

Richmond upon Thames Retail and Leisure Study Update Addendum

London Borough of Richmond upon Thames

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1.0 Introduction

- 1.1 Lichfields was commissioned by the London Borough of Richmond upon Thames (LBRuT) to prepare the Retail and Leisure Needs Study, which was completed in two phases in July 2021 (Phase 1) and January 2023 (Phase 2).
- 1.2 This Addendum report provides a partial update of the Phase 2 study, relating to Section 4: Retail and food/beverage need assessment. This Addendum report should be read alongside the Phase 1 and Phase 2 reports.
- 1.3 This Addendum also uses the GLA 2020-based projections, rather than the interim 2021-based projections, which are considered to be the most accurate at the current time for the purposes of forecasting future retail needs. The GLA has advised that the interim projections are subject to data limitations and may well be revised. This is in part due to the on-going review of the official annual estimates following the 2021 Census. In addition, the COVID 19 pandemic and Brexit have had huge and atypical impacts on migration patterns which are not fully taken into account by these projections. However, some sensitivity testing has been undertaken using the 2021 housing-led projection – identified capacity scenario. This scenario sits in the middle of the three housing-led projections produced by the GLA and is higher than the 2020 GLA estimates. Using this higher projection, in 2034 the amount of gross under-supply is forecast to be only marginally higher compared to the 2020 projections. It is considered that the difference is not sufficiently significant to suggest consideration of an alternative policy approach, even if the 2021 projections could be fully relied upon.
- 1.4 The Phase 2 study adopted Experian’s 2020 local expenditure data. Experian’s expenditure, special forms of trading (SFT) and retail sales density projections, from the Retail Planner Briefing Note 19 (January 2022), were adopted in the Phase 2 report. This Experian information has now been superseded by new data in the Retail Planner Briefing Note 21 (February 2024). This Addendum report adopts Experian’s latest data and projections.

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

Assumptions and base data

- 2.1 All monetary values expressed in this study are at 2022 prices, consistent with Experian's latest base year expenditure figures for 2022. These 2022 figures are based on actual recorded expenditure levels rather than projections or forecasts. The previous Phase 2 report adopted a 2020 price base and therefore expenditure and turnover figures are not directly comparable with this Addendum report.

Study area zones and population

- 2.2 The Borough was sub-divided into seven zones as shown in Appendix 1 of the Phase 2 report, based on ward boundaries, reflecting the primary catchment areas of the main shopping destinations in LBRuT. A household survey was undertaken during May 2022 to estimate shopping patterns.
- 2.3 As indicated in Section 1, population projections previously adopted remain the most accurate. The projected population within each zone between 2022 to 2039 is set out in Table 1 in Appendix 1, based on the GLA's 2020-based projections for wards (housing trajectory projections). The 2022 population within LBRuT was 197,406 and this was projected to increase to 198,413 by 2024 and then to 198,770 by 2039.

Retail Expenditure

- 2.4 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2022 have been obtained.
- 2.5 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 21 – February 2024) has been used to forecast expenditure in LBRuT. Experian's short term EBS growth forecast rates during 2023, 2024 and 2025 reflect current economic circumstances, including Covid-19 and the cost of living crisis. The forecast changes during this period are as follows:
- convenience goods: -3.7%;
 - comparison goods: -1.9%;
 - leisure: -1.0%.
- 2.6 After 2025, Experian's latest medium and long-term growth average forecasts have been adopted, as follows:
- convenience goods: no growth between 2026 to 2030 and +0.1% per annum growth for 2031 and beyond;
 - comparison goods: +3.1% per annum growth for 2026 to 2030 and +2.8% per annum for 2031 and beyond; and
 - leisure: +1.1% per annum growth for 2026 to 2030 and +0.8% per annum for 2031 and beyond.

- 2.7 These growth figures relate to real growth and exclude inflation.
- 2.8 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2024 are:
- 5.2% of convenience goods expenditure; and
 - 24.3% of comparison goods expenditure.
- 2.9 Experian's projections suggest that these percentages will increase to 6.3% and 27.4% by 2029, respectively. The long-term Experian projections suggest an increase to 7.4% and 29.7% by 2039, respectively.
- 2.10 Table 2 in Appendix 1 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2039, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 2 and food/beverage expenditure is shown in Table 2 in Appendix 3.
- 2.11 Based on the changes in population and per capita spending (excluding SFT), total convenience goods spending in LBRuT is forecast to decrease by -1.3% from £547.17 million in 2024 to £540.09 million in 2039, as shown in Table 3 (Appendix 1).
- 2.12 Comparison goods spending is forecast to increase by +42.9% between 2022 and 2039, increasing from £606.36 million in 2024 to £866.47 million in 2039, as shown in Table 3 (Appendix 2).
- 2.13 Food and beverage spending is forecast to increase by +14.6% between 2024 and 2039, increasing from £544.07 million in 2024 to £623.46 million in 2039, as shown in Table 3 (Appendix 3).

Growth in turnover densities

- 2.14 Experian's Retail Planner Briefing Note 21, February 2024 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +1.5% during 2025, and further growth is envisaged in the medium and long term (+2.6% per annum during 2026 and beyond). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are consistent with the likely high increase in on-line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.
- 2.15 For convenience goods retail, Experian indicates no forecast increase in sales densities during 2025, but a small average increase of +0.2% per annum during 2026 to 2030 and +0.1% per annum thereafter.
- 2.16 For leisure uses including food and beverage, Experian indicates no forecast increase in sales densities during 2025, but a small average increase of +0.5% per annum during 2026 to 2030 and +0.2% per annum thereafter.

Base year market shares

- 2.17 The 2024 turnover of facilities within LBRuT has been recalculated based on the updated expenditure projections and market shares or penetration rates estimated from the household survey undertaken in May 2022. The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 1 and Table 4 in Appendix 2, respectively. The market share for convenience goods facilities in Zone 1 – Richmond and Zone 6 – Kew North Richmond have been corrected to include the Sainsbury’s superstore on Lower Richmond Road in Zone 6 rather than Zone 1, as incorrectly assumed in the Phase 2 study. The market shares for comparison goods and food/beverage expenditure are shown in Tables 4 in Appendix 2 and 3, respectively.

