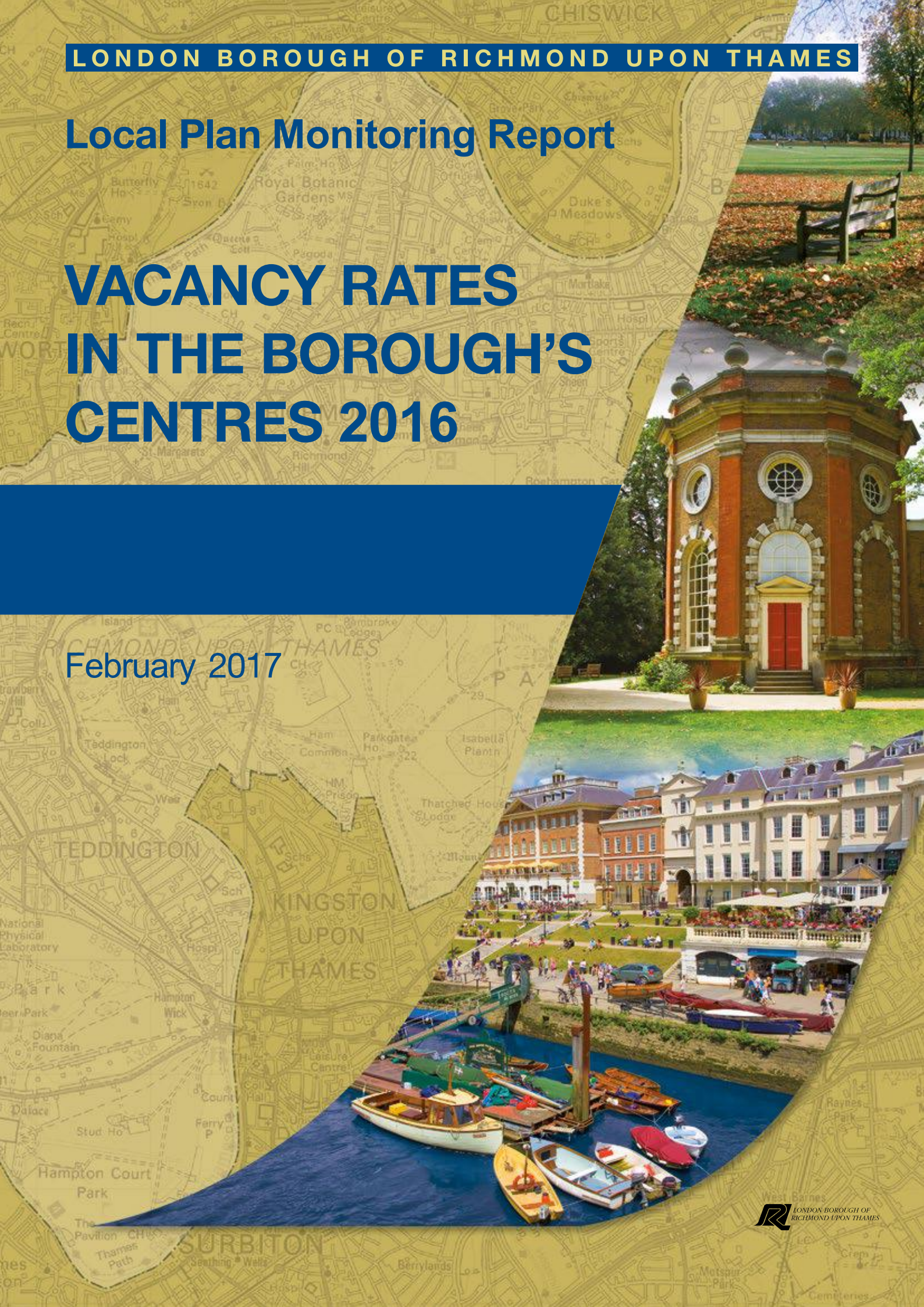


Local Plan Monitoring Report

VACANCY RATES IN THE BOROUGH'S CENTRES 2016

February 2017



If you need this document in Braille,
large print, audio tape,
or another language,
please contact us on
020 8891 7117 or
minicom 020 8831 6001

Civic Centre, 44 York Street
Twickenham TW1 3BZ
www.richmond.gov.uk

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 রিসেপশন-এ চলে আসুন যেখানে আমরা আপনাকে টেলিফোনে দোভাষীর
সেবা প্রদানের ব্যবস্থা করতে পারবো।

Bengali

اگر در فهمیدن این نشریه مشکلی دارید لطفاً 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 આવી, જ્યાં અમે ટેલિફોન પર ગુજ
રાતીમાં ઇન્ટરપ્રીટીંગ 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 ਟੈਲੀਫੋਨ ਤੇ ਗੱਲਬਾਤ
ਕਰਨ ਲਈ ਇੰਟਰਪ੍ਰਿਟਰ ਦਾ ਪ੍ਰਬੰਧ ਕਰ ਸਕਦੇ ਹਾਂ।

Punjabi

Local Plan Monitoring Report

2016 Town Centre Land Use Survey: Vacancy rates in the borough's centres

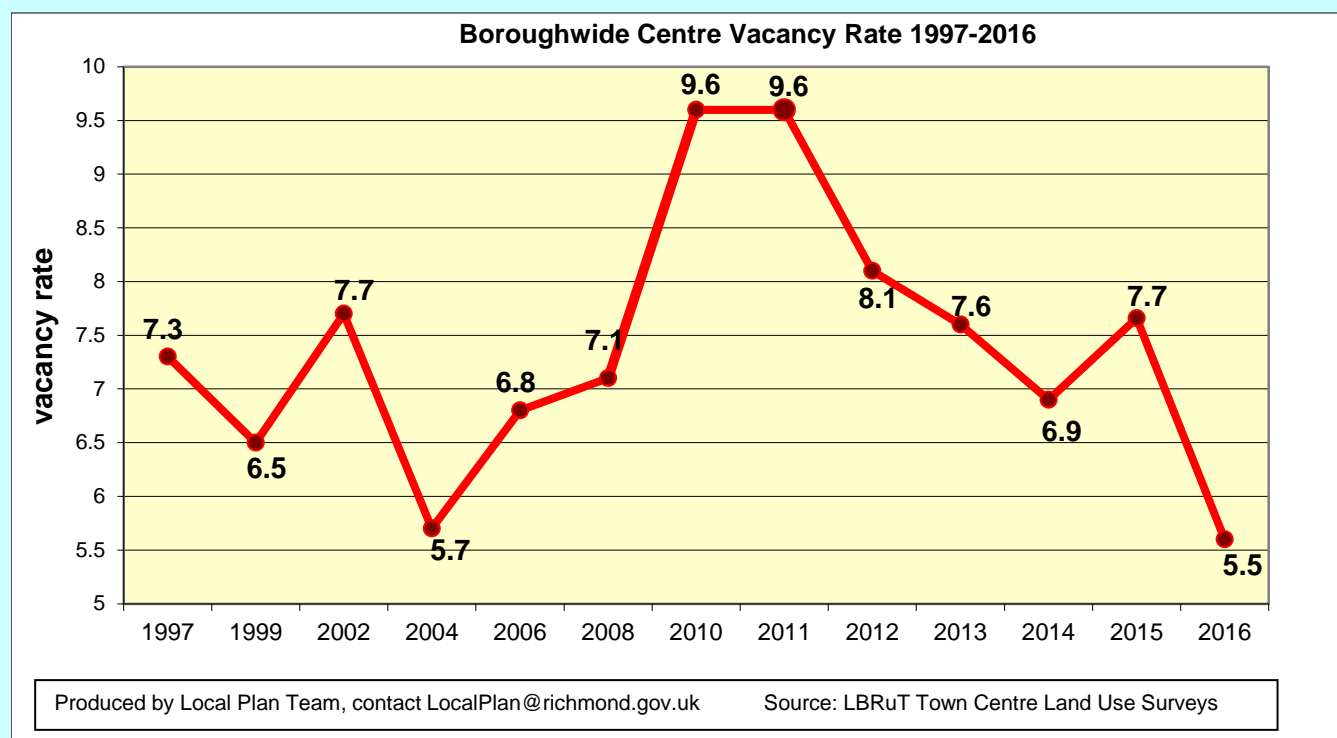
[page left intentionally blank]

Summary

The Council surveys the ground floor occupiers in centres across the borough each year to be able to systematically monitor changes in vacancy rates and types of use. It is a snapshot survey of 2,500 properties. The key findings are as follows:

Centre vacancy rates (the number of vacant premises/outlets as a proportion of the total premises/outlets in the centre)

- The overall number of vacant premises/outlets has fallen noticeably from the previous year. In total there were 133 vacant units borough wide in 2016 compared to 186 in 2015, 168 in 2014, 183 in 2013, 195 in 2012 and 233 in 2011.
- At 5.5% the borough centre vacancy rate continues on a predominantly downward trend and remains very low compared to the national average of c.11.1%.
- 4.9% of units in designated frontages were vacant in 2016. Vacancy rates in designated shopping frontages are lower than in non-designated frontages.



Shop vacancy rates (vacant A1 Use Class: retail, shops including retail services such as hairdressers and Post Offices as a proportion of all A1 occupiers)

- There were 77 vacant shops recorded by the survey in 2016 in centres across the borough. Between 2015 & 2016 the number of vacant outlets has fallen by 36 from 113.
- In 2015 8.8% of shops were vacant. The 2016 figures are significantly better than those for last year, with rates having fallen to just 6.1%.
- East Sheen and Twickenham have the largest actual numbers of vacant shops which reflects their size. While vacancies have risen marginally in East Sheen, the rate is in line with the average for this type of centre. Vacancies in both Richmond and Twickenham have fallen noticeably.
- Approximately 57.9% of all vacancies in the borough are vacant shops or retail services (within the A1 use class). Therefore a significant number of vacant units in the borough are not vacant shops illustrating it is not just retailers who are operating in challenging conditions.

Recently the government introduced changes to permitted development rights to allow change of use from shops (A1 Use Class) to financial services (A2 Use Class). As a response, the Council has made an Article 4 Direction to restrict this change in various centres across the borough which will come into effect on 1 April 2017.

1. Methodology

- 1.1.1 This Monitoring Report is one of several publications which assess the effectiveness of planning policies in the borough. Such reports will be published in a phased approach on the Council's website¹.
- 1.1.2 The Council has undertaken an Annual Land Use Survey of borough centres in the summer months since the late 1990s. It covers approximately 2,500 properties. The Land Use Survey is a snap shot survey, undertaken by observation in the field, i.e. the researcher makes a judgement as to the nature of the occupier on that particular day. Information is not requested from landlords, nor verified by an alternative data source. A judgement will be taken by the surveyor in the field as to whether the business is operating, but not open on the survey day. This would include for example, businesses only opening in the evenings, and a small number of shops which still close on Wednesday afternoons.
- 1.1.3 Only the ground floor occupier is recorded unless specified. It is therefore not a survey of floorspace. (Richmond has a number of stores with sales areas on several floors.) When amalgamating figures, occupiers are counted once per centre unless operating from separate premises within the same centre. Therefore, the amalgamation of units will not show the increase in floorspace and may in fact indicate a decrease in units in a particular use class, although the denominator would be reduced in line.
- 1.1.4 The survey includes all businesses in designated shopping frontages in the borough.
- 1.1.5 Units being refurbished are included in the vacancy count. In a small number of instances where it is advertised on-site that the existing/new business will be opening in the very near future, the premises will be recorded as occupied.
- 1.1.6 The document includes a **centre vacancy rate** which is the number of vacant premises/outlets as a proportion of the total premises/outlets in the centre. Since there is considerable interest in the health of retailing² at present a **shop vacancy rate** is also reported on which is the number of vacant shops as a proportion of all shops.

