional scale, it is high compared to other borough centres. Much of the anti-social behaviour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

East Sheen town centre

East Sheen Town Centre boundary



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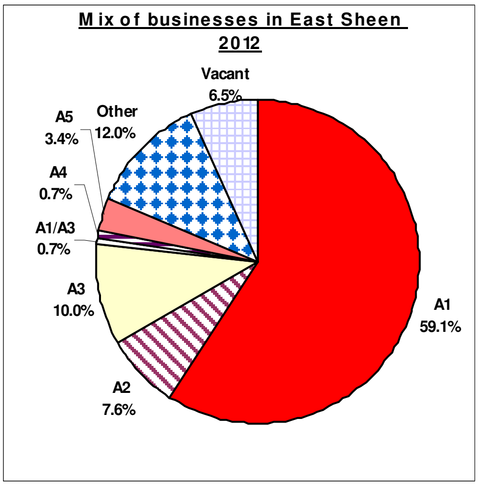
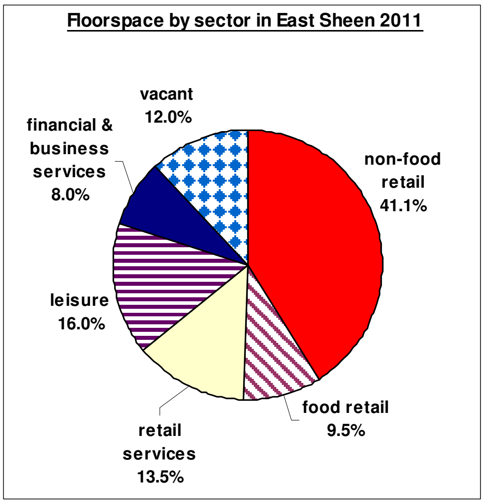
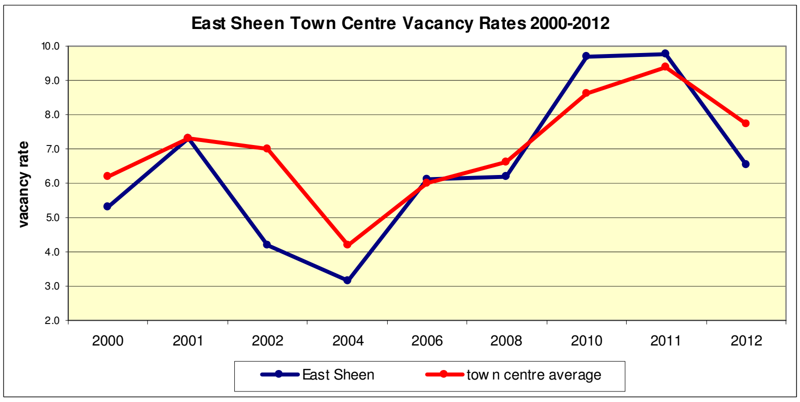
East Sheen town centre

Indicator	East Sheen
Business mix and how it compares with UK average:  Source: LBRuT Town Centre Land Use Survey 2012 (land use, percentage of outlets)	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 number of shops in East Sheen has fluctuated over the last decade or so. 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 and doesn't 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. Benchmarking: Experian GOAD data compare centres to a UK average town centre. 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. Food shopping - Since 2005 the number of food shops has fallen significantly from 22 to 14 in 2011. 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. Multiples: East Sheen had 52 multiple outlets in 2011, 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 2011 23% of outlets were occupied by a multiple. The same proportion of retailers were multiples. The data suggest a strong independent comparison retailer offer which helps to differentiate East Sheen from its competition.
Other benchmarking: Colliers Town Centre Performance Matrix	• Colliers International classified East Sheen as a "degenerating centre" - 10% of the centres were categorised in this category. [Categories are thriving - (Richmond), Improving (Twickenham), Stable, Degenerating (East Sheen) & Failing]. • Javelin Group paper identifies East Sheen as in the "most robust" category in terms of the centre defending itself from long-term decline and remaining successful.

Indicator	East Sheen
	Clearly there are conflicting views.
Floorspace 	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. 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.
Demand - Shopping rents : £50/ft 2 © Colliers International	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.
Vacancy rate of 6.5% in 2012	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. 
How many UDP Proposal sites are unimplemented?	Work on potential new proposal sites in the area is currently underway. The only proposal site in the town centre boundary, the BR station, has been implemented.
Completions and commitments	East Sheen is one of few centres, where there has been a noticeable increase in both gross retail floorspace and retail sales area. However, there is little retail development in the pipeline.
Retail capacity	Research shows much of the capacity for retail arises in the east of the borough, primarily in Richmond town centre. East Sheen has a need for some food shopping and a very small amount of non-food shopping floorspace also. The Core Strategy includes an indicative requirement of 1,100m2 net by 2017/18.
Pedestrian flows (footfall)	East Sheen has a relatively even pattern of footfall across the day, with the highest levels recorded at the afternoon count (4-5pm). It is not a major office location and doesn't have a distinct lunchtime peak. As elsewhere higher footfall levels are found adjacent to the main supermarket (Waitrose), and to a lesser extent at the intersection of the main shopping street and Sheen Lane. Lowest footfall is recorded on the western periphery. Rough estimates of overall levels suggest a decline in footfall from

Indicator	East Sheen
	2000, although more frequent monitoring would be needed to confirm this as a real trend.
Accessibility:	
Customer and residents' views and behaviour	The Council's All in One Consultation revealed that 33% of respondents felt that good local shopping was an important factor in making East Sheen a good place to live. A number of other factors including access to parks were identified by greater numbers. Improvements to shopping being needed was not in the top 5 things "most needed".
Anti-social behaviour	East Sheen as less ASB than Richmond and Twickenham but more than some of the other districts. The key issue appears to be littering on the Upper Richmond Road West, which could be related to the relatively large take-away offer in the centre. Actual crime is too low to be reported.
State of the town centre: environmental quality	The Full Report on this Issue is published separately. East Sheen as defined by the town centre boundary is poorly provided for in terms of open space. However, as the All in One consultation exercise suggests, Richmond Park is nearby and is clearly valued by residents. Parts of the centre exceed air quality standards, and the level of traffic in the centre is clearly a factor which affects its environmental quality. Mortlake station and it surrounds has the poorest environmental quality in the centre. There are some environmental improvements to Milestone Green planned.