Capacity for convenience goods retail floorspace

- 2.18 Based on the market shares calculated from the May 2022 household survey results, available convenience goods expenditure retained in LBRuT in 2024 is shown in Table 5 in Appendix 1. These expenditure estimates have been projected forward to 2029, 2034 and 2039, and summarised in Table 9 in Appendix 1. Convenience goods expenditure available to facilities within LBRuT is expected to decrease from £511.15 million in 2024 to £505.27 million in 2039, as shown in Table 9 in Appendix 1. This decrease is due to the reduction in average expenditure per person (excluding SFT).
- 2.19 Table 9 in Appendix 1 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future. There is a projected convenience goods expenditure deficit of -£16.52 million at 2034 due to the increase in home shopping (SFT), as shown in Table 9 in Appendix 1. This expenditure deficit is projected to decrease slightly to -£15.68 million at 2039.
- 2.20 The deficit expenditure projections are converted into floorspace estimates Table 10 in Appendix 1 based on an average sales density of £12,000 per sq.m net, which is an approximate average for the main food store operators. The results are summarised in Table 2.1.

Table 2.1 Convenience goods floorspace capacity (sq.m gross) – cumulative

	2029	2034	2039
Zone 1 – Richmond	-284	-237	-94
Zone 2 – Twickenham	-483	-850	-975
Zone 3 – Whitton	-53	-93	-100
Zone 4 – Teddington	-155	-288	-141
Zone 5 – Hampton/ Hampton Hill	-274	-475	-456
Zone 6 - Kew/ North Richmond	-111	67	93
Zone 7 – Barnes/ East Sheen	-76	-65	-158
Total	-1,435	-1,940	-1,831

Source: Table 10, Appendix 1.

- 2.21 Table 2.1 sets out gross floorspace figures rather than net sales areas i.e. the area devoted to the sale and display of products. The gross floorspace also includes storage and other

backstage areas not accessible to customers. The average net sales to gross floorspace ratio adopted is 70% for convenience goods retail and 75% for comparison goods retail floorspace. The NPPF impact threshold (2,500 sq.m) relates to gross floorspace. For consistency with the NPPF threshold, gross floorspace figures have been presented in this Addendum, although the net sales figures areas are shown in the Appendices.

- 2.22 The deficit expenditure projections up to 2039 imply a combined over-supply of convenience goods floorspace in LBRuT of 1,831 sq.m gross.
- 2.23 The Phase 2 Richmond Retail Study also predicted an over-supply of 1,011 sq.m gross in 2039. The updated floorspace projections remain negative due to lower expenditure growth and a higher proportion of home shopping expenditure.

Capacity for comparison goods floorspace

- 2.24 Available comparison goods expenditure has been projected to 2029, 2034 and 2039, as summarised in Table 9 in Appendix 2. Comparison goods expenditure available to facilities in LBRuT is expected to increase from £371.09 million in 2024 to £531.57 million by 2039.
- 2.25 Table 9 in Appendix 2 subtract the turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be offset by expected growth in turnover densities up to and beyond 2039 i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.
- 2.26 By 2029 there is a projected small expenditure deficit of -£4.74 million, which will increase to -£7.53 million in 2034 and -£7.96 million in 2039. These projections suggest growth in turnover densities will absorb expenditure growth and there is likely to be an over-supply of comparison goods retail floorspace for the foreseeable future.
- 2.27 The deficit expenditure projections have been converted into floorspace estimates Table 10 in Appendix 2. The results are summarised in Table 2.2.

Table 2.2 Comparison goods floorspace capacity (sq.m gross) – cumulative

	2029	2034	2039
Zone 1 – Richmond	-233	-73	10
Zone 2 – Twickenham	-343	-718	-817
Zone 3 – Whitton	-27	-57	-63
Zone 4 – Teddington	-166	-371	-166
Zone 5 – Hampton/ Hampton Hill	-52	-103	-114
Zone 6 - Kew/ North Richmond	-12	139	152
Zone 7 – Barnes/ East Sheen	31	61	-44
Total	-803	-1,122	-1,042

Source: Table 10, Appendix 2.

- 2.28 The deficit expenditure projections up to 2039 imply a combined over-supply of comparison goods floorspace in LBRuT of 1,042 sq.m gross. The Phase 2 Richmond Retail Study also predicted an over-supply of 548 sq.m gross in 2039.

Capacity for food/beverage floorspace

- 2.29 Available food and beverage expenditure has been projected forward to 2029, 2034 and 2039, as summarised in Table 9 in Appendix 3. The amount of expenditure attracted to LBRuT is expected to increase from £576.74 million in 2024 to £658.99 million in 2039.
- 2.30 Table 9 in Appendix 3 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. The projections indicate an expenditure surplus of £16.08 million in 2029, increasing to £34.05 million in 2034 and then to £56.95 million in 2039.
- 2.31 Floorspace capacity projections are shown in Table 10 in Appendix 3. The capacity figures are shown in Table 2.3 below. The surplus expenditure projections up to 2039 imply a combined under-supply of food and beverage floorspace in LBRuT of 9,094 sq.m gross.

Table 2.3 Food and beverage floorspace capacity (sq.m gross) – cumulative

	2029	2034	2039
Zone 1 – Richmond	803	2,031	3,324
Zone 2 – Twickenham	449	777	1,315
Zone 3 – Whitton	57	99	178
Zone 4 – Teddington	493	860	2,034
Zone 5 – Hampton/ Hampton Hill	59	131	207
Zone 6 - Kew/ North Richmond	177	481	649
Zone 7 – Barnes/ East Sheen	590	1,112	1,386
Total	2,628	5,491	9,094

Source: Table 10A, Appendix 2.

- 2.32 The Phase 2 Richmond Retail Study also predicted a slightly lower over-supply of 7,722 sq.m gross in 2039. The implications of the updated floorspace capacity projections are set out in the next section.