2. Background

2.1 Structural changes to retailing

- 2.1.1 There are well-documented changes to the retail sector resulting from growth in multichannel retailing, primarily internet shopping, which has resulted in debate about the amount of shopping needed in the High Street. The latest research suggests that the capital³, and the borough specifically⁴, still require additional retail floorspace. It is therefore important and timely to monitor vacancy rates.

2.2 Changes to permitted development rights:

- 2.2.1 In recent years the government has introduced a number of changes to permitted development rights affecting town centres, which have made it easier to change between uses without needing planning permission although some are subject to a prior approval process.

¹ http://www.richmond.gov.uk/home/services/planning/planning_policy/local_plan/authority_monitoring_report.htm

² A1 use class – shops, including A1 services such as hairdressers, ticket offices, Post Offices

³ <http://www.london.gov.uk/priorities/planning/publications/consumer-expenditure-and-comparison-goods-retail-floorspace-need>

⁴ http://www.richmond.gov.uk/richmond_retail_study_november_2014.pdf

Some of the more significant changes to PD rights affecting town centres allow:

Came into force in May 2013	change to a flexible use (A1, A2, A3 or B1 Use Classes) from A1, A2, A3, A4, or A5 for a temporary period of up to 2 years.
	Some exemptions but no prior approval process.
	change from B1 office to residential. Initially this change was temporary until 30th May 2016, but was subsequently made permanent in April 2016 ⁵ .
Came into force in April 2014	Some exemptions and limited prior approval process.
	change of use and some associated physical works from a small shop or provider of professional/financial services (A1 and A2 uses) to residential use (C3).
	Some exemptions and prior approval process.
Came into in April 2015	retail to banks and building societies (deposit-takers) - allows change of use from a shop (A1) to a bank or a building society.
	No prior approval process and few exemptions.
	change of use from shops (A1) to financial and professional services (A2).
	There is no prior approval process and no exemptions.

Please note: PD rights may be amended by later versions of the General Permitted Development Order in 2015 & 2016.

⁵ The Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2016 introduced other changes including launderettes being included in Class M- retail and specified sui generis uses to dwelling houses.

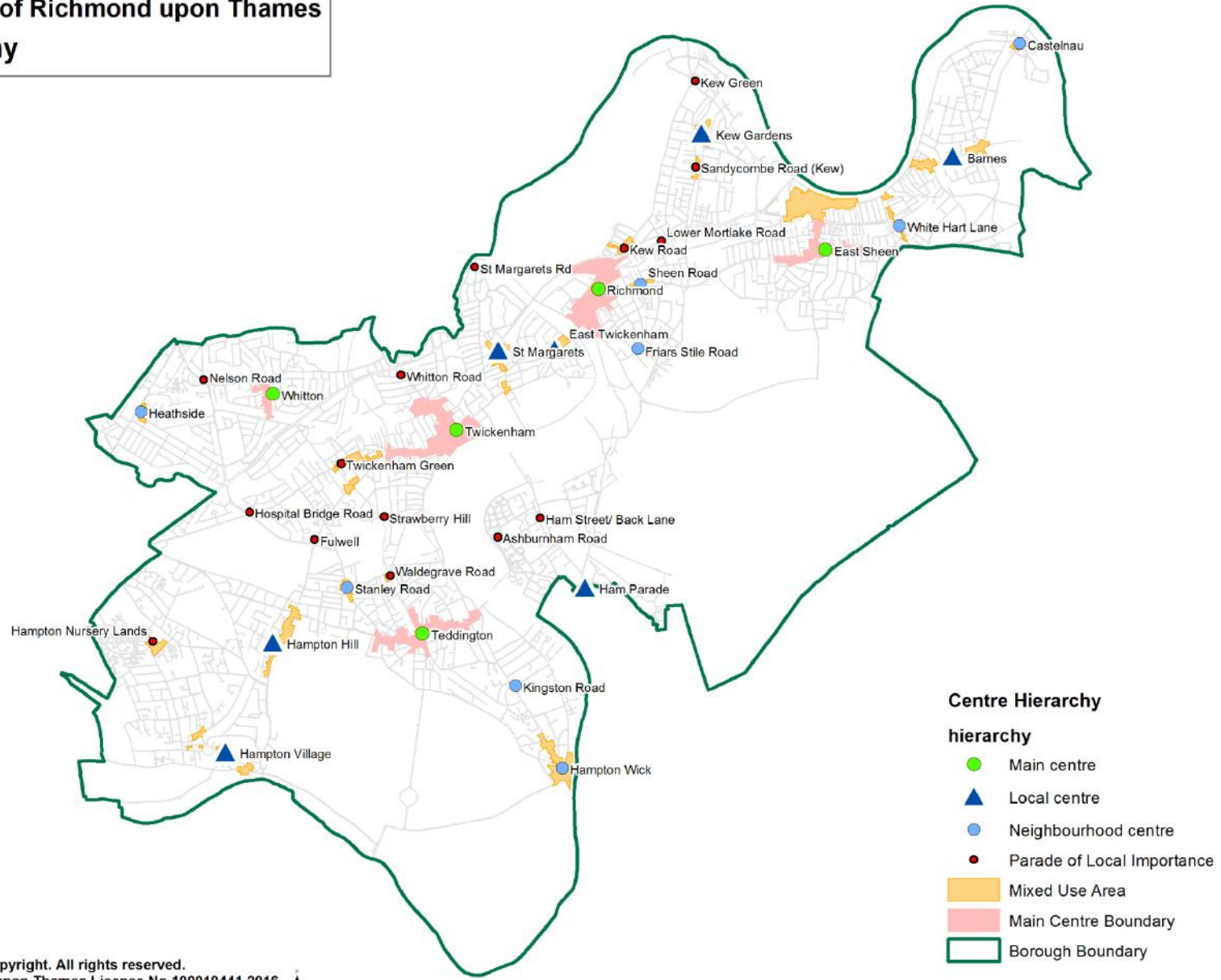
3. The Borough's centres

Table 1: Centre hierarchy¹

Type of centre	Name of centre
Main centres	Richmond Twickenham Teddington East Sheen Whitton
Local centres	Barnes (High Street & Church Road) East Twickenham Hampton Hill Hampton Village Ham Parade (Common) Kew Gardens St Margarets
Neighbourhood centres	Castelnau Friars Stile Road Hampton Wick Heathside (Powder Mill Lane/Hanworth Road) Sheen Road Kingston Road (Teddington) Stanley Road (Teddington) White Hart Lane (Barnes/Mortlake)
Parades of local importance	Ashburnham Road Fulwell Ham Street/Back Lane Hampton Nursery Lands Hospital Bridge Road Kew Green Kew Road Lower Mortlake Road Nelson Road St Margarets Road (parade north of the A316) Sandycombe Road (Kew) Strawberry Hill Twickenham Green Waldegrave Road Whitton Road

¹ Hierarchy set out in Core Strategy policy CP8 and the Publication Local Plan LP25.

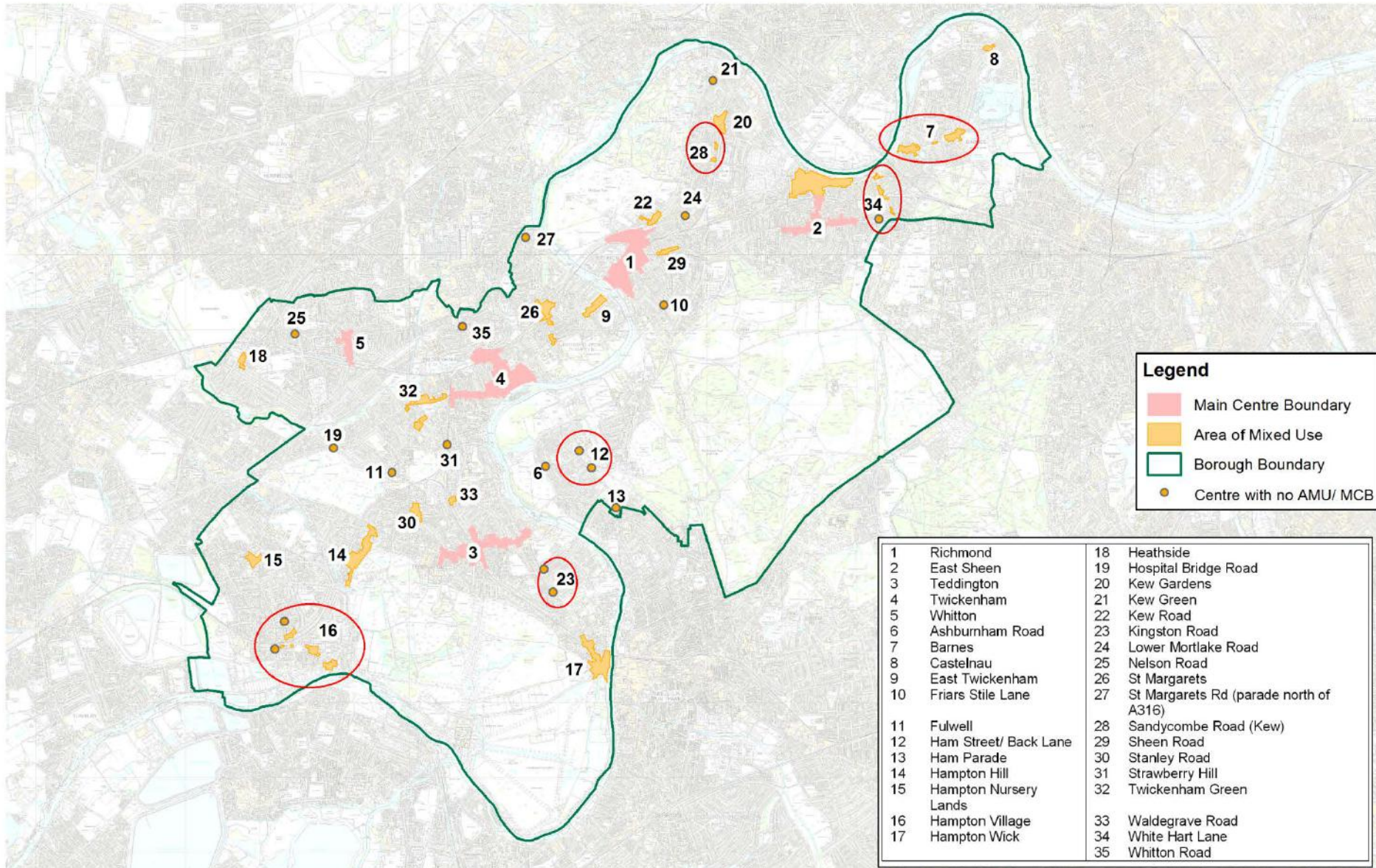
**London Borough of Richmond upon Thames
Centre Hierarchy**



Local Plan designations
Produced by Local Plan Team

Based on OS data. (c) Crown copyright. All rights reserved.
London Borough of Richmond upon Thames Licence No 100019441.2016