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.

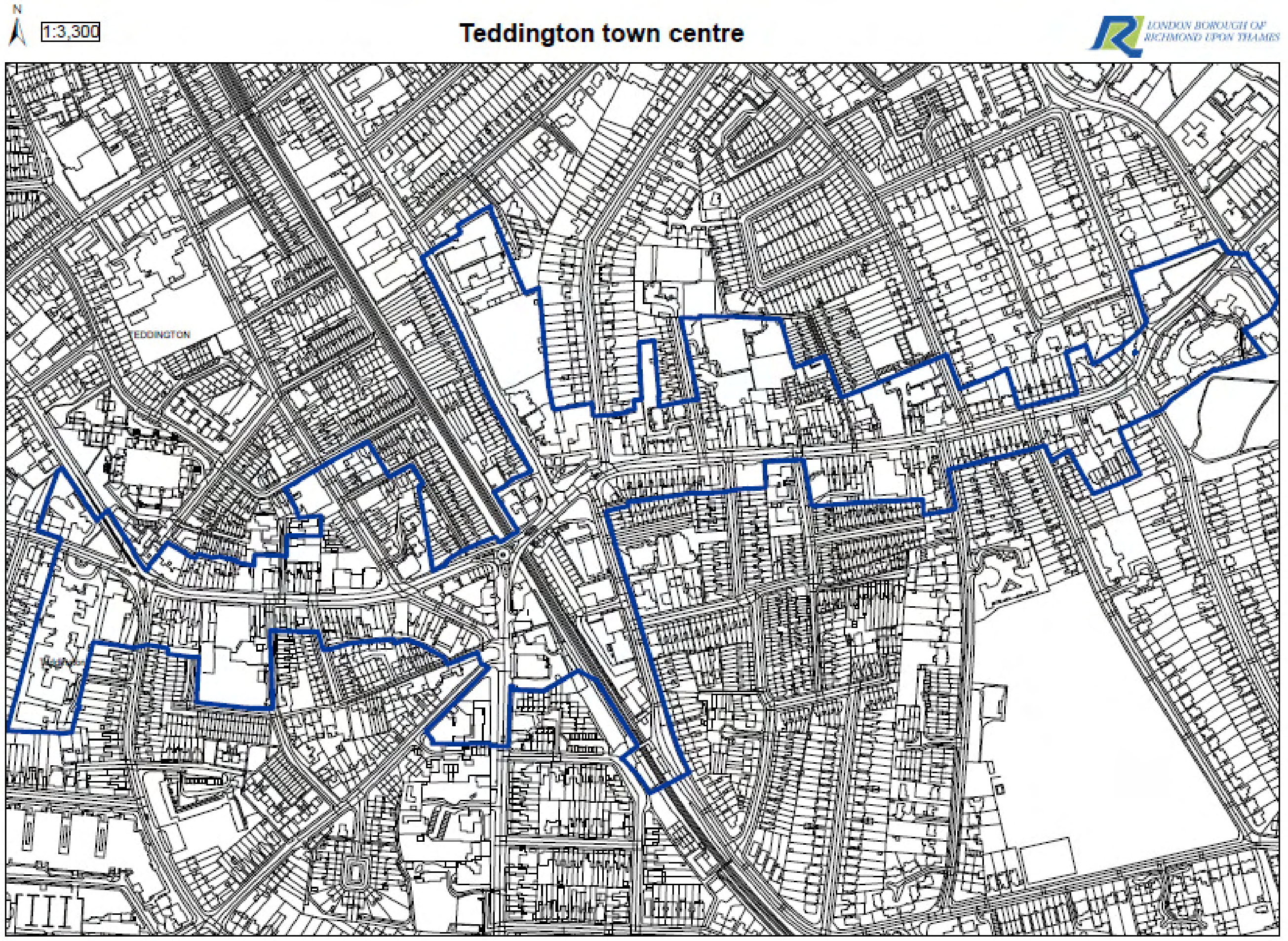
East Sheen has approximately 35,000m2 of floorspace in total. It has a less-well developed food & drink offer than some of the other districts, which is mainly restaurant based, and to a lesser extent café-based, both growing sectors. It also a strong take-away sector of 1,000m2 floorspace, the amount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