3.0 Conclusions

3.1 The key findings of the updated analysis in this Addendum are as follows:

- the GLA 2020-based population projections continue to be the most accurate at the current time for the purposes of forecasting future retail needs;
- population growth sensitivity testing based on the interim 2021 housing-led projections (identified capacity scenario) indicate only marginally higher floorspace projections and do not indicate an alternative policy approach should be adopted;
- Experian's latest (February 2024) expenditure, home shopping (SFT) and sales density information and forecasts have been adopted and reflect current economic circumstances, including Covid-19 and the cost of living crisis;
- the 2024 turnover of facilities within LBRuT has been recalculated based on updated data. The market share for convenience goods facilities in Zone 1 – Richmond and Zone 6 – Kew/North Richmond have been corrected to include the Sainsbury's superstore on Lower Richmond Road in Zone 6 rather than Zone 1, as incorrectly assumed in the Phase 2 study;
- the deficit convenience goods expenditure projections up to 2039 imply a combined over-supply of convenience goods floorspace in LBRuT of 1,831 sq.m gross, compared with the Phase 2 Richmond Retail Study predicted over-supply of 1,011 sq.m gross.
- the deficit comparison goods expenditure projections up to 2039 imply a combined over-supply of comparison goods floorspace in LBRuT of 1,042 sq.m gross, compared with the Phase 2 predicted over-supply of 548 sq.m gross.
- the surplus food/beverage expenditure projections up to 2039 imply a combined under-supply of food and beverage floorspace in LBRuT of 9,094 sq.m gross in 2039, compared with the Phase 2 slightly lower predicted over-supply of 7,722 sq.m gross.

3.2 The updated assessment of the potential for new retail, food/beverage floorspace within the previous section suggests there is modest long-term scope for new development within LBRuT.

3.3 Tables 3.1, 3.2 and 3.3 below summarise the floorspace requirements in LBRuT up to 2029, 2034 and 2039 (cumulative).

3.4 As in the Phase 2 study, these projections assume LBRuT can maintain its 2022 market share of expenditure in the future. Table 3.1 indicates there is a small combined projected requirement of 390 sq.m gross of retail and food/beverage floorspace in 2029. By 2034 the combined requirement increases to 2,429 sq.m gross and then to 6,221 sq.m gross in 2039.

3.5 These updated projections are very similar to the projections in the Phase 2 study, with the 2039 figure marginally higher at 6,221 sq.m gross compared with 6,123 sq.m gross.

Table 3.1 Summary of retail and food/beverage floorspace capacity up to 2029 (sq.m gross)

Zone	Convenience retail	Comparison retail	Food/ beverage	Total
1 – Richmond	-284	-233	803	286
2 – Twickenham	-483	-343	449	-377
3 – Whitton	-53	-27	57	-23
4 – Teddington	-155	-166	493	172
5 – Hampton/ Hampton Hill	-274	-52	59	-267
6 - Kew/ North Richmond	-111	-12	177	54
7 – Barnes/ East Sheen	-76	31	590	545
Total	-1,435	-803	2,628	390

Table 3.2 Summary of retail and food/beverage floorspace capacity up to 2034 (sq.m gross)

Zone	Convenience retail	Comparison retail	Food/ beverage	Total
1 – Richmond	-237	-73	2,031	1,721
2 – Twickenham	-850	-718	777	-791
3 – Whitton	-93	-57	99	-51
4 – Teddington	-288	-371	860	201
5 – Hampton/ Hampton Hill	-475	-103	131	-447
6 - Kew/ North Richmond	67	139	481	687
7 – Barnes/ East Sheen	-65	61	1,112	1,108
Total	-1,940	-1,122	5,491	2,429

Table 3.3 Summary of retail and food/beverage floorspace capacity up to 2039 (sq.m gross)

Zone	Convenience retail	Comparison retail	Food/ beverage	Total
1 – Richmond	-94	10	3,324	3,240
2 – Twickenham	-975	-817	1,315	-477
3 – Whitton	-100	-63	178	15
4 – Teddington	-141	-166	2,034	1,727
5 – Hampton/ Hampton Hill	-456	-114	207	-363
6 - Kew/ North Richmond	93	152	649	894
7 – Barnes/ East Sheen	-158	-44	1,386	1,184
Total	-1,831	-1,042	9,094	6,221

3.6

The NPPF (both the September 2023 and December 2023 versions) continue to indicate local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least 10 years. Projections in 2039 are very long term and therefore less reliable. Projections to 2034 are likely to be more reliable for planning purposes. Longer term projections should be monitored and kept under review and may need to be updated as part of future plan reviews.

- 3.7 As in the Phase 2 study, the projections do not take account extant planning permission or pipeline proposals, such as the Stag Brewery near Mortlake which could meet the combined long-term floorspace projections in Zone 6 and 7.
- 3.8 The total amount of vacant floorspace in centres and parades was estimated to be at least 22,000 sq.m gross in 2021. The Phase 2 study indicated that a realistic reduction in the shop vacancy rate from 8.9% to 7% (consistent with lower historic vacancy rates recorded in 2016/2017) could theoretically accommodate about 5,000 sq.m of new uses. The Council's more recent land use survey information suggest the vacancy rate had reduced to 8.4% in 2022 and to 8.1% in 2023. This data for 2022 and 2023 suggests a continued reduction in the shop vacancy rate to 7% in the future can be achieved. On this basis, the continued re-occupation of vacant units, could meet most of the projected combined retail and food/beverage floorspace under-supply up to 2039 (6,221 sq.m gross).
- 3.9 The updated capacity assessment confirms the proposed policy approach in the emerging Local Plan remains robust and sound.

Appendix 1 Convenience goods assessment

Table 1 - Study area population projections

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

Sources:

GLA ward level population projections - housing led 2020-based

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

	2024	2029	2034	2039
Zone 1 - Richmond	3,040	2,999	2,989	2,991
Zone 2 - Twickenham	2,806	2,768	2,758	2,760
Zone 3 - Whitton	2,307	2,275	2,267	2,269
Zone 4 - Teddington	2,695	2,658	2,649	2,651
Zone 5 - Hampton	2,550	2,515	2,507	2,508
Zone 6 - Kew/North Richmond	2,927	2,887	2,877	2,879
Zone 7 - Barnes/East Sheen	3,011	2,970	2,960	2,962

Sources:

Experian Local Expenditure 2022 (2022 prices)

Experian growth rates - Retail Planner Briefing Note 21 (February 2024)

Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m)