Centres in Richmond upon Thames



Based on OS data. (c) Crown copyright. All rights reserved.
London Borough of Richmond upon Thames Licence No 100019441.2016



Red circles identify extent of designated frontage in that particular centre

Local Plan designations
Produced by Local Plan Team

4. Centre vacancy rates

Table 2: Vacancy rates in 5 main town centres

	key shopping frontage						secondary shopping frontage						all designated frontage					
	2008	2010	2012	2014	2015	2016	2008	2010	2012	2014	2015	2016	2008	2010	2012	2014	2015	2016
Richmond	5.1	4.6	7.8	6.0	7.7	4.7	4.9	10.9	10.0	6.9	5.9	7.1	5	6.5	8.4	6.3	7.2	5.5
East Sheen	4.6	4.5	2.6	5.3	2.6	3.9	11.1	12.7	6.6	6.8	3.8	6.0	7.7	8.4	5.2	6.2	3.3	5.3
Teddington	5.3	7.9	2.6	3.4	3.4	7.7	4.3	7.8	10.0	1.7	3.3	6.7	4.7	7.8	5.1	2.8	3.4	7.3
Twickenham	4.5	6.8	8.3	9.2	7.6	4.6	3.9	6.5	10.3	7.9	7.0	6.1	4.3	6.7	9.3	8.6	7.3	5.3
Whitton	8.7	5.8	10.3	7.1	8.8	1.8	25.6	27.0	10.0	6.0	10.2	4.2	14.8	13.2	10.2	6.6	9.4	2.9
Average	5.6	5.5	6.5	6.2	6.4	4.9	10	11.1	9.2	6.3	5.7	6.2	7.3	7.9	7.6	6.3	6.1	5.4

	centre vacancy rate (all frontages) – 5 main centres						number of vacant units		
	2008	2010	2012	2014	2015	2016	2014	2015	2016
Richmond	5.4	6.8	8.3	6.5	7.3	5.3	23	26	19
East Sheen	6.2	9.7	6.5	5.9	4.8	6.2	17	14	18
Teddington	4.2	6.8	5.2	2.6	3.6	7.7	5	7	15
Twickenham	7.7	9.3	8.7	9.4	8.4	5.7	28	25	17
Whitton	13.3	11.9	10.4	6.7	9.0	3.8	9	12	5
Average/total	6.6	8.6	7.7	6.5	6.6	5.8	82	84	74

Source: LBRuT Town Centre Land Use Surveys. Produced by Local Plan Team. Snapshot surveys.
 Red indicates an increase in the vacancy rate between 2015 and 2016, black no change, and blue a fall in the rate.

- 4.1.1 Vacancy rates are regarded as one of, if not the best indicator of the health of town centres. However, unlike some indicators such as pedestrian flow which provide instant information, it may take some time for change to reveal itself through vacancy rates. This is because data are collected annually and a unit may have been vacant months before that point. Also, a business may be struggling for some time before closure and thus the survey would not reflect these difficult circumstances. However, there will naturally be some changes within centres with some businesses opening and others closing over the course of a year.
- 4.1.2 **The overall vacancy rate for the borough's five main centres in 2016 is 5.8%, a drop from 6.6% in 2015.** Numbers of vacant units have fallen by 10 to 74. Individually, centres have experienced some change, with Teddington and East Sheen experiencing a slight increase in vacancy rates and Richmond, Twickenham and Whitton a fall. Whitton in particular has seen a notable decrease in vacancies since 2015. A number of new retailers have begun trading in formerly vacant premises including a clothes shop, charity shop, deli and wine shop. Teddington, which has historically had very low vacancy rates, has experienced a clear increase in vacancies making it the main centre with the highest percentage vacancy rate. In terms of numbers of vacant outlets, it is ranked the second lowest amongst these larger centres. Significantly, less than half of new vacancies in Teddington are vacant shops as illustrated later in Figure 1 of Section 4.
- 4.1.3 Appendix 1 presents maps showing the location of vacancies in the 5 main centres, which are summarised below:

Richmond

- There are no vacant shops on the main shopping street, George Street.
- There are two vacant shops at 12 & 14 Hill Street, one of which is the recent⁶ closure of jewellers.
- There is a group of 3 vacant shops on Sheen Road (Lichfield Terrace), one of which was under refurbishment when the survey was undertaken. The vacant restaurant at No 13 Lichfield Terrace has been let according to the relevant commercial agent's website.
- Other vacant units which are not shops are spread throughout the centre.

Whitton

- There are only 4 vacancies within the main centre boundary⁷, 3 of which are shops. There are no obvious agglomerations: one is located in key shopping frontage, one in secondary shopping frontage, and the other is a vacant kiosk within the rail station concourse.

Twickenham

- There are no shop vacancies in the core retail areas of King Street and London Road, indeed only one non-shop vacancy.
- There are several vacant shops in York Street/Church Street area, mostly small units with the exception of the former rugby store⁸.
- Elsewhere the double unit which accommodated the former Morrisons Local, Heath Road was vacant when surveyed⁹.
- At the western end of Heath Road there are two sites showing as vacant retail, one of which has a flexible permission for a number of town centre uses with a similar permission currently being sought for the other.

⁶ open at time of 2015 Survey

⁷ Figures presented in the tables for Whitton includes a small group of shops on Hounslow Road

⁸ It is noted that when this report was published in February 2017, the double unit has been occupied by Hugo Oliver bathroom store.

⁹ It is noted that when this report was published in February 2017, the double unit has been occupied by Screwfix

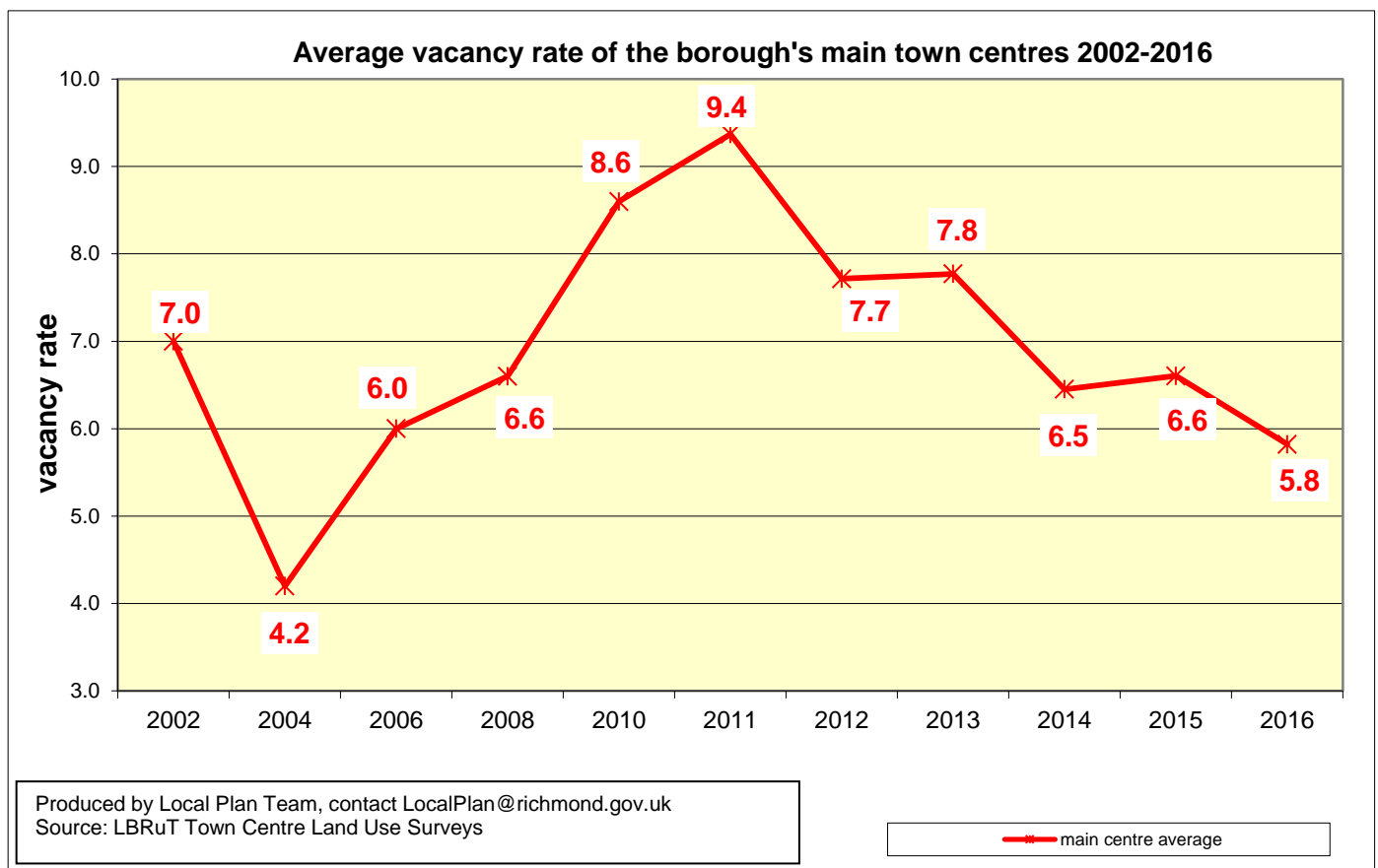
Teddington

- Teddington has few vacancies. However, there are currently fewer vacant shops in the High Street end of the centre than in Broad Street. The unit formerly occupied by Bed City remains vacant. 20 The Causeway, a former wine shop, is a long term vacant unit that was granted permission for change of use to offices in May 2016.
- There are two vacancies on the northern side of Broad Street, one of which is the relatively short-lived Morrisons Local.
- Non-shop vacancies are to be found in both the High Street and Broad Street and also in The Causeway.

East Sheen

- Vacancies are generally located at the periphery of the centre in secondary and non-designated shopping frontages where there is greater flexibility for change of use. In fact there are only 2 vacant shops and one vacant restaurant in key shopping frontage.

4.1.4 **Vacancy rates in the borough’s larger centres remain very low compared to the national figure of c11%¹⁰. In fact, the average for the 5 main centres is approximately half that of the UK average. Centre vacancies rates appear to be on a downward trend, with no discernible increase since 2011.**



¹⁰ NB figures for national vacancy rates will differ by data provider. The GOAD UK average outlet vacancy rate for June 2016 was 11.17% in December 2016 it rose only slightly to 11.19%. The British Retail Consortium in conjunction with Springboard estimated an average UK vacancy rate of 9.5% in October 2016 as part of their quarterly monitoring.

- 4.1.5 **Centre vacancy rates are generally lower in designated shopping frontages**¹¹ and average 4.9% in key shopping frontage, 6.2% in secondary shopping frontage, with the overall figure for designated frontages at just 5.4%. With the exception of Teddington vacancy rates in key shopping frontages are lower than in secondary shopping frontages in the 5 main centres. This is significant as planning policies are more restrictive in key shopping frontages, where loss of retail floorspace is resisted. It suggests that the retail frontages policy is working well in this respect and that a more flexible approach is not needed at this stage.

¹¹ See Development Management Plan policy DMTC3 (retail frontages) and Publication Local Plan policy LP 26 which sets out policy for parts of centres covered by key & secondary shopping frontages.