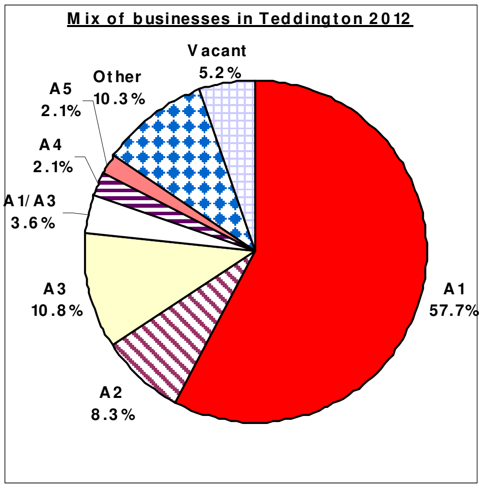
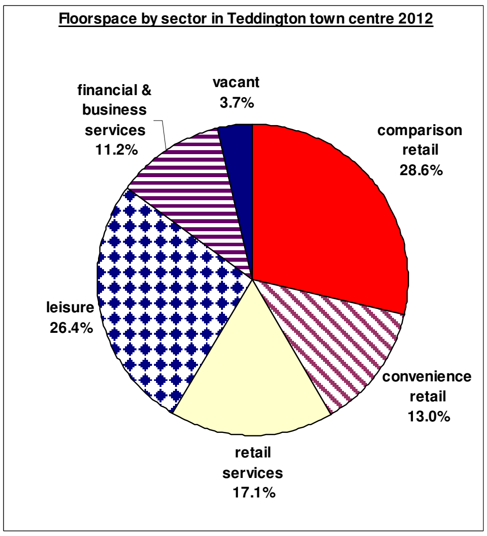
Some signs are less positive, prime rents have declined slightly between 2011 and 2012 and are noticeably below Twickenham's, footfall is lower than previously recorded, although more frequent monitoring would be needed to confirm this as a real trend. Whereas the Javelin Group put the centre in the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

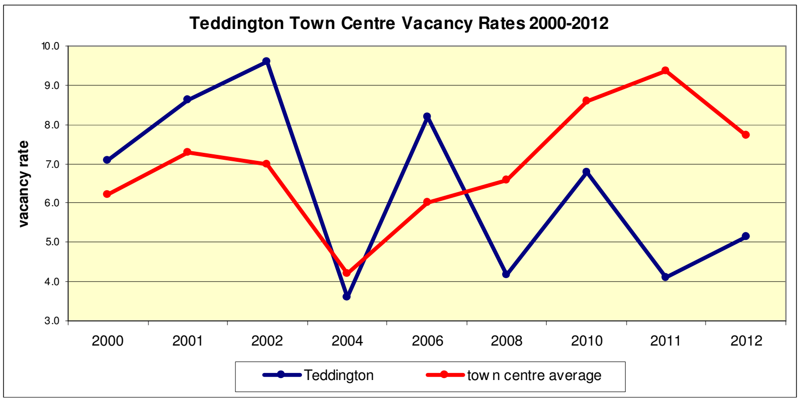
Town centre indicators suggest a mixed picture for East Sheen with perhaps some degree of vulnerability. Very recent data on growing shop numbers and falling vacancy rates are positive. East Sheen's role as a comparison goods shopping centre is clearly an important one and the fact that this is a growing 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.

Teddington town centre



Teddington town centre

Indicator	Teddington
Business mix and how it compares with UK average:  Source: LBRuT Town Centre Land Use Survey 2012 (land use, percentage of outlets)	Teddington is a district centre with a primarily local role. 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 overall number of shops in the centre (112) has remained stable for the last 5 years. Benchmarking: Experian GOAD data compares centres to a UK average. Whereas the number of shops in Teddington is similar to the UK average, the amount of comparison goods shopping floorspace is under-represented, reflecting the size of shops in the centre. Numbers of comparison goods shops in the centre have fallen between 2005 and 2011. With approx 13,100 m2 of retail floorspace, it is the second smallest district centre (Whitton being the smallest). Teddington is under-represented in terms of *supermarket* floorspace compared to the UK average. Teddington is an established venue for eating out and drinking. Its offer is more diverse than in other district centres being more evenly spread between the restaurant, café, wine bar & pub sectors, with the exception of the take-away/fast food sector which is more limited. Multiples: 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 for comparison goods retailing in Teddington which no doubt adds to its charm and success as the centre has a strong anchor and a stable and affluent population. Charity shops: Teddington had 7 charity shops in 2012 which is 6.3% of all shops in the centre. Figures are low compared to other borough centres.
Other benchmarking	Javelin Group research identifies Teddington as in the "most robust" category in terms of the centre defending itself from long-term decline and remaining successful.
Floorspace 	There is an estimated 31,500m2 of floorspace in Teddington (2011), marginally smaller than East Sheen. Of the retail floorspace, c.9,000 m2 is comparison floorspace and 4,100 convenience floorspace.
Demand - Shopping rents	Data from a national source is not available. However, anecdotal data suggests rents achieved are between £25-£60 per sq ft, depending on location in the centre. In Teddington, there is a good mix of shops and an affluent market with the High St and Broad St

Indicator	Teddington
	doing well.
Vacancy rate of 5.2% in 2012	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%. 
How many UDP Proposal sites are unimplemented?	Of proposal sites which are currently adopted policy, the Station site is unimplemented, as is the scheme to pedestrianise the Causeway. However discussions are underway regarding the latter. The library extension has been implemented, as has the rebuilding of the Queen's Road clinic.
Completions and commitments	There has been an overall increase in retail completed floorspace in Teddington in the last 5 years, although taking into account losses, this amounts to an increase in retail sales space of only c.150m2, which is small.
Retail capacity	Research indicates capacity for 1511 m2 net for convenience (food) floorspace and for comparison (non-food) goods, a much lower estimated capacity of just 95m^2 in 2016. Overall, this translates as an indicative very modest requirement for 300m2 net by 2017/18 set out in the adopted Core Strategy[1].
Pedestrian flows (footfall)	The monitoring site outside of 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. The lowest footfall is recorded at the two sites on the Causeway in both 2006 and 2012, which is also the location of the two long-term vacants in the centre. 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, there is a discernible peak in numbers at the Tesco site at lunchtime which could be linked to the sizable workforce in the area. Footfall has not fallen in Teddington as it has in other centres.
Accessibility:	
Customer and residents' views and behaviour	The Council's All in One Consultation Results indicates that local shopping is considered by nearly 40% of locals as contributing to why Teddington is a good place to live. Only "local parks and open spaces" was ranked more highly. Shopping was not identified as most needing to be improved.
Anti-social behaviour	Actual crime in Teddington ward is low compared to Richmond and Twickenham, but higher than in other district centres. Teddington has low levels of anti-social behaviour reporting which is mostly concerned with litter and noise.