	2024	2029	2034	2039
Zone 1 - Richmond	70.61	68.56	68.76	71.13
Zone 2 - Twickenham	94.72	92.40	90.26	88.84
Zone 3 - Whitton	73.49	71.87	70.62	70.68
Zone 4 - Teddington	88.95	87.32	85.64	88.87
Zone 5 - Hampton	50.48	49.23	48.49	48.03
Zone 6 - Kew/North Richmond	70.28	70.29	73.62	74.48
Zone 7 - Barnes/East Sheen	98.63	98.78	99.15	98.06
LBRuT Total	547.17	538.45	536.54	540.09

Source: Tables 1 and 2

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

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Zone 1 - Richmond	53.7%	7.8%	2.2%	1.5%	0.0%	25.1%	7.9%	20.0%
Zone 2 - Twickenham	3.8%	62.6%	33.1%	16.0%	17.2%	4.6%	4.4%	15.0%
Zone 3 - Whitton	0.0%	0.0%	18.3%	0.0%	0.0%	0.0%	0.0%	10.0%
Zone 4 - Teddington	2.4%	1.6%	2.9%	38.4%	2.2%	0.0%	0.0%	15.0%
Zone 5 - Hampton/Hampton Hill	0.2%	2.0%	12.2%	25.2%	69.9%	0.0%	0.0%	10.0%
Zone 6 - Kew/North Richmond	10.3%	5.2%	0.6%	0.0%	2.1%	54.6%	10.3%	10.0%
Zone 7 - Barnes/East Sheen	5.3%	0.6%	0.0%	0.8%	0.0%	9.0%	55.5%	10.0%
LBRuT total	75.7%	79.8%	69.3%	81.9%	91.4%	93.3%	78.1%	
Outflow	24.3%	20.2%	30.7%	18.1%	8.6%	6.7%	21.9%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

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

Table 5 - Base year 2024 convenience goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2024	70.61	94.72	73.49	88.95	50.48	70.28	98.63		547.17
Zone 1 - Richmond	37.92	7.39	1.62	1.33	0.00	17.64	7.79	18.42	92.12
Zone 2 - Twickenham	2.68	59.29	24.33	14.23	8.68	3.23	4.34	20.61	137.40
Zone 3 - Whitton	0.00	0.00	13.45	0.00	0.00	0.00	0.00	1.49	14.94
Zone 4 - Teddington	1.69	1.52	2.13	34.16	1.11	0.00	0.00	7.17	47.78
Zone 5 - Hampton/Hampton Hill	0.14	1.89	8.97	22.42	35.28	0.00	0.00	7.63	76.34
Zone 6 - Kew/North Richmond	7.27	4.93	0.44	0.00	1.06	38.38	10.16	6.91	69.15
Zone 7 - Barnes/East Sheen	3.74	0.57	0.00	0.71	0.00	6.33	54.74	7.34	73.43
LBRuT total	53.46	75.59	50.93	72.85	46.14	65.57	77.03	69.59	511.15
Outflow	17.16	19.13	22.56	16.10	4.34	4.71	21.60		105.61
TOTAL	70.61	94.72	73.49	88.95	50.48	70.28	98.63	69.59	616.76

Source: Tables 3 and 4

Table 6 - Future 2029 convenience goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2029	68.56	92.40	71.87	87.32	49.23	70.29	98.78		538.45
Zone 1 - Richmond	36.82	7.21	1.58	1.31	0.00	17.64	7.80	18.09	90.45
Zone 2 - Twickenham	2.61	57.84	23.79	13.97	8.47	3.23	4.35	20.16	134.42
Zone 3 - Whitton	0.00	0.00	13.15	0.00	0.00	0.00	0.00	1.46	14.61
Zone 4 - Teddington	1.65	1.48	2.08	33.53	1.08	0.00	0.00	7.03	46.85
Zone 5 - Hampton/Hampton Hill	0.14	1.85	8.77	22.01	34.41	0.00	0.00	7.46	74.63
Zone 6 - Kew/North Richmond	7.06	4.80	0.43	0.00	1.03	38.38	10.17	6.88	68.76
Zone 7 - Barnes/East Sheen	3.63	0.55	0.00	0.70	0.00	6.33	54.82	7.34	73.37
LBRuT total	51.90	73.74	49.80	71.52	45.00	65.58	77.15	68.42	503.10
Outflow	16.66	18.67	22.06	15.81	4.23	4.71	21.63		103.77
TOTAL	68.56	92.40	71.87	87.32	49.23	70.29	98.78	68.42	606.87

Source: Tables 3 and 4

Table 7 - Future 2034 convenience goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2034	68.76	90.26	70.62	85.64	48.49	73.62	99.15		536.54
Zone 1 - Richmond	36.93	7.04	1.55	1.28	0.00	18.48	7.83	18.28	91.39
Zone 2 - Twickenham	2.61	56.50	23.38	13.70	8.34	3.39	4.36	19.81	132.10
Zone 3 - Whitton	0.00	0.00	12.92	0.00	0.00	0.00	0.00	1.44	14.36
Zone 4 - Teddington	1.65	1.44	2.05	32.89	1.07	0.00	0.00	6.90	46.00
Zone 5 - Hampton/Hampton Hill	0.14	1.81	8.62	21.58	33.89	0.00	0.00	7.34	73.37
Zone 6 - Kew/North Richmond	7.08	4.69	0.42	0.00	1.02	40.20	10.21	7.07	70.70
Zone 7 - Barnes/East Sheen	3.64	0.54	0.00	0.69	0.00	6.63	55.03	7.39	73.92
LBRuT total	52.05	72.03	48.94	70.14	44.32	68.69	77.43	68.23	501.83
Outflow	16.71	18.23	21.68	15.50	4.17	4.93	21.71		102.94
TOTAL	68.76	90.26	70.62	85.64	48.49	73.62	99.15	68.23	604.77