Table 3: Centre vacancy rates in the smaller centres

	key shopping frontage						secondary shopping frontage						all designated frontage					
	2008	2010	2012	2014	2015	2016	2008	2010	2012	2014	2015	2016	2008	2010	2012	2014	2015	2016
Local centres																		
Barnes	11.5	17.7	6.5	3.9	1.3	2.6	0	3.6	11.1	3.8	3.7	0.0	8.5	14.0	7.7	3.9	2.0	2.0
East Twickenham	5.3	0	5.3	10.5	21.1	11.1	5.7	13.2	9.4	9.4	17.3	0.0	5.6	9.7	8.3	9.7	18.3	2.9
Hampton Hill	0	4	3.6	3.4	0.0	0.0	4.3	4.3	4.3	6.3	8.5	2.1	2.8	2.9	4.0	5.2	5.3	1.3
Hampton Village	11.5	11.1	7.1	0.0	3.6	3.7	5	19.0	5.6	5.6	5.6	0.0	8.7	9.1	6.5	2.2	4.3	2.2
Ham Parade	3.3	3.3	0.0	6.7	6.7	6.7	0	0	0	0.0	25.0	0.0	2.9	2.9	0.0	5.9	8.8	5.9
Kew Gardens Station	4.3	4.2	4.0	4.0	8.0	4.2	0	6.3	6.3	6.3	6.3	6.3	2.6	5.0	4.9	4.9	7.3	5.0
St Margarets	3.2	0	3.2	3.2	6.5	0.0	3.1	6.3	6.3	6.3	3.1	9.4	3.2	3.2	4.8	4.8	4.8	4.8
Average		8.5	4.6	4.2	5.1	3.4		8.5	7.0	6.6	9.2	2.6		8.5	5.7	5.3	6.9	3.0
Neighbourhood centres																		
Castelnau	8.7	13.0	8.7	8.7	13.0	0.0	n/a	n/a	n/a	n/a	n/a	n/a	8.7	13.0	8.7	8.7	13.0	0.0
Friars Stile Road*	0.0	11.8	0.0	0.0	17.6	6.3	0.0	50.0	n/a	n/a	n/a	n/a	0.0	19.0	0.0	0.0	17.6	6.3
Hampton Wick*	9.1	0.0	0.0	12.5	12.5	25.0	n/a	n/a	n/a	n/a	n/a	n/a	9.1	0.0	0.0	12.5	12.5	25.0
Heathside	0.0	13.3	13.3	0.0	0.0	0.0	7.7	0.0	0.0	0.0	0.0	7.7	3.6	7.1	7.1	0.0	0.0	3.6
Sheen Road	11.1	11.1	11.1	0.0	0.0	11.1	0.0	0.0	25.0	0.0	0.0	0.0	6.3	6.3	17.6	0.0	0.0	6.3
Kingston Road	6.7	13.3	6.7	6.7	13.3	6.7	0.0	16.7	16.7	0.0	50.0	0.0	4.8	14.3	9.5	4.8	23.8	5.6
Stanley Road	4.5	9.5	4.8	0.0	4.8	0.0	7.1	14.3	13.3	13.3	13.3	6.7	5.6	11.4	8.3	5.6	8.3	2.8
White Hart Lane	9.5	9.1	4.5	9.1	13.6	4.8	0.0	9.5	9.5	4.8	4.8	4.8	4.8	9.3	7.0	7.0	9.3	4.8
Average		10.5	6.2	4.7	10.0	4.7		10.8	11.3	4.8	9.7	5.1		10.6	7.9	4.7	9.9	4.8
Local parades																		
Ashburnham Road	0.0	0.0	0.0	0.0	0.0	0.0	n/a	n/a	n/a	n/a	n/a	n/a	0.0	0.0	0.0	0.0	0.0	0.0
Fulwell	22.2	22.2	11.1	0.0	0.0	11.1	n/a	n/a	n/a	n/a	n/a	n/a	22.2	22.2	11.1	0.0	0.0	11.1
Ham Street / Back Lane	23.1	0.0	7.7	9.1	23.1	15.4	0.0	40.0	25.0	0.0	0.0	0.0	17.6	11.1	11.8	6.7	17.6	11.8
Hampton Nursery Lands	0.0	0.0	0.0	0.0	0.0	0.0	n/a	n/a	n/a	n/a	n/a	n/a	0.0	0.0	0.0	0.0	0.0	0.0
Hospital Bridge Road	0.0	16.7	0.0	0.0	0.0	0.0	n/a	n/a	n/a	n/a	n/a	n/a	0.0	16.7	0	0.0	0.0	0.0
Kew Green	11.1	11.1	12.5	12.5	12.5	12.5	n/a	n/a	n/a	n/a	n/a	n/a	11.1	11.1	12.5	12.5	12.5	12.5
Kew Road	n/a	n/a	n/a	n/a	n/a	n/a	7.1	3.6	7.1	3.4	0.0	3.4	7.1	3.6	7.1	3.4	0.0	3.4
Lower Mortlake Road	9.1	9.1	9.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.3	8.3	8.3	0.0	0.0	0.0
Nelson Road	9.1	27.3	27.3	18.2	9.1	18.2	n/a	n/a	n/a	n/a	n/a	n/a	9.1	27.3	27.3	18.2	9.1	18.2
Sandycombe Road**	16.7	16.7	0.0	0.0	0.0	0.0	0.0	16.7	0.0	0.0	0.0	0.0	8.3	16.7	0	0.0	0.0	0.0
Strawberry Hill	14.3	14.3	7.1	14.3	0.0	0.0	n/a	n/a	n/a	n/a	n/a	n/a	14.3	14.3	7.1	14.3	0.0	0.0
Twickenham Green	11.8	17.6	27.8	22.2	16.7	11.1	n/a	n/a	n/a	n/a	n/a	n/a	11.8	17.6	27.8	22.2	16.7	11.1
Waldegrave Road	10.0	10.0	10.0	20.0	10.0	10.0	0.0	0.0	0.0	0.0	0.0	0.0	7.1	7.1	7.1	14.3	7.1	7.1
St Margarets Road*	n/a	n/a	n/a	n/a	n/a	n/a	25.0	25.0	25.0	25.0	25.0	12.5	25.0	25.0	25	25.0	25.0	12.5
Whitton Road	16.7	16.7	0.0	0.0	0.0	n/a	n/a	n/a	n/a	n/a	n/a	n/a	16.7	22.2	0.0	0.0	0.0	0.0
Average		12.9	11.2	9.8	7.3	7.2		11.5	9.6	5.8	3.8	3.8		12.5	10.7	8.6	6.3	6.3

	centre vacancy rate (all frontages)							number of vacant units		
	2008	2010	2012	2013	2014	2015	2016	2014	2015	2016
Local centres										
Barnes	2.3	12.3	6.3	4.7	4.0	2.4	2.4	5	3	3
East Twickenham	6.4	9.1	7.8	6.5	9.1	17.1	2.7	7	13	2
Hampton Hill	4.0	7.8	7.0	6.2	10.6	11.4	6.2	14	15	8
Hampton Village	6.3	12.3	5.1	2.6	2.5	5.1	2.5	2	4	2
Ham Parade	2.4	7.3	2.4	2.4	7.0	7.0	7.0	3	3	3
Kew Gardens Station	2.0	4.0	3.8	3.9	3.9	5.9	4.1	2	3	2
St Margarets	4.5	3.0	4.5	6.0	4.5	4.5	4.4	3	3	3
Average/total			5.7	4.9	6.3	7.7	4.0	36	44	23
Neighbourhood centres										
Castelnau	8.3	12.5	8.3	12.5	8.3	12.5	0.0	2	3	0
Friars Stile Road	0.0	19.0	9.5	14.3	5.0	14.3	5.3	1	3	1
Hampton Wick	15.1	20.0	23.6	22.2	20.7	29.8	11.1	12	17	5
Heathside	3.0	6.1	6.1	9.1	0.0	0.0	3.0	0	0	1
Sheen Road	17.5	7.3	11.9	4.9	4.7	4.9	6.5	2	2	3
Kingston Road	4.2	14.3	9.5	0.0	4.8	23.8	5.6	1	5	1
Stanley Road	6.5	8.9	6.7	8.9	4.4	6.7	4.4	2	3	2
White Hart Lane	10.0	10.2	8.5	8.3	8.3	13.3	5.4	5	8	3
Average/total			11.4	10.7	8.2	13.6	5.6	25	41	16
Local parades										
Ashburnham Road	12.5	0.0	0.0	0.0	0.0	0.0	0.0	0	0	0
Fulwell	16.7	25.0	16.7	0.0	0.0	0.0	8.3	0	0	1
Ham Street / Back Lane	25.0	10.5	11.1	5.6	6.3	16.7	11.1	1	3	2
Hampton Nursery Lands	9.1	0.0	0.0	0.0	0.0	0.0	0.0	0	0	0
Hospital Bridge Road	0.0	16.7	0.0	0.0	0.0	0.0	0.0	0	0	0
Kew Green	5.6	5.3	11.1	11.1	5.3	5.3	5.3	1	1	1
Kew Road	11.8	5.9	8.8	5.7	2.9	0.0	2.9	1	0	1
Lower Mortlake Road	10.5	6.3	5.9	0.0	0.0	0.0	0.0	0	0	0
Nelson Road	9.1	27.3	27.3	27.3	18.2	9.1	18.2	2	1	2
Sandycombe Road**	12.5	19.5	7.0	4.7	7.0	4.7	5.1	3	2	2
Strawberry Hill	14.3	14.3	7.1	14.3	14.3	0.0	0.0	2	0	0
Twickenham Green	12.2	12.2	16.7	14.3	23.8	14.3	11.4	10	6	5
Waldegrave Road	13.3	13.3	13.3	13.3	13.3	6.7	6.7	2	1	1
St Margarets Road*	27.3	27.3	27.3	27.3	27.3	18.2	9.1	3	2	1
Whitton Road	15.4	20.0	6.7	6.7	0.0	6.7	28.6	0	1	4
Average/total			10.9	8.7	9.0	6.1	7.1	25	17	20

Notes:

Red indicates an increase in the rate between 2015 and 2016, black no change, and **blue** a fall in the rate.

If the actual number of vacancies has remained the same the colour coding will be shown as black, there may be some marginal change in the percentage because the denominator has changed, due to amalgamation/ splitting of units in the centre.

* St Margarets Road (parade north of the A316)

** Sandycombe Road (Kew)

4.1.6 As with the larger centres, average vacancy rates in local centres, neighbourhood centres and parades of local importance were significantly lower than the national average. All local centres have seen vacancy rates fall or remain the same between 2015 & 2016. This improvement has also been most notable for the neighbourhood centre average, dropping from 13.6% in 2015 to only 5.6% in 2016. Numbers of vacancies in local parades have risen slightly by 3 between 2015 and 2016. However of the 15 local parades, a third have no vacancies at all and all but 2 (Twickenham Green and Whitton Road) have 2 or fewer vacant units.

Local centres

4.1.7 The vacancy rates in local centres are extremely low averaging only 4%, which drops to only 3% in designated shopping frontages. In 2015 Hampton Hill and East Twickenham had the highest vacancy rates (11.4% and 17.1% respectively). Both centres have seen vacancy rates fall substantially between 2015 and 2016. Hampton Hill still has a number of long term vacancies but several businesses have opened over the period including a dry cleaners, coffee bar, restaurant, office, accountant and coffee bar. In addition, change of use from office to residential under permitted development rights have been completed at one site (55 High Street). Other similar permissions in and adjacent to the High Street are in the pipeline.