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

Indicator	Teddington
State of the town centre: environmental quality	The Full Report on this Issue is published separately. Teddington is generally assessed as having a high quality public realm.

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 can 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.

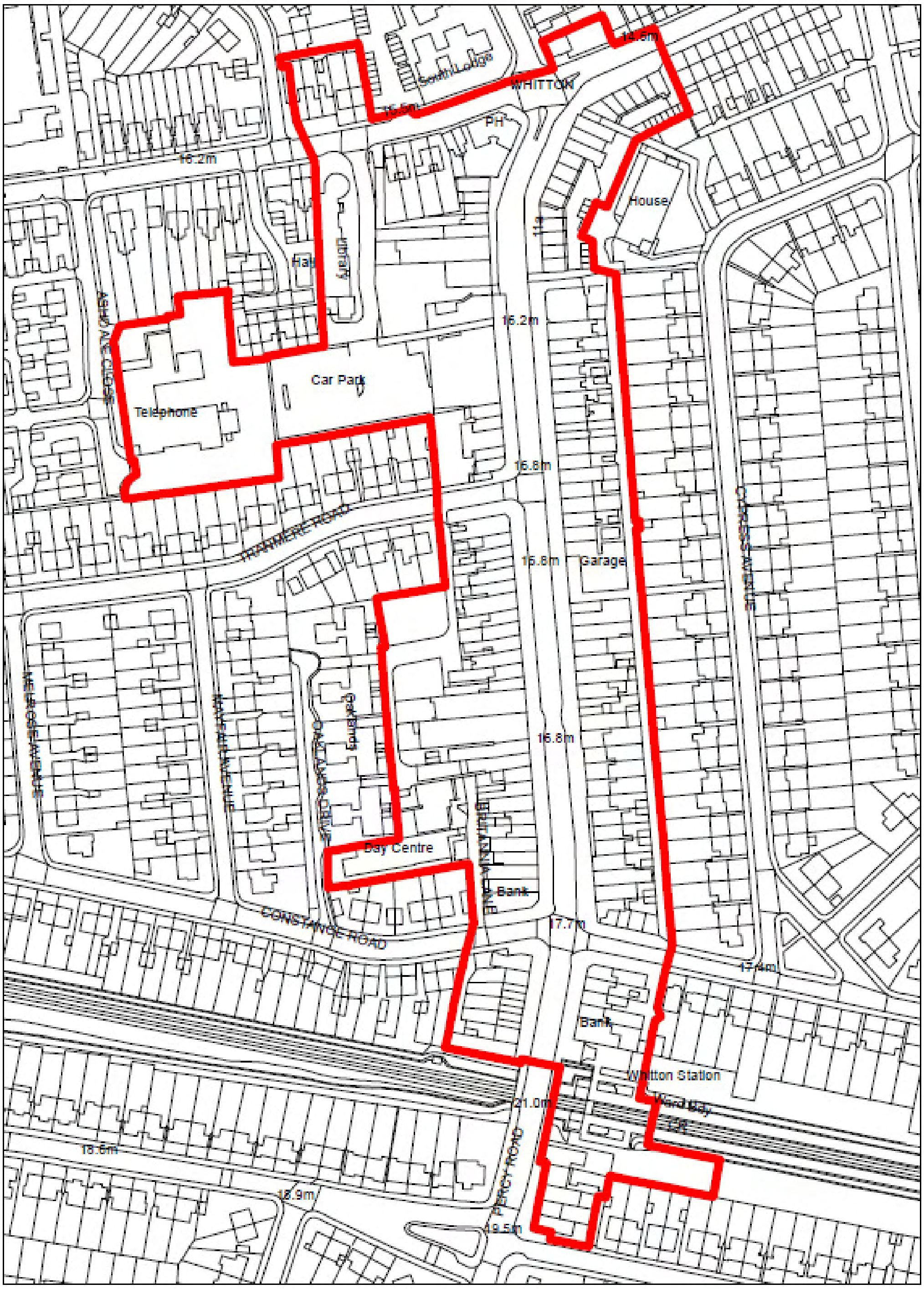
Community facilities have been improved in Teddington as proposal sites have been implemented. Figures show that the overall amount of completed retail floorspace has not significantly increased in the last 5 years. There is some limited capacity for retail growth and a very modest allocation in the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

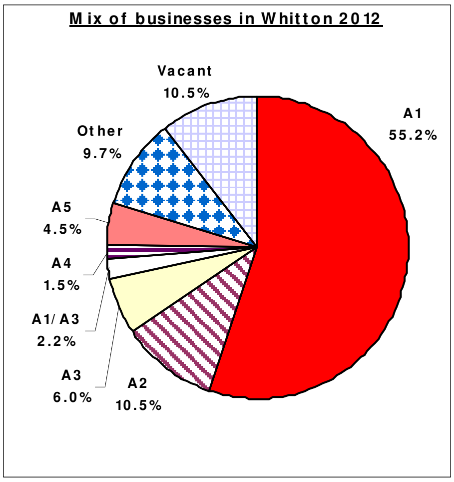
Whitton town centre

Whitton district centre



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

Whitton town centre

<table>
<tr><td>Indicator</td><td>Whitton</td></tr>
<tr><td>Business mix and how it compares with UK average:


Source: LBRuT Town Centre Land Use Survey 2012 (land use, percentage of outlets)</td><td>Whitton's mix of businesses differs from the town centre average[2] in the borough, in that 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, and "other uses" (which includes the miscellaneous land use class, offices etc). This pattern reflects its local role. Vacancy levels are higher in Whitton than in the other district centres in the borough. They have fluctuated over the years but have been higher in the past than they currently are. Whitton is by far the smallest of the district centres with approximately 12,300m2 of total floorspace of which 5,800m2 is shopping. It has less shopping floorspace than Barnes local centre, and approximately a third of what is available in East Sheen and Teddington.