Source: Tables 3 and 4

Table 8 - Future 2039 convenience goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2039	71.13	88.84	70.68	88.87	48.03	74.48	98.06		540.09
Zone 1 - Richmond	38.20	6.93	1.55	1.33	0.00	18.69	7.75	18.61	93.07
Zone 2 - Twickenham	2.70	55.62	23.39	14.22	8.26	3.43	4.31	19.75	131.69
Zone 3 - Whitton	0.00	0.00	12.93	0.00	0.00	0.00	0.00	1.44	14.37
Zone 4 - Teddington	1.71	1.42	2.05	34.12	1.06	0.00	0.00	7.12	47.48
Zone 5 - Hampton/Hampton Hill	0.14	1.78	8.62	22.39	33.57	0.00	0.00	7.39	73.90
Zone 6 - Kew/North Richmond	7.33	4.62	0.42	0.00	1.01	40.67	10.10	7.13	71.27
Zone 7 - Barnes/East Sheen	3.77	0.53	0.00	0.71	0.00	6.70	54.42	7.35	73.49
LBRuT total	53.85	70.90	48.98	72.78	43.90	69.49	76.58	68.79	505.27
Outflow	17.29	17.95	21.70	16.08	4.13	4.99	21.47		103.61
TOTAL	71.13	88.84	70.68	88.87	48.03	74.48	98.06	68.79	608.88

Source: Tables 3 and 4

Table 9 - Summary of convenience goods expenditure 2022 to 2039 (£M)

	2024	2029	2034	2039
Available expenditure				
Zone 1 - Richmond	92.12	90.45	91.39	93.07
Zone 2 - Twickenham	137.40	134.42	132.10	131.69
Zone 3 - Whitton	14.94	14.61	14.36	14.37
Zone 4 -Teddington	47.78	46.85	46.00	47.48
Zone 5 - Hampton/Hampton Hill	76.34	74.63	73.37	73.90
Zone 6 - Kew/North Richmond	69.15	68.76	70.70	71.27
Zone 7 - Barnes/East Sheen	73.43	73.37	73.92	73.49
Total	511.15	503.10	501.83	505.27
Turnover of existing facilities				
Zone 1 - Richmond	92.12	92.85	93.41	93.88
Zone 2 - Twickenham	137.40	138.50	139.34	140.04
Zone 3 - Whitton	14.94	15.06	15.15	15.23
Zone 4 -Teddington	47.78	48.16	48.45	48.69
Zone 5 - Hampton/Hampton Hill	76.34	76.95	77.41	77.80
Zone 6 - Kew/North Richmond	69.15	69.70	70.12	70.47
Zone 7 - Barnes/East Sheen	73.43	74.02	74.47	74.84
Total	511.15	515.26	518.35	520.95
Surplus/deficit expenditure £M				
Zone 1 - Richmond	0.00	-2.40	-2.02	-0.81
Zone 2 - Twickenham	0.00	-4.09	-7.24	-8.35
Zone 3 - Whitton	0.00	-0.45	-0.80	-0.86
Zone 4 -Teddington	0.00	-1.31	-2.45	-1.21
Zone 5 - Hampton/Hampton Hill	0.00	-2.32	-4.04	-3.90
Zone 6 - Kew/North Richmond	0.00	-0.94	0.57	0.80
Zone 7 - Barnes/East Sheen	0.00	-0.65	-0.55	-1.35
Total	0.00	-12.15	-16.52	-15.68

Source: Tables 5 to 8

Table 10 - Convenience goods floorspace capacity up to 2039

	2024	2029	2034	2039
Turnover density new floorspace (£ per sq.m)	£12,000	£12,096	£12,169	£12,230
Floorspace projection (sq.m net)				
Zone 1 - Richmond	0	-199	-166	-66
Zone 2 - Twickenham	0	-338	-595	-683
Zone 3 - Whitton	0	-37	-65	-70
Zone 4 -Teddington	0	-108	-202	-99
Zone 5 - Hampton/Hampton Hill	0	-191	-332	-319
Zone 6 - Kew/North Richmond	0	-78	47	65
Zone 7 - Barnes/East Sheen	0	-53	-45	-110
Total	0	-1,005	-1,358	-1,282
Floorspace Projection (sq.m gross)				
Zone 1 - Richmond	0	-284	-237	-94
Zone 2 - Twickenham	0	-483	-850	-975
Zone 3 - Whitton	0	-53	-93	-100
Zone 4 -Teddington	0	-155	-288	-141
Zone 5 - Hampton/Hampton Hill	0	-274	-475	-456
Zone 6 - Kew/North Richmond	0	-111	67	93
Zone 7 - Barnes/East Sheen	0	-76	-65	-158
Total	0	-1,435	-1,940	-1,831

Source: Table 9

Appendix 2 Comparison goods assessment

Table 1 - Study area population projections

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

Sources:

GLA ward level population projections - housing led 2020-based

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

	2024	2029	2034	2039
Zone 1 - Richmond	3,260	3,628	4,097	4,644
Zone 2 - Twickenham	3,152	3,508	3,961	4,490
Zone 3 - Whitton	2,547	2,835	3,201	3,629
Zone 4 - Teddington	3,088	3,437	3,881	4,399
Zone 5 -Hampton	2,902	3,229	3,646	4,133
Zone 6 - Kew/North Richmond	3,215	3,578	4,040	4,579
Zone 7 - Barnes/East Sheen	3,252	3,619	4,087	4,633

Sources:

Experian Local Expenditure 2022 (2022 prices)

Experian growth rates - Retail Planner Briefing Note 21 (February 2024)

Excludes Special Forms of Trading

Table 3 - Total comparison goods expenditure (£m)

	2024	2029	2034	2039
Zone 1 - Richmond	75.73	82.94	94.25	110.45
Zone 2 - Twickenham	106.40	117.10	129.63	144.53
Zone 3 - Whitton	81.14	89.56	99.72	113.04
Zone 4 - Teddington	101.92	112.92	125.48	147.46
Zone 5 -Hampton	57.45	63.21	70.51	79.15
Zone 6 - Kew/North Richmond	77.20	87.12	103.38	118.46
Zone 7 - Barnes/East Sheen	106.53	120.37	136.90	153.38
LBRuT Total	606.36	673.20	759.87	866.47

