

**Local Plan Monitoring Report**

## **2017 Centre Land Use Survey**

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## 1. Summary