A key consideration is whether the overall number of shops has changed. In line with other 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. Numbers of businesses in the food and drink sector have increased steadily over the period. Although not as diversified as other districts, there has nevertheless been some diversification, notably an increase in cafés.

Benchmarking:
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 Lidl store has opened since the last GOAD Survey and thus food shopping provision has further increased and choice improved. 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, (although not large in quantity).

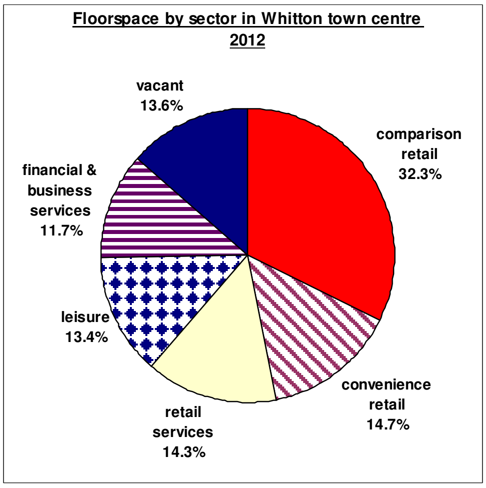
Whitton is well-provided for in terms of retail services which includes health & beauty and opticians. Leisure services are significantly under-represented, although within this sector betting offices and cafes are well-represented.

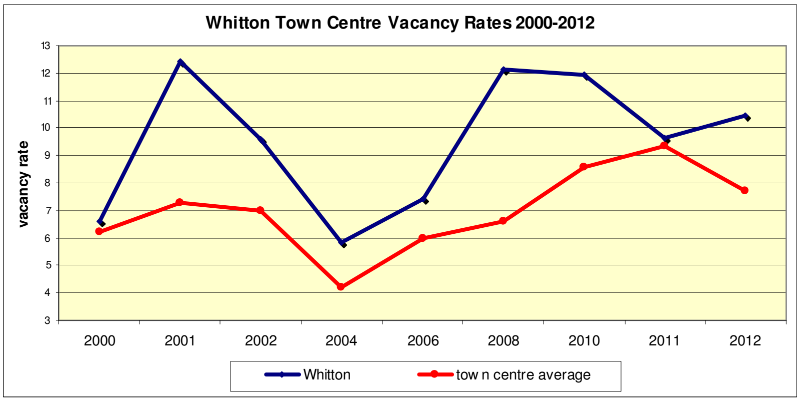
If we compare the latest data (2011) with the 2005 dataset there is a discernible loss of food retailers, and the centre no longer has a fishmonger or greengrocer. The number of food shops has fallen from 14 to 9 between 2005 and 2011.

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. Retail closures have been across a range of sectors, mainly independents. There are new retailers in the centre, but far fewer than closures.

Multiples: According to Experian GOAD there are 29 multiple outlets in Whitton (2011), which amounts to c.4,300m2 of floorspace. The number of multiple outlets in Whitton is significantly lower than in the other districts and more on a par with Barnes.</td></tr>
</table>

[2] Average of 5 main centres: Richmond, Twickenham, East Sheen, Teddington and Whitton.

Indicator	Whitton
	Charity shops: 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.
Other benchmarking	The Javelin Group produces an index (Venuescore) 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.
Floorspace 	It is estimated that there is 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.
Businesses seeking space in the centre	Data n/a
Demand - Shopping rents : n/a	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.
Vacancy rate of 10.4% in 2012	With a vacancy rate of 10.4%, Whitton has the highest rate amongst the district centres, and with the exception of Teddington (where increase was from a low base), is the only centre where the vacancy rate increased from the previous year, albeit marginally. The vacancy rate remains below the UK average. 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. Only 3 units in the centre were long-term vacants (vacant for over two years or more), two of which were vacant A2 units.

Indicator	Whitton
	
How many UDP Proposal sites are unimplemented?	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 redevelopment) is considered likely to be started this year.
Completions and commitments	The redevelopment of the former Co-op store to accommodate a Lidl supermarket and the minor extension of two other A1 uses in the High Street has resulted in a marginal increase in retail floorspace in Whitton. Planning permission has been granted for a retail development of 460m2 at 53-55 High Street.
Retail capacity	Whitton has very limited capacity for either food or non-food shopping floorspace, although it was noted by the Council’s consultants that an appropriately sized store could help to retain shopping spend in the area. Since the report was written the Lidl store has opened and there is further modest provision in the pipeline. The Core Strategy includes an indicative modest requirement of 600m2 net by 2017/18.
Pedestrian flows (footfall)	Highest footfall is consistently recorded at the Tesco monitoring site. The centre is less busy in the evening, although data suggests evening counts have increased slightly since 2006. Whitton’s overall level of footfall is not significantly different from 2006, but lower than when earlier surveys (2000 & 1997). 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, although it remains the busiest location.
Accessibility:	Whitton town centre has a Public Transport Accessibility Level (PTAL) score of 3, which is considered moderate. It has good train connections.
Customer and residents’ views and behaviour	The Council’s All in One Consultation indicated that Whitton residents valued their High Street shopping with almost a half of respondents considering it as important in making Whitton a good place to live. However, despite this, almost the same percentage felt that improvements to shopping in the High Street were needed.
Anti-social behaviour	Whitton has low levels of reporting of Anti Social Behavour, which is primarily complaints about litter. Actual crime is so low that figures are confidential and not released.
State of the town centre: environmental quality	The Full Report on this Issue is published separately. The majority of the town centre is within an Area poorly provided with Public Open Space. The area around Whitton Station, for which there are redevelopment plans, is considered poor quality. The High Street area is considered pedestrian-friendly, although impacted by traffic. There has already been investment in this area and a major street scene improvement project is underway. The third area assessed

Indicator	Whitton
	including the Library and car park was also considered poor.