Source: Tables 1 and 2

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

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

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

Table 5 - Base year 2024 comparison goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2024	75.73	106.40	81.14	101.92	57.45	77.20	106.53		606.36
Zone 1 - Richmond	22.34	22.45	2.84	1.33	0.06	30.65	13.21	23.22	116.09
Zone 2 - Twickenham	1.74	31.39	15.50	8.46	5.97	1.00	0.21	27.55	91.83
Zone 3 - Whitton	0.00	0.53	6.25	0.00	0.06	0.00	0.00	0.76	7.60
Zone 4 - Teddington	1.36	1.49	3.65	25.07	4.60	0.08	0.53	15.76	52.55
Zone 5 - Hampton/Hampton Hill	0.00	1.28	2.84	1.83	6.38	0.15	0.00	1.39	13.87
Zone 6 - Kew/North Richmond	0.00	0.00	0.00	0.20	0.00	5.40	0.00	0.62	6.23
Zone 6 - Kew Retail Park	1.67	1.92	1.22	0.10	0.06	9.65	5.75	10.96	31.32
Zone 7 - Barnes/East Sheen	0.91	0.32	0.16	1.12	0.00	3.78	40.16	5.16	51.62
LBRuT total	28.02	59.37	32.46	38.12	17.12	50.72	59.87	85.42	371.09
Outflow	47.71	47.03	48.68	63.80	40.33	26.48	46.66		320.69
TOTAL	75.73	106.40	81.14	101.92	57.45	77.20	106.53	85.42	691.78

Source: Tables 3 and 4

Table 6 - Future 2029 comparison goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2029	82.94	117.10	89.56	112.92	63.21	87.12	120.37		673.20
Zone 1 - Richmond	24.47	24.71	3.13	1.47	0.06	34.59	14.93	25.84	129.19
Zone 2 - Twickenham	1.91	34.55	17.11	9.37	6.57	1.13	0.24	30.38	101.25
Zone 3 - Whitton	0.00	0.59	6.90	0.00	0.06	0.00	0.00	0.84	8.38
Zone 4 - Teddington	1.49	1.64	4.03	27.78	5.06	0.09	0.60	17.44	58.12
Zone 5 - Hampton/Hampton Hill	0.00	1.41	3.13	2.03	7.02	0.17	0.00	1.53	15.29
Zone 6 - Kew/North Richmond	0.00	0.00	0.00	0.23	0.00	6.10	0.00	0.70	7.03
Zone 6 - Kew Retail Park	1.82	2.11	1.34	0.11	0.06	10.89	6.50	12.30	35.14
Zone 7 - Barnes/East Sheen	1.00	0.35	0.18	1.24	0.00	4.27	45.38	5.82	58.24
LBRuT total	30.69	65.34	35.82	42.23	18.84	57.24	67.65	94.84	412.64
Outflow	52.25	51.76	53.73	70.69	44.37	29.88	52.72		355.40
TOTAL	82.94	117.10	89.56	112.92	63.21	87.12	120.37	94.84	768.05

Source: Tables 3 and 4

Table 7 - Future 2034 comparison goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2034	94.25	129.63	99.72	125.48	70.51	103.38	136.90		759.87
Zone 1 - Richmond	27.80	27.35	3.49	1.63	0.07	41.04	16.98	29.59	147.96
Zone 2 -Twickenham	2.17	38.24	19.05	10.41	7.33	1.34	0.27	33.78	112.60
Zone 3 - Whitton	0.00	0.65	7.68	0.00	0.07	0.00	0.00	0.93	9.33
Zone 4 - Teddington	1.70	1.81	4.49	30.87	5.64	0.10	0.68	19.41	64.71
Zone 5 - Hampton/Hampton Hill	0.00	1.56	3.49	2.26	7.83	0.21	0.00	1.70	17.04
Zone 6 - Kew/North Richmond	0.00	0.00	0.00	0.25	0.00	7.24	0.00	0.83	8.32
Zone 6 - Kew Retail Park	2.07	2.33	1.50	0.13	0.07	12.92	7.39	14.22	40.64
Zone 7 - Barnes/East Sheen	1.13	0.39	0.20	1.38	0.00	5.07	51.61	6.64	66.42
LBRuT total	34.87	72.33	39.89	46.93	21.01	67.92	76.94	107.12	467.01
Outflow	59.38	57.30	59.83	78.55	49.50	35.46	59.96		399.98
TOTAL	94.25	129.63	99.72	125.48	70.51	103.38	136.90	107.12	866.99

Source: Tables 3 and 4

Table 8 - Future 2039 comparison goods expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2039	110.45	144.53	113.04	147.46	79.15	118.46	153.38		866.47
Zone 1 - Richmond	32.58	30.50	3.96	1.92	0.08	47.03	19.02	33.77	168.85
Zone 2 - Twickenham	2.54	42.64	21.59	12.24	8.23	1.54	0.31	38.18	127.27
Zone 3 - Whitton	0.00	0.72	8.70	0.00	0.08	0.00	0.00	1.06	10.56
Zone 4 - Teddington	1.99	2.02	5.09	36.28	6.33	0.12	0.77	22.54	75.13
Zone 5 - Hampton/Hampton Hill	0.00	1.73	3.96	2.65	8.79	0.24	0.00	1.93	19.30
Zone 6 - Kew/North Richmond	0.00	0.00	0.00	0.29	0.00	8.29	0.00	0.95	9.54
Zone 6 - Kew Retail Park	2.43	2.60	1.70	0.15	0.08	14.81	8.28	16.18	46.22
Zone 7 - Barnes/East Sheen	1.33	0.43	0.23	1.62	0.00	5.80	57.82	7.47	74.70
LBRuT total	40.87	80.65	45.22	55.15	23.59	77.83	86.20	122.08	531.57
Outflow	69.58	63.88	67.83	92.31	55.56	40.63	67.18		456.98
TOTAL	110.45	144.53	113.04	147.46	79.15	118.46	153.38	122.08	988.55

Source: Tables 3 and 4

Table 9 - Summary of comparison goods expenditure 2024 to 2039 (£M)