4.1.8 In 2015 much of the overall increase in number of vacant units in local centres was attributed to a significant increase in East Twickenham from 7 in 2014 to 13 in 2015. In 2016 the survey only records 2 vacancies¹², one of which was a refit. New businesses which have opened in the centre include a new convenience store, hairdresser, carpet shop, florist and café.

4.1.9 Ham Parade has experienced change in the mix of businesses over the past year and is in a period of transition resulting from a change to permitted development rights introduced by government, allowing change of use from shops (A1 Use Class) to financial and professional services, such as banks and estate agents (A2 uses). The number of A2 uses has doubled from 3 to 6, with a further outstanding permission which is recorded as vacant, awaiting implementation. In response to this change to permitted development rights, the Council has made an Article 4 Direction to restrict this permitted development right, which covers a number of centres across the borough. In the case of Ham Parade the Article 4 Direction covers the majority of commercial units. It will come into force on 1 April 2017. In addition, there were two further vacancies when Ham Parade was surveyed, both relate to premises which were seeking planning permission, one for an extension to a shop for another retailer, and another for change of use from a shop to residential. It is therefore anticipated that vacancy levels will return to relatively low levels in due course, albeit that the mix of businesses will have changed.

Neighbourhood centres

4.1.10 For neighbourhood centres, the picture is also positive. The overall vacancy rate has dropped significantly over the period. Of note are:

- Hampton Wick – the vacancy rate has dropped in this centre from almost 30% to 11% which is a significant decrease. This is primarily due to a change in calculating the rate to exclude premises which are development sites under construction¹³. These sites cannot be occupied and have recently pushed up rates. This change better reflects the centre's demand for retail and its economic health. As a result sites such as 6-10 High Street and 59-61 High Street are not included. In addition residential properties in non-designated frontages have been excluded also which affects the denominator. Hampton Wick has experienced a great deal of change to its High Street through the government's introduction of permitted development rights (allowing change of use from office to residential¹⁴). Again, this has reduced the number of units recorded as vacant, as well as

¹² Figures do not include the site at 383-385 Richmond Road which forms part of the redevelopment to accommodate a new Lidl supermarket for which an application is currently being considered.

¹³ This does not include units being internally refurbished/refit.

¹⁴ This permitted development right has been withdrawn for the majority of Hampton Wick and elsewhere by an Article 4 Direction which came into force on 1 October 2016.

reducing, in all likelihood permanently, the centre's office stock. The centre has not been without any investment recently. New businesses include a new café, an architect and sports development centre/gym. However, the short-lived electric bike shop which occupied a newly built double retail unit has closed.

- Both Kingston Road and White Hart Lane had experienced a sharp increase in vacancies between 2014 and 2015. The latest figures have returned to at or below 2014 levels.

Local parades

4.1.11 For local parades, the picture is slightly less positive, being the only tier in the centre hierarchy where vacancies have risen slightly. In most cases there have been marginal changes between 2015 & 2016. Whitton Road parade has experienced a notable increase in vacancies in part due to the redevelopment of several premises which are as yet unlet. All vacancies in Whitton Road are in non-designated frontage where there is a large degree of flexibility for change of use. In addition none of the vacancies in this parade are vacant shops.

Permitted development rights

4.1.12 The impact of changes to permitted development rights¹⁵ has had a significant impact in this borough with properties being converted at time of survey resulting in a temporary increase in vacancy rates in some centres. Hampton Wick is an example of this in that vacancies have dropped dramatically between 2015 and 2016 as explained above, and this can in part be explained by prior approval permissions for change of use to residential from office having been built out.

Designated frontages

4.1.13 Average vacancy rates in local and neighbourhood centres and local parades in designated frontages are all lower than the overall centre vacancy rate.

Table 4: Summary Table: All Vacancies

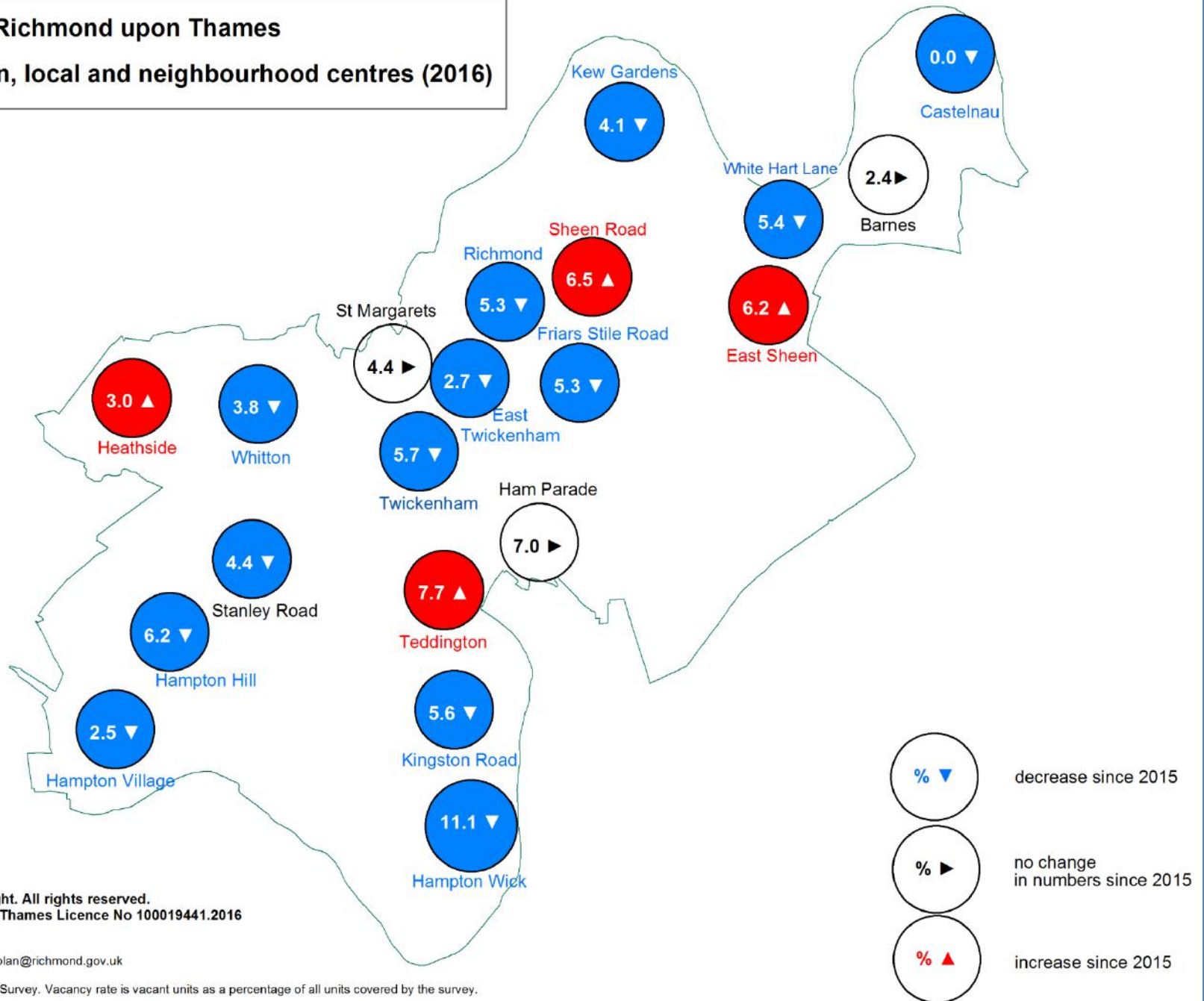
	2011	2012	2013	2014	2015	2016
In designated shopping frontages:¹						
total number of vacancies	170	141	127	114	125	91
Of which:						
main centres	96	82	79	67	65	58
local centres	33	25	18	23	30	13
neighbourhood centres	16	15	14	9	19	9
local parades	25	19	16	15	11	11
Vacancy rate (%)	9.0	7.5	6.8	6.1	6.7	4.9
	2011	2012	2013	2014	2015	2016
In all frontages:						
Total number of vacancies	233	195	183	168	186	133
Vacancy rate (%)	9.6	8.1	7.6	6.9	7.7	5.5

Source: LBRuT Town Centre Land Use Surveys. Produced by Local Plan Team

¹ See Development Management Plan policy DMTC3 (retail frontages) and Publication Local Plan policy LP 26 which sets out policy for parts of centres covered by key & secondary shopping frontages.

¹⁵ Permitted development rights are a national grant of planning permission which allow certain building works and changes of use to be carried out without having to make a planning application.

London Borough of Richmond upon Thames
Vacancy rates in main, local and neighbourhood centres (2016)

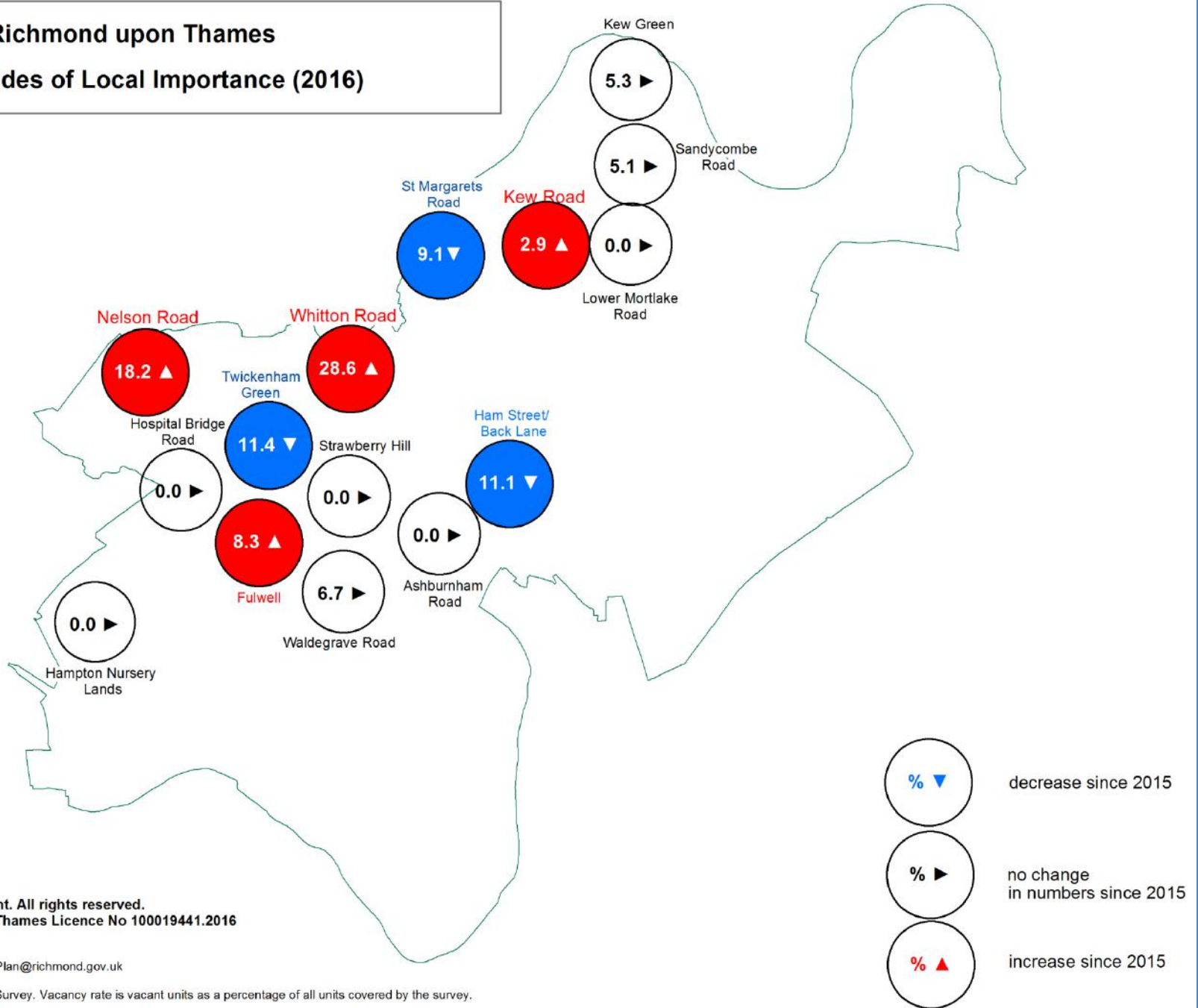


Based on OS data. (c) Crown copyright. All rights reserved.
London Borough of Richmond upon Thames Licence No 100019441.2016

Local Plan designations
Produced by Local Plan Team. Contact localplan@richmond.gov.uk

source: LBRuT 2016 Town Centre Land Use Survey. Vacancy rate is vacant units as a percentage of all units covered by the survey.