Summary

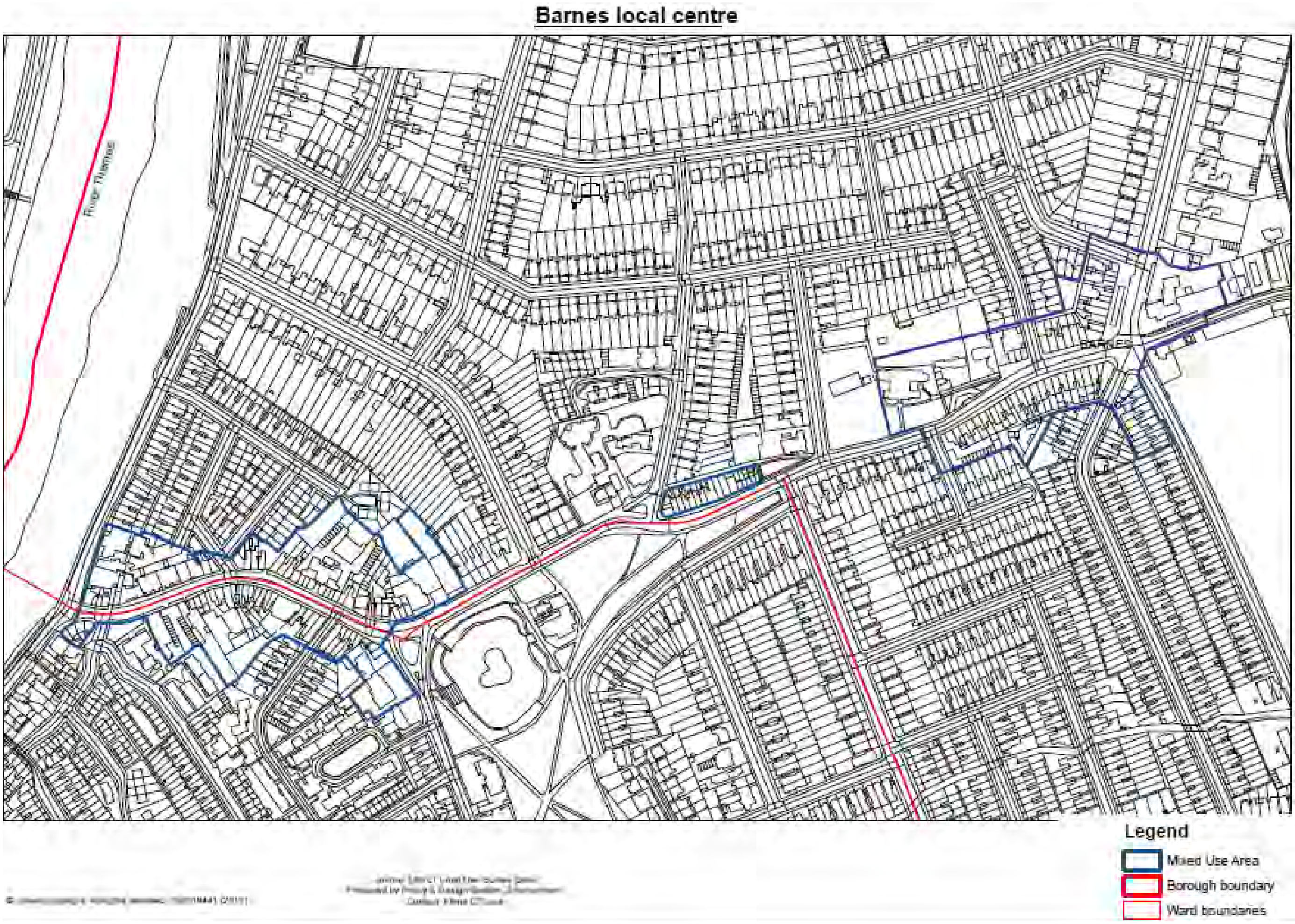
Clearly Whitton is the smallest of the district centres with a food shopping, but relatively limited comparison shopping, role. Food shopping provision is similar to the UK average. Of note is that comparison shopping appears to be on the decline, with numbers of retailers falling across a variety of 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.

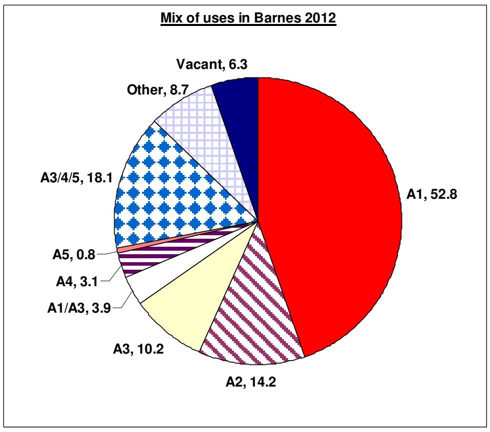
Looking to the future there have been a number of positive developments with the opening of the Lidl store in the former Co-op building which had been underused or vacant for many years. Planning permission has also been given for a retail unit on the former car showroom at 53-55 High Street, which may 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.