	2024	2029	2034	2039
Available expenditure				
Zone 1 - Richmond	116.09	129.19	147.96	168.85
Zone 2 -Twickenham	91.83	101.25	112.60	127.27
Zone 3 - Whitton	7.60	8.38	9.33	10.56
Zone 4 - Teddington	52.55	58.12	64.71	75.13
Zone 5 - Hampton/Hampton Hill	13.87	15.29	17.04	19.30
Zone 6 - Kew/North Richmond	6.23	7.03	8.32	9.54
Zone 6 - Kew Retail Park	31.32	35.14	40.64	46.22
Zone 7 - Barnes/East Sheen	51.62	58.24	66.42	74.70
Total	371.09	412.64	467.01	531.57
Turnover of existing facilities				
Zone 1 - Richmond	116.09	130.57	148.45	168.78
Zone 2 -Twickenham	91.83	103.28	117.42	133.50
Zone 3 - Whitton	7.60	8.54	9.71	11.05
Zone 4 - Teddington	52.55	59.10	67.20	76.40
Zone 5 - Hampton/Hampton Hill	13.87	15.60	17.74	20.16
Zone 6 - Kew/North Richmond	6.23	7.01	7.97	9.06
Zone 6 - Kew Retail Park	31.32	35.23	40.05	45.54
Zone 7 - Barnes/East Sheen	51.62	58.05	66.00	75.04
Total	371.09	417.39	474.54	539.53
Surplus/deficit expenditure £M				
Zone 1 - Richmond	0.00	-1.38	-0.49	0.07
Zone 2 -Twickenham	0.00	-2.03	-4.82	-6.24
Zone 3 - Whitton	0.00	-0.16	-0.39	-0.48
Zone 4 - Teddington	0.00	-0.98	-2.49	-1.27
Zone 5 - Hampton/Hampton Hill	0.00	-0.31	-0.69	-0.87
Zone 6 - Kew/North Richmond	0.00	0.02	0.35	0.48
Zone 6 - Kew Retail Park	0.00	-0.09	0.58	0.68
Zone 7 - Barnes/East Sheen	0.00	0.18	0.41	-0.34
Total	0.00	-4.74	-7.53	-7.96

Source: Tables 5 to 8

Table 10 - Comparison goods floorspace capacity up to 2039

	2024	2029	2034	2039
Turnover density new floorspace (£ per sq.m)	£7,000	£7,873	£8,951	£10,177
Floorspace projection (sq.m net)				
Zone 1 - Richmond	0	-175	-55	7
Zone 2 -Twickenham	0	-257	-539	-613
Zone 3 - Whitton	0	-21	-43	-47
Zone 4 - Teddington	0	-125	-278	-124
Zone 5 - Hampton/Hampton Hill	0	-39	-77	-85
Zone 6 - Kew/North Richmond	0	2	39	47
Zone 6 - Kew Retail Park	0	-11	65	67
Zone 7 - Barnes/East Sheen	0	23	46	-33
Total	0	-602	-841	-782
Floorspace Projection (sq.m gross)				
Zone 1 - Richmond	0	-233	-73	10
Zone 2 -Twickenham	0	-343	-718	-817
Zone 3 - Whitton	0	-27	-57	-63
Zone 4 - Teddington	0	-166	-371	-166
Zone 5 - Hampton/Hampton Hill	0	-52	-103	-114
Zone 6 - Kew/North Richmond	0	3	52	63
Zone 6 - Kew Retail Park	0	-15	87	89
Zone 7 - Barnes/East Sheen	0	31	61	-44
Total	0	-803	-1,122	-1,042

Source: Table 9

Appendix 1 Food/beverage assessment

Table 1 - Study area population projections

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

Sources:

GLA ward level population projections - housing led 2020-based

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

	2024	2029	2034	2039
Zone 1 - Richmond	2,971	3,122	3,259	3,391
Zone 2 - Twickenham	2,974	3,125	3,262	3,395
Zone 3 - Whitton	2,085	2,192	2,287	2,380
Zone 4 - Teddington	2,779	2,921	3,048	3,172
Zone 5 -Hampton	2,298	2,415	2,521	2,623
Zone 6 - Kew/North Richmond	3,015	3,169	3,307	3,442
Zone 7 - Barnes/East Sheen	3,011	3,165	3,303	3,437

Sources:

Experian Local Expenditure 2022 (2022 prices)

Experian growth rates - Retail Planner Briefing Note 21 (February 2024)

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

	2024	2029	2034	2039
Zone 1 - Richmond	69.01	71.37	74.97	80.65
Zone 2 - Twickenham	100.39	104.32	106.76	109.29
Zone 3 - Whitton	66.42	69.24	71.24	74.14
Zone 4 - Teddington	91.72	95.96	98.54	106.33
Zone 5 -Hampton	45.49	47.27	48.76	50.23
Zone 6 - Kew/North Richmond	72.40	77.16	84.63	89.04
Zone 7 - Barnes/East Sheen	98.63	105.27	110.64	113.78
LBRuT Total	544.07	570.59	595.54	623.46

Source: Tables 1 and 2

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

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

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

Table 5 - Future 2024 food/beverage expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2024	69.01	100.39	66.42	91.72	45.49	72.40	98.63		544.07
Zone 1 - Richmond	36.71	20.88	6.78	2.57	1.27	24.18	14.70	71.39	178.48
Zone 2 - Twickenham	4.35	55.52	21.06	4.68	6.55	0.87	1.08	40.33	134.43
Zone 3 - Whitton	0.00	0.20	10.43	0.00	0.14	0.00	0.10	4.66	15.52
Zone 4 - Teddington	7.87	5.42	10.30	60.08	19.47	0.43	0.30	25.97	129.83
Zone 5 - Hampton/Hampton Hill	0.21	0.00	0.46	1.01	8.51	1.88	0.00	3.02	15.09
Zone 6 -Kew/North Richmond	0.07	1.20	0.13	0.00	0.00	15.35	2.96	4.93	24.64
Zone 7 - Barnes/East Sheen	0.48	1.81	0.07	0.00	0.23	2.03	58.39	15.75	78.75
LBRuT total	49.69	85.03	49.22	68.33	36.17	44.74	77.52	166.04	576.74
Outflow	19.32	15.36	17.20	23.39	9.33	27.66	21.11		133.36
TOTAL	69.01	100.39	66.42	91.72	45.49	72.40	98.63	166.04	710.11