**London Borough of Richmond upon Thames
Vacancy rates in Parades of Local Importance (2016)**



Based on OS data. (c) Crown copyright. All rights reserved.
London Borough of Richmond upon Thames Licence No 100019441.2016

Local Plan designations
Produced by Local Plan Team. Contact LocalPlan@richmond.gov.uk

source: LBRuT 2016 Town Centre Land Use Survey. Vacancy rate is vacant units as a percentage of all units covered by the survey.

5 Shop Vacancy Rates

- 5.1.1 This section of the report provides statistics on **vacant shops** specifically, in order to provide information on the health of the retail sector in the borough. This is in part a response to national concerns that the bricks and mortar element of the retail sector is in decline, in the most part from the growth in multi-channel retailing, in particular in internet shopping. As mentioned earlier, the closure of a shop is often the ultimate proof that the business was not viable and may come at the end of a long period of difficulty. Vacancy rates are therefore an accurate, but not necessarily an instantly responsive indicator of change. However, it is expected that some businesses will close and others open in centres in the course of a year.
- 5.1.2 Vacant shops have been analysed since 2012. In 2015 8.8% of shops were vacant. The 2016 figures are significantly better than those for last year, with rates having fallen to just 6.1%. Between 2015 & 2016 the number of vacant outlets has fallen by 36 from 113 to a low figure of 77. Numbers of vacant shops are easily at their lowest since monitoring began in 2012. Although positive, we should be cautious in drawing conclusions until a trend is confirmed by future data.

Table 5: Summary Table: Vacant shops

Vacant shops:	2012	2013	2014	2015	2016
total number of shop vacancies	125	116	100	113	77
Of which:					
main centres	66	64	55	58	44
local centres	20	15	16	21	14
neighbourhood centres	22	21	14	25	10
local parades	18	16	15	9	9
Shop vacancy rate (number of vacant shops as a proportion of all shops)	9.4%	8.8%	7.7%	8.8%	6.1%

Source: LBRuT Town Centre Land Use Surveys. Produced by Local Plan Team.

- 5.1.3 Shop vacancies have fallen notably in Richmond, Twickenham, Whitton and East Twickenham. Only 7 of the 35 centres have experienced an increase in shop vacancies, none being more than a marginal increase (a maximum of an additional 3 units in the main centres or 2 elsewhere).

Table 5: Vacant shops (A1 Use Class – includes A1 services)

centres & parades in the borough hierarchy	number of vacant shops					percentage of shops which are vacant					actual change in vacant shops		% of vacancies which are shops	
	2012	2013	2014	2015	2016	2012	2013	2014	2015	2016	2014-15	2015-16	2015	2016
main centres														
Richmond	22	13	14	17	10	10.1	6	6.6	8.2	4.8	3	-7	65.4	52.6
East Sheen	14	16	11	10	13	8.4	9.6	6.5	5.9	7.8	-1	3	71.4	72.2
Teddington	4	5	2	4	7	3.6	4.5	1.8	3.6	6.7	2	3	57.1	46.7
Twickenham	16	22	21	18	11	10.5	14.5	14.2	12.1	7.2	-3	-7	72.0	64.7
Whitton	10	8	7	9	3	13.2	10.5	9.7	12.5	4.1	2	-6	75.0	60.0
main centre total/average	66	64	55	58	44	9.0	8.9	7.7	8.2	6.2	3	-14	69.0	59.5
local centres														
Barnes	7	4	1	1	2	10	5.7	1.4	1.4	2.9	0	1	33.3	66.7
East Twickenham	4	3	3	7	1	8.5	6.4	6.5	17.1	2.3	4	-6	53.8	50.0
Hampton Hill	5	5	7	7	4	7.7	7.7	12.3	12.3	6.8	0	-3	46.7	50.0
Hampton Village	2	1	1	2	1	4.5	2.3	2.3	4.8	2.4	1	-1	50.0	50.0
Ham Parade	0	0	2	1	3	0	0	8.7	4.2	14.3	-1	2	33.3	100.0
Kew Gardens Station	0	0	0	1	2	0	0	0	3.8	8.0	1	1	33.3	100.0
St Margarets	2	2	2	2	1	5.3	5.3	5.1	5.1	2.6	0	-1	66.7	33.3
local centre total/average	20	15	16	21	14	6.3	4.7	5.3	7.0	4.7	5	-7	47.7	60.9
neighbourhood centres														
Castelnau	1	2	1	2	0	9.1	18.2	9.1	20.0	0.0	1	-2	66.7	0.0
Friars Stile Road	2	2	1	3	0	14.3	14.3	8.3	33.3	0.0	2	-3	100.0	0.0
Hampton Wick	6	7	5	7	3	27.8	38.9	26.3	43.8	20.0	2	-4	41.2	60.0
Heathside	2	3	0	0	0	11.8	17.6	0	0.0	0.0	0	0	0.0	0.0
Sheen Road	3	0	0	1	1	15.8	0	0	5.3	5.3	1	0	50.0	33.3
Kingston Road	2	0	1	4	1	13.3	0	7.7	40.0	9.1	3	-3	80.0	100.0
Stanley Road	2	3	1	1	2	8.7	13	4	4.0	8.3	0	1	33.3	100.0
White Hart Lane	4	4	5	7	3	12.9	12.9	16.7	25.0	10.7	2	-4	87.5	100.0
neighbourhood centre total/average	22	21	14	25	10	15.0	14.4	9.3	18.2	7.3	11	-15	61.0	62.5

centres & parades in the borough hierarchy	number of vacant shops					percentage of shops which are vacant					actual change in vacant shops		% of vacancies which are shops	
	2012	2013	2014	2015	2016	2012	2013	2014	2015	2016	2014-15	2015-16	2015	2016
local parades														
Ashburnham Road	0	0	0	0	0	0	0	0	0.0	0.0	0	0	0.0	0.0
Fulwell	1	0	0	0	0	16.7	0	0	0.0	0.0	0	0	0.0	0.0
Ham Street / Back Lane	2	1	1	2	2	22.2	11.1	12.5	25.0	22.2	1	0	66.7	100.0*
Hampton Nursery Lands	0	0	0	0	0	0	0	0	0.0	0.0	0	0	0.0	0.0
Hospital Bridge Road	0	0	0	0	0	0	0	0	0.0	0.0	0	0	0.0	0.0
Kew Green	2	2	1	1	1	18.2	18.2	11.1	11.1	11.1	0	0	100.0	100.0*
Kew Road	1	1	0	0	1	6.3	6.3	0	0.0	7.7	0	1	0.0	100.0*
Lower Mortlake Road	1	0	0	0	0	10	0	0	0.0	0.0	0	0	0.0	0.0
Nelson Road	2	2	1	1	1	33.3	33.3	14.3	14.3	14.3	0	0	100.0	50.0
Sandycombe Road (Kew)	1	1	1	0	0	5.9	5.9	6.3	0.0	0.0	-1	0	0.0	0.0
Strawberry Hill	1	2	2	0	0	14.3	28.6	28.6	0.0	0.0	-2	0	0.0	0.0
Twickenham Green	4	3	4	3	2	22.2	16.7	25	16.7	11.8	-1	-1	50.0	40.0
Waldegrave Road	0	1	2	1	1	0	11.1	25	14.3	14.3	-1	0	100.0	100.0*
St Margarets Road**	3	3	3	1	1	75	75	75	20.0	20.0	-2	0	50.0	100.0*
Whitton Road	0	0	0	0	0	0	0	0	0.0	0.0	0	0	0.0	0.0
local parade total/average	18	16	15	9	9	13.6	12.0	11.7	6.9	7.0	-6	0	52.9	45.0

Source: LBRuT Annual Town Centre Land Use Surveys. Produced by Local Plan Team.

Notes:

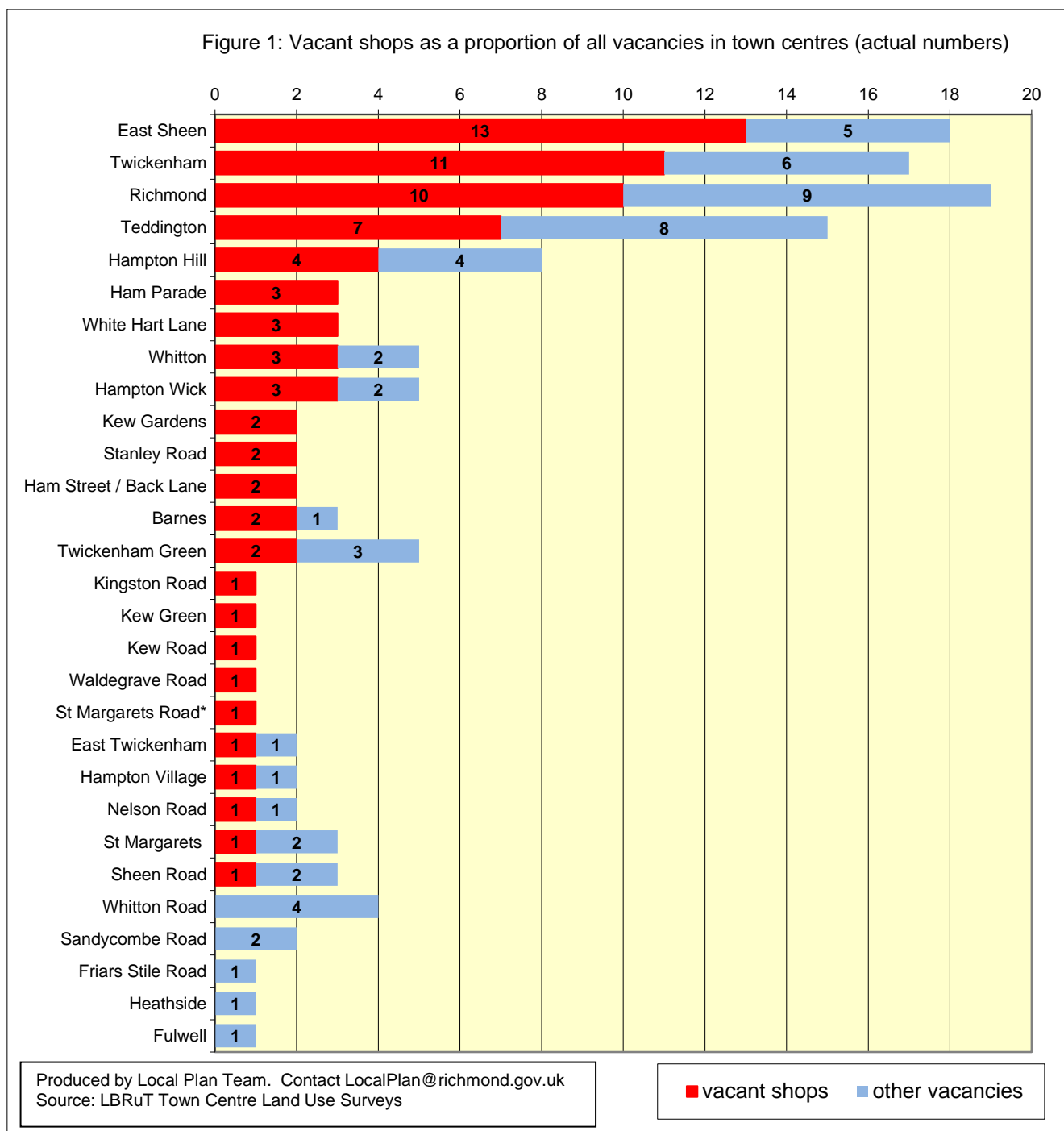
Red indicates an increase in the rate between 2015 and 2016, black no change, and **blue** a fall in the rate.