Barnes local centre



Barnes local centre

<table>
<tr><th>Indicator</th><th>Barnes</th></tr>
<tr><td>Business mix and how it compares with UK average:



Source: LBRuT Town Centre Land Use Survey 2012 (land use, percentage of outlets)</td><td>If we compare Barnes to other local centres such as Hampton Hill, Hampton Village and St Margarets, it has a greater proportion of A2 uses (financial sector, in this case estate agents) and A3 uses (cafes and restaurants). Conversely it has a smaller proportion of A1 outlets (shops and retail service e.g. dry cleaners and opticians) and “other” uses (including the miscellaneous use class category, office, etc).

Barnes had 67 A1 units in 2012, and in common with other centres in the borough this number has fluctuated over the last decade or so. On the whole, numbers are considerably lower than it has been in the past and are at their lowest over this period.

There are increasing numbers of cafes and estate agents. Barnes has a well-established restaurant sector comprising 1,500m2 of floorspace.

The most significant change is rise in the number of vacant units, although rates remain well below the UK average.

Benchmarking: If we compare Barnes to the “UK average town” using GOAD data, Barnes is well-represented in terms of leisure and financial services.

If we consider retailing, Barnes is not likely to be considered a major comparison shopping destination, with an estimate 5,300m2 in 2011, but is not dissimilar to the UK average. It has more comparison retailers than Whitton, but a smaller food sector. 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. There is also an outstanding planning permission for a retail unit of Barnes High Street which if implemented is likely to be occupied by a major food retailer.

GOAD figures show declining numbers of shops between 1999 and 2011. Nevertheless, Barnes is one of the few local centres which has a full range of what the Council considers to be key shops and services.

Barnes has far more estate agents than the average UK town.

Multiples: Barnes has 28 multiple outlets – 4,100m2 of floorspace. It has smaller numbers than the other centres, with the exception of Whitton where numbers are similar. Only 19% of shops are multiples in Barnes which is also low compared to other larger centres. Barnes has a strong independent retail sector, which adds to the centre’s charms and caters for its largely affluent population.

Charity shops: Barnes had 3 charity shops in 2011, which is in line with the UK average.</td></tr>
<tr><td>Floorspace</td><td>It is estimated that Barnes had c.16,000m2 of retail floorspace in 2011 of which 5,300m2 is comparison floorspace and 1,200m2 is convenience floorspace. The amount of retail floorspace in Barnes</td></tr>
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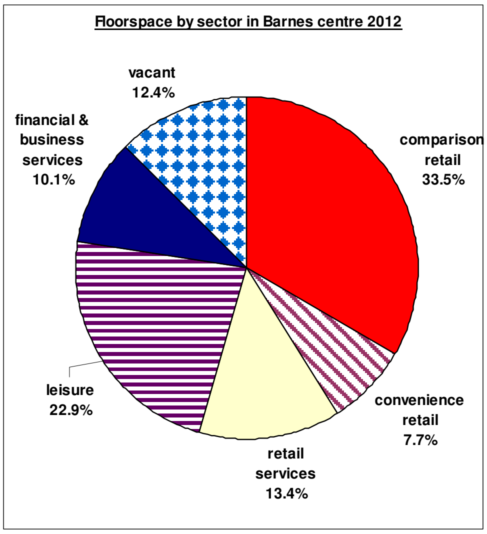
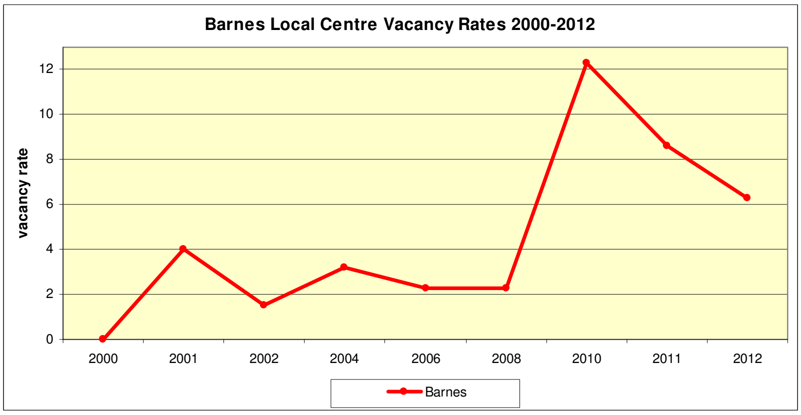
<table>
<tr><th>Indicator</th><th>Barnes</th></tr>
<tr><td>


</td><td>is similar to Whitton, but significantly less than the larger borough centres.</td></tr>
<tr><td>Vacancy rate of 6.3% in 2012</td><td>
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%. Vacancy rates are well below the UK average.


In 2012 there were 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 has had a change of use refused.
</td></tr>
<tr><td>How many UDP Proposal sites are unimplemented?</td><td>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. More sites may well emerge as part of the Site Allocations DPD process which is underway.</td></tr>
<tr><td>Completions and commitments</td><td>There has been some limited alteration to shops in the high street, usually small losses to the rear. However, the significant change has been the increase in the store now occupied by Sainsburys local. There is also an outstanding permission for a retail unit, potentially a supermarket, on a site off Barnes High Street.</td></tr>
<tr><td>Retail capacity</td><td>The Retail Study commissioned by the Council and produced by GVA Grimley produced forecasts of capacity for the 5 main centres only. There is no retail allocation for Barnes in the Core Strategy which seeks to steer major development into the 5 main centres. However, modest development would be acceptable in Barnes provided the scale were in line with the size and function of the centre.</td></tr>
</table>

Indicator	Barnes
Pedestrian flows (footfall)	Footfall is spread fairly evenly across the centre and this may be linked to the size of the daytime population which is relatively small compared to other larger centres. Counts undertaken by the Town Centre Manager reveal that pedestrian numbers are markedly higher on Saturdays, as would be expected.
Accessibility:	
Customer and residents' views and behaviour	The Council's All in One Consultation indicated that shopping in the High Street is valued by residents, that 39% of respondents identified it as one of the most important reasons why they liked living in Barnes. Nevertheless a quarter felt that there was room for improvement.
Anti-social behaviour	The overall message is that reports of Anti Social Behaviour in Barnes is low, both compared to a regional and borough picture and the key issue is littering. Actual crime levels are too low to be released.
State of the town centre: environmental quality	The Full Report on this Issue is published separately. Barnes has open space available nearby and many historic assets. Barnes has the best air quality of the other centres. Barnes has been assessed as having very high environmental quality. In parts of the centre the recent improvements to the public realm are noticeable.