Source: Tables 3 and 4

Table 6 - Future 2029 food/beverage expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2029	71.37	104.32	69.24	95.96	47.27	77.16	105.27		570.59
Zone 1 - Richmond	37.97	21.70	7.06	2.69	1.32	25.77	15.68	74.80	186.99
Zone 2 - Twickenham	4.50	57.69	21.95	4.89	6.81	0.93	1.16	41.97	139.89
Zone 3 - Whitton	0.00	0.21	10.87	0.00	0.14	0.00	0.11	4.85	16.18
Zone 4 - Teddington	8.14	5.63	10.73	62.86	20.23	0.46	0.32	27.09	135.46
Zone 5 - Hampton/Hampton Hill	0.21	0.00	0.48	1.06	8.84	2.01	0.00	3.15	15.75
Zone 6 - Kew/North Richmond	0.07	1.25	0.14	0.00	0.00	16.36	3.16	5.24	26.22
Zone 7 - Barnes/East Sheen	0.50	1.88	0.07	0.00	0.24	2.16	62.32	16.79	83.95
LBRuT total	51.39	88.36	51.31	71.49	37.58	47.68	82.74	173.90	604.45
Outflow	19.98	15.96	17.93	24.47	9.69	29.47	22.53		140.04
TOTAL	71.37	104.32	69.24	95.96	47.27	77.16	105.27	173.90	744.49

Source: Tables 3 and 4

Table 7 - Future 2034 food/beverage expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2034	74.97	106.76	71.24	98.54	48.76	84.63	110.64		595.54
Zone 1 - Richmond	39.89	22.21	7.27	2.76	1.37	28.26	16.48	78.82	197.05
Zone 2 - Twickenham	4.72	59.04	22.58	5.03	7.02	1.02	1.22	43.12	143.75
Zone 3 - Whitton	0.00	0.21	11.19	0.00	0.15	0.00	0.11	5.00	16.65
Zone 4 - Teddington	8.55	5.76	11.04	64.55	20.87	0.51	0.33	27.90	139.51
Zone 5 - Hampton/Hampton Hill	0.22	0.00	0.50	1.08	9.12	2.20	0.00	3.28	16.41
Zone 6 -Kew/North Richmond	0.07	1.28	0.14	0.00	0.00	17.94	3.32	5.69	28.45
Zone 7 - Barnes/East Sheen	0.52	1.92	0.07	0.00	0.24	2.37	65.50	17.66	88.28
LBRuT total	53.98	90.42	52.79	73.42	38.76	52.30	86.96	181.47	630.10
Outflow	20.99	16.33	18.45	25.13	10.00	32.33	23.68		146.91
TOTAL	74.97	106.76	71.24	98.54	48.76	84.63	110.64	181.47	777.01

Source: Tables 3 and 4

Table 8 - Future 2039 food/beverage expenditure patterns by zone (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2039	80.65	109.29	74.14	106.33	50.23	89.04	113.78		623.46
Zone 1 - Richmond	42.90	22.73	7.56	2.98	1.41	29.74	16.95	82.85	207.13
Zone 2 - Twickenham	5.08	60.43	23.50	5.42	7.23	1.07	1.25	44.57	148.56
Zone 3 - Whitton	0.00	0.22	11.64	0.00	0.15	0.00	0.11	5.20	17.32
Zone 4 - Teddington	9.19	5.90	11.49	69.65	21.50	0.53	0.34	29.65	148.26
Zone 5 - Hampton/Hampton Hill	0.24	0.00	0.52	1.17	9.39	2.32	0.00	3.41	17.05
Zone 6 -Kew/North Richmond	0.08	1.31	0.15	0.00	0.00	18.88	3.41	5.96	29.79
Zone 7 - Barnes/East Sheen	0.56	1.97	0.07	0.00	0.25	2.49	67.36	18.18	90.89
LBRuT total	58.07	92.56	54.94	79.22	39.93	55.03	89.43	189.81	658.99
Outflow	22.58	16.72	19.20	27.11	10.30	34.02	24.35		154.28
TOTAL	80.65	109.29	74.14	106.33	50.23	89.04	113.78	189.81	813.27

Source: Tables 3 and 4

Table 9 - Summary of food/beverage expenditure 2024 to 2039 (£M)

	2024	2029	2034	2039
Available expenditure				
Zone 1 - Richmond	178.48	186.99	197.05	207.13
Zone 2 - Twickenham	134.43	139.89	143.75	148.56
Zone 3 - Whitton	15.52	16.18	16.65	17.32
Zone 4 - Teddington	129.83	135.46	139.51	148.26
Zone 5 - Hampton/Hampton Hill	15.09	15.75	16.41	17.05
Zone 6 -Kew/North Richmond	24.64	26.22	28.45	29.79
Zone 7 - Barnes/East Sheen	78.75	83.95	88.28	90.89
Total	576.74	604.45	630.10	658.99
Turnover of existing facilities				
Zone 1 - Richmond	178.48	182.08	184.46	186.31
Zone 2 - Twickenham	134.43	137.14	138.93	140.33
Zone 3 - Whitton	15.52	15.83	16.04	16.20
Zone 4 - Teddington	129.83	132.45	134.18	135.52
Zone 5 - Hampton/Hampton Hill	15.09	15.39	15.59	15.75
Zone 6 -Kew/North Richmond	24.64	25.14	25.47	25.72
Zone 7 - Barnes/East Sheen	78.75	80.34	81.39	82.20
Total	576.74	588.37	596.05	602.04
Surplus/deficit expenditure £M				
Zone 1 - Richmond	0.00	4.92	12.60	20.82
Zone 2 - Twickenham	0.00	2.75	4.82	8.24
Zone 3 - Whitton	0.00	0.35	0.61	1.12
Zone 4 - Teddington	0.00	3.02	5.33	12.74
Zone 5 - Hampton/Hampton Hill	0.00	0.36	0.81	1.30
Zone 6 -Kew/North Richmond	0.00	1.08	2.98	4.07
Zone 7 - Barnes/East Sheen	0.00	3.61	6.90	8.68
Total	0.00	16.08	34.05	56.95

Source: Tables 5 to 8

Table 10 - Food/beverage floorspace capacity up to 2039

	2024	2029	2034	2039
Turnover density new floorspace (£ per sq.m)	£6,000	£6,121	£6,201	£6,263
Floorspace projection (sq.m gross)				
Zone 1 - Richmond	0	803	2,031	3,324
Zone 2 - Twickenham	0	449	777	1,315
Zone 3 - Whitton	0	57	99	178
Zone 4 - Teddington	0	493	860	2,034
Zone 5 - Hampton/Hampton Hill	0	59	131	207
Zone 6 -Kew/North Richmond	0	177	481	649
Zone 7 - Barnes/East Sheen	0	590	1,112	1,386
Total	0	2,628	5,491	9,094

Source: Table 9

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