If the actual number of vacancies has remained the same the colour coding will be shown as black, there may be some marginal change in the percentage because the denominator has changed, due to amalgamation/ splitting of units in the centre.

Shops = Businesses falling within the A1 Use class includes some retail services such as Post Offices, dry cleaners, ticket offices
The figures in the table are net gains/ losses. There will be some natural change within centres, with some retailers closing and others opening.

* Although the figure is high, in each case it amounts to one vacant shop.

**St Margarets Road (parade north of the A316)



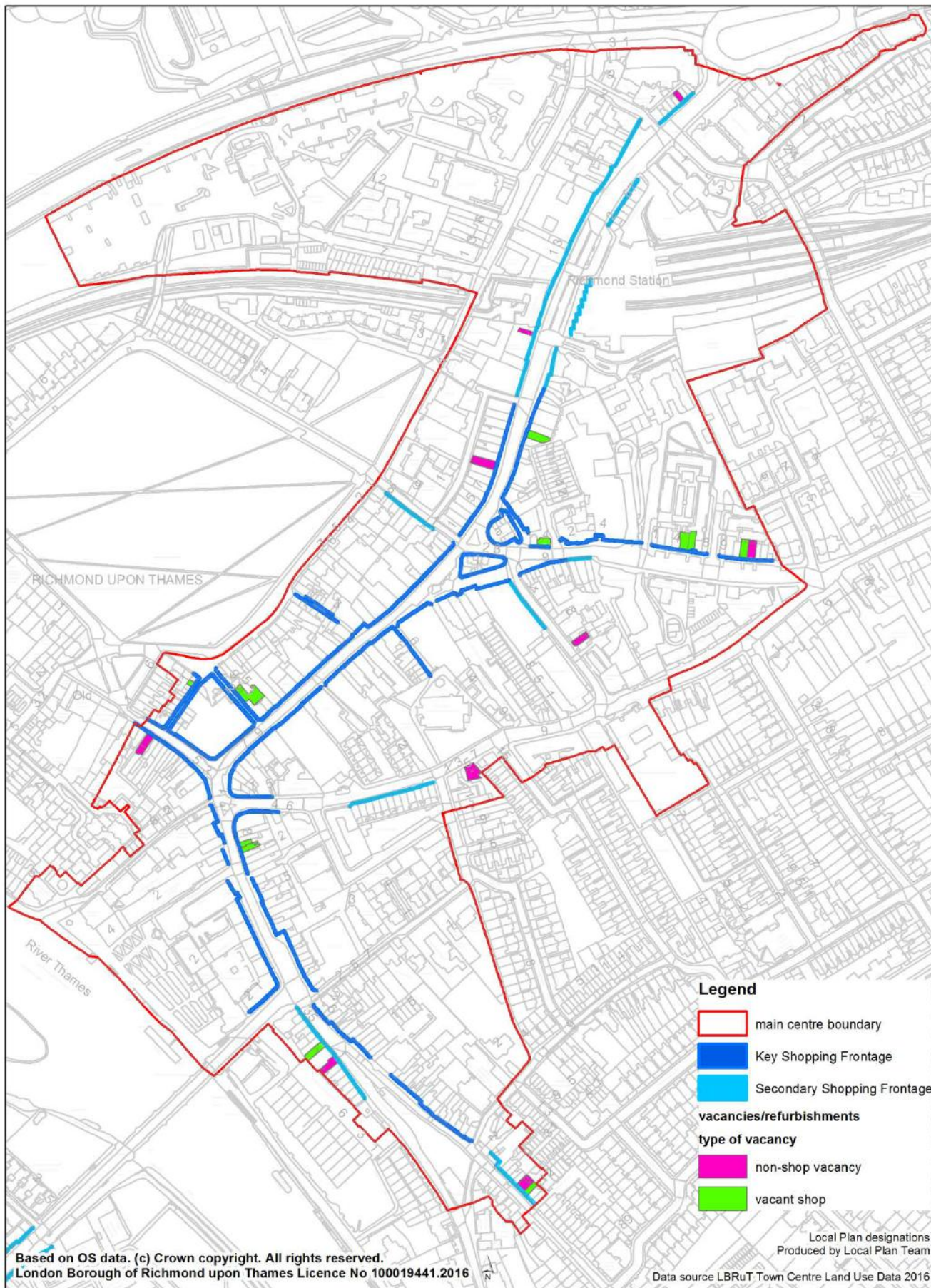
5.1.4 Approximately 57.9% of all vacancies in the borough are vacant shops or retail services (within the A1 use class). **Therefore a significant number of vacant units in the borough are not vacant shops illustrating it is not just retailers who are operating in challenging conditions.**

5.1.5 Clearly there are differences between centres in terms of how many of the vacant units are shops as illustrated above in Figure 1. In East Sheen and Twickenham vacancies are made up of a higher proportion of shops (72%), whereas in Teddington and Richmond only approximately half or less of vacancies are shops.

Appendix 1:

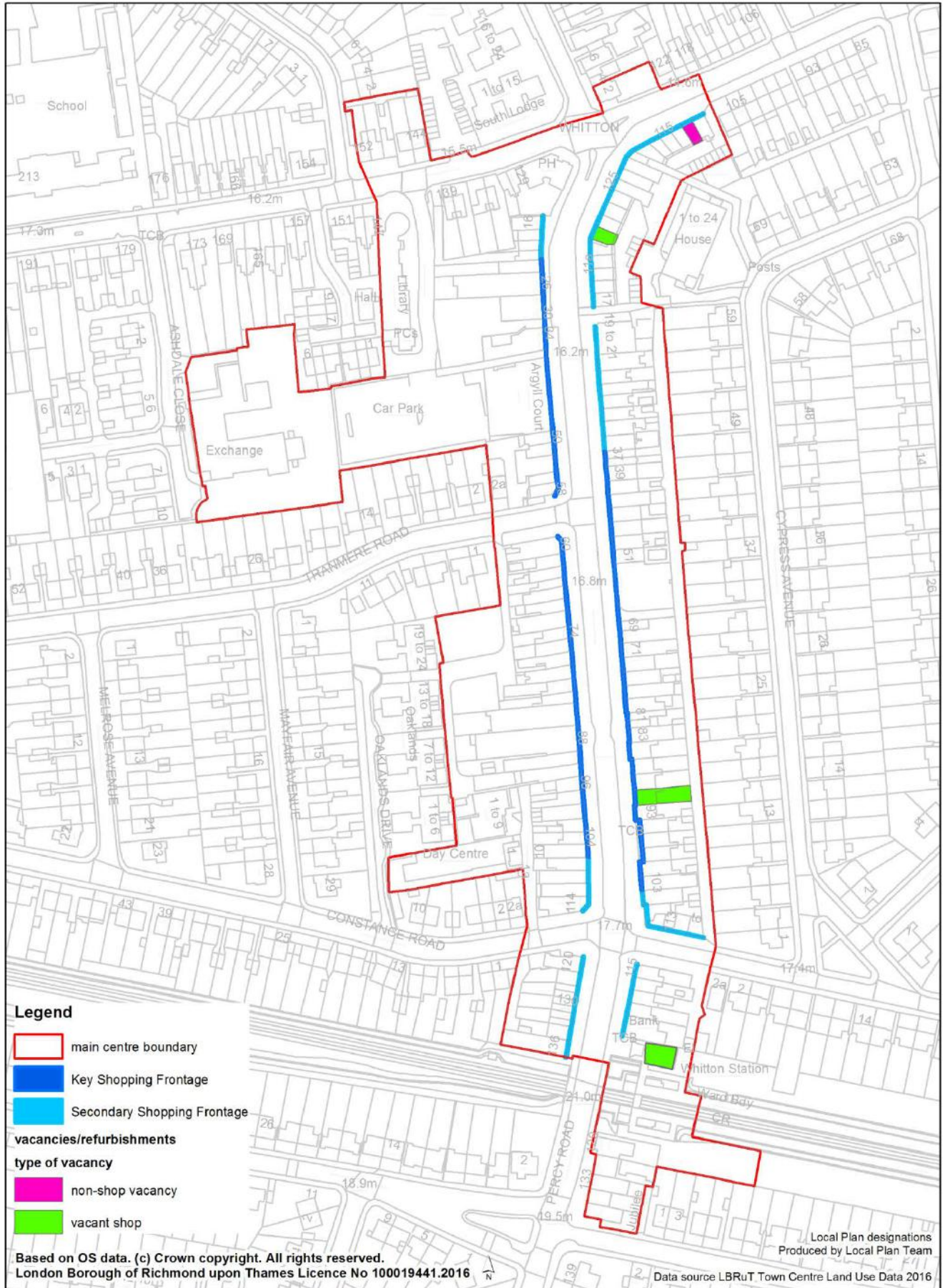
Maps of vacant units in the five main centres