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.

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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:

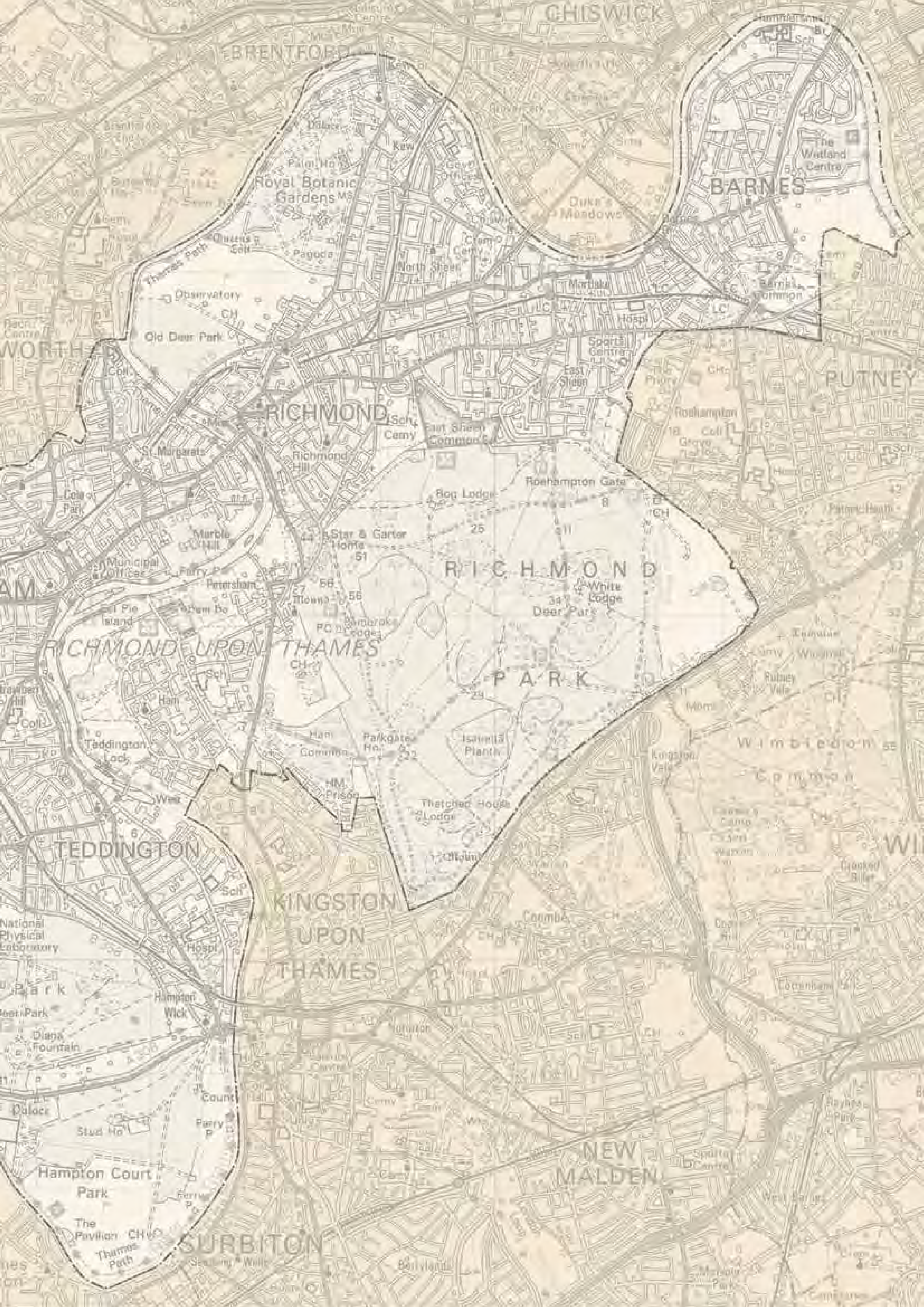
Farsi

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
Palm Ho
Pagoda
Kew
North Sheen
Duke's
Meadows
BARNES
The
Wetland
Centre
Mortlake
Barnes
Common
Observatory
Old Deer Park
Thames Path
RICHMOND
Richmond
Hill
East
Sheen
East Sheen
Common
Sports
Centre
PUTNEY
Roehampton
Roehampton Gate
Bog Lodge
St Margarets
Marble
Hill
Municipal
Offices
Petersham
Star & Garter
Home
RICHMOND
White
Lodge
Deer Park
PARK
RICHMOND UPON THAMES
Pembroke
Lodge
Ham
Teddington
Lock
Ham
Common
Parkgate
Ho
Isabella
Plantn
HM
Prison
Thatched House
Lodge
Weir
TEDDINGTON
Wimbledon
Common
Kingston
Vale
KINGSTON
UPON
THAMES
Coombe
National
Physical
Laboratory
Hospl
Hampton
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