Vacancies in Richmond 2016

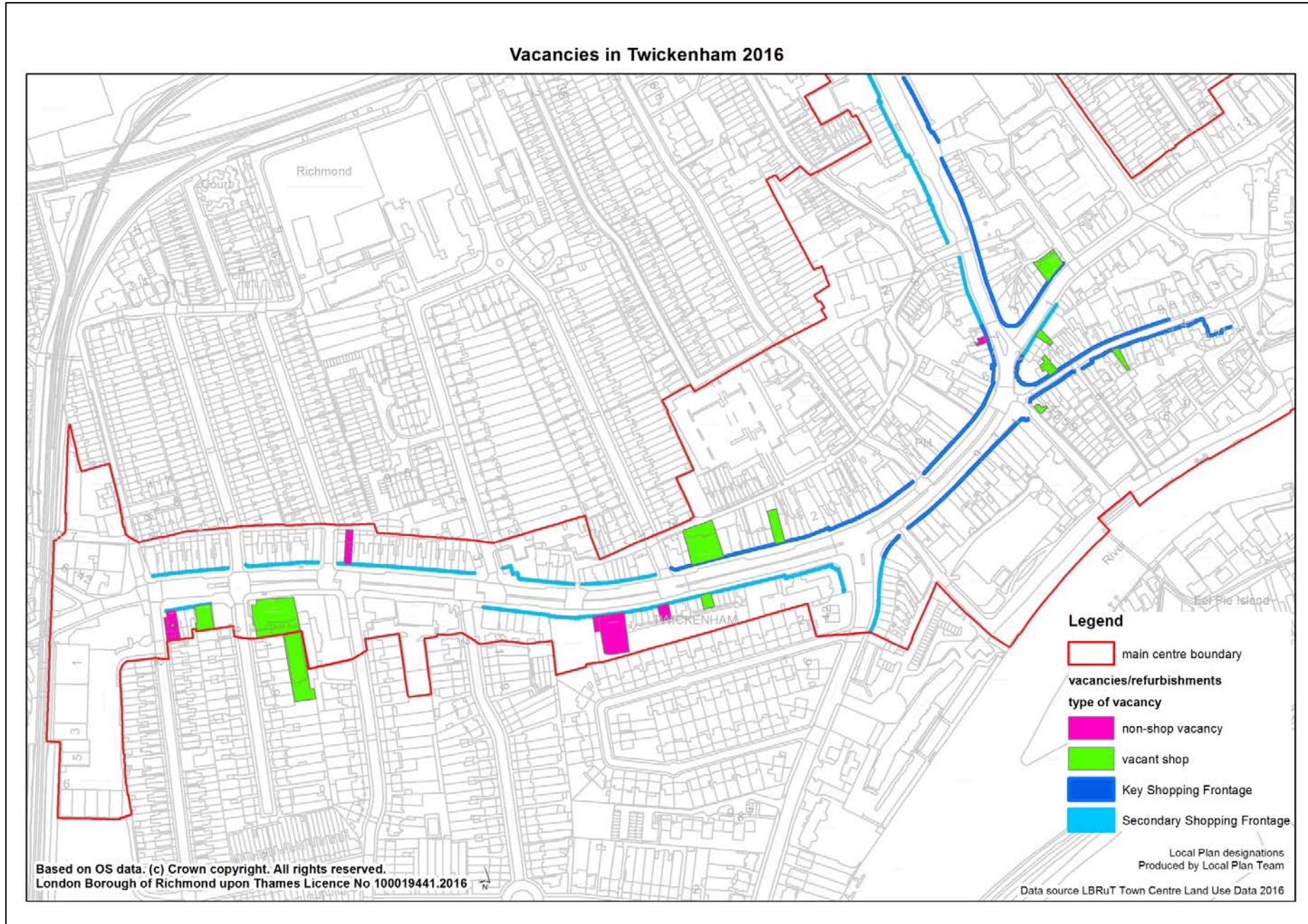


Note: 2016 Town Centre Land Use Survey fieldwork undertaken in summer months

Vacancies in Whitton 2016

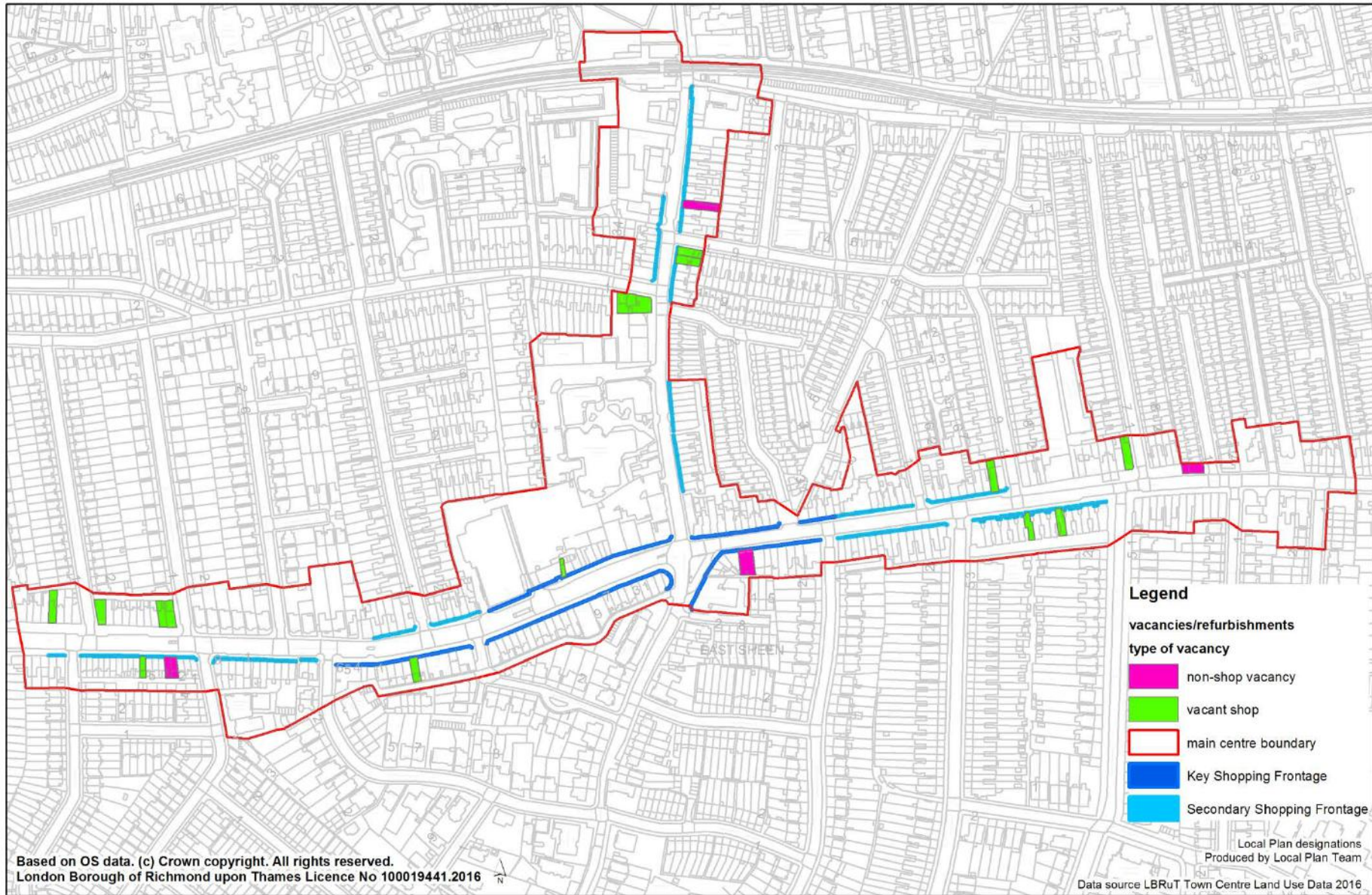


Note: One non-shop vacancy in Hounslow Road outside Whitton's main centre boundary is included in the figures
 Note: 2016 Town Centre Land Use Survey fieldwork undertaken in summer months



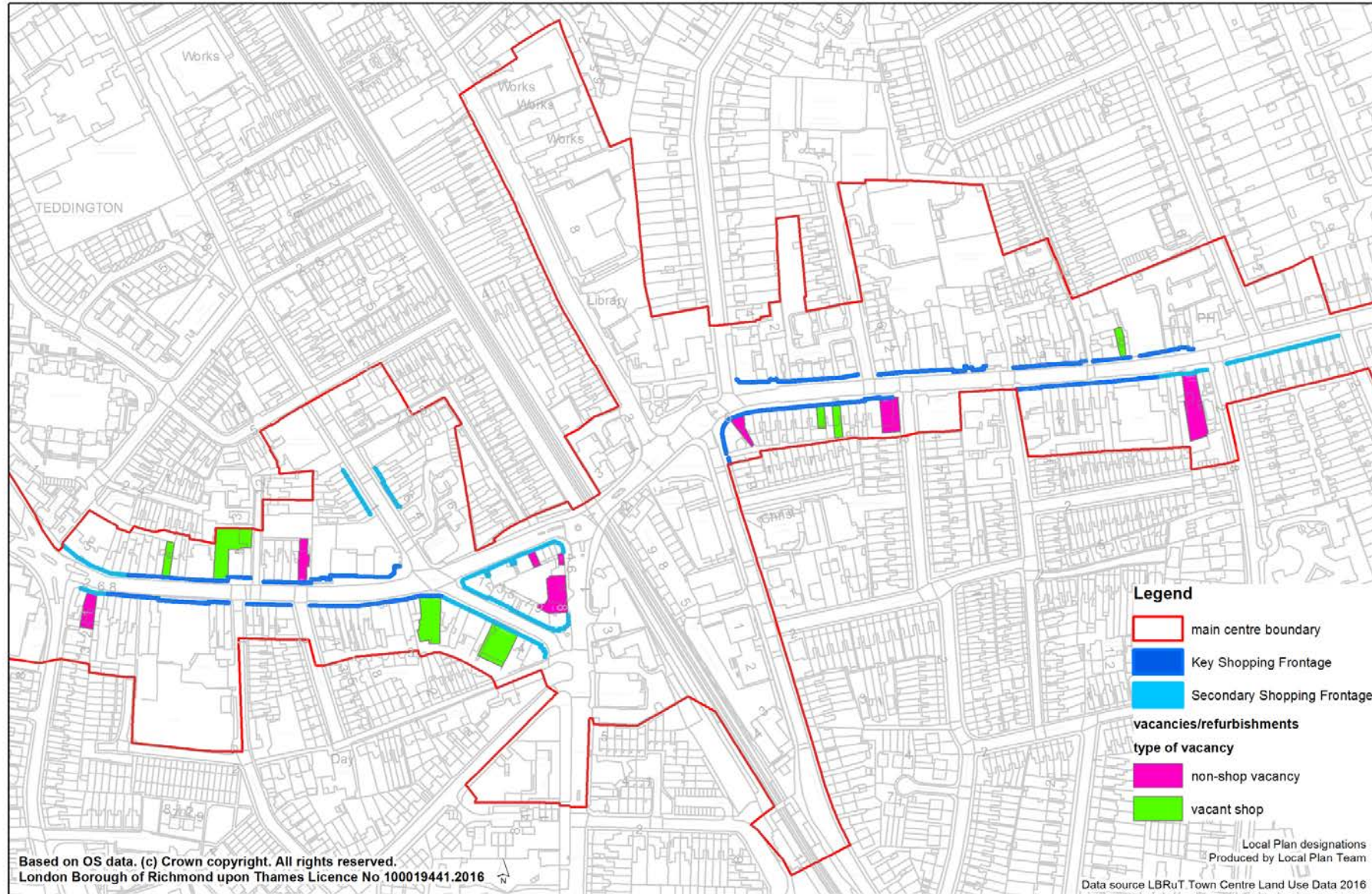
Note: 2016 Town Centre Land Use Survey fieldwork undertaken in summer months

Vacancies in East Sheen 2016



Note: 2016 Town Centre Land Use Survey fieldwork undertaken in summer months

Vacancies in Teddington 2016



Note: 2016 Town Centre Land Use Survey fieldwork undertaken in summer months



London Borough of Richmond upon Thames

Environment and Community Services Directorate

Local Plan Team

Civic Centre

44 York Street

Twickenham

Middlesex TW1 3BZ

T 020 8891 7117

www.richmond.gov.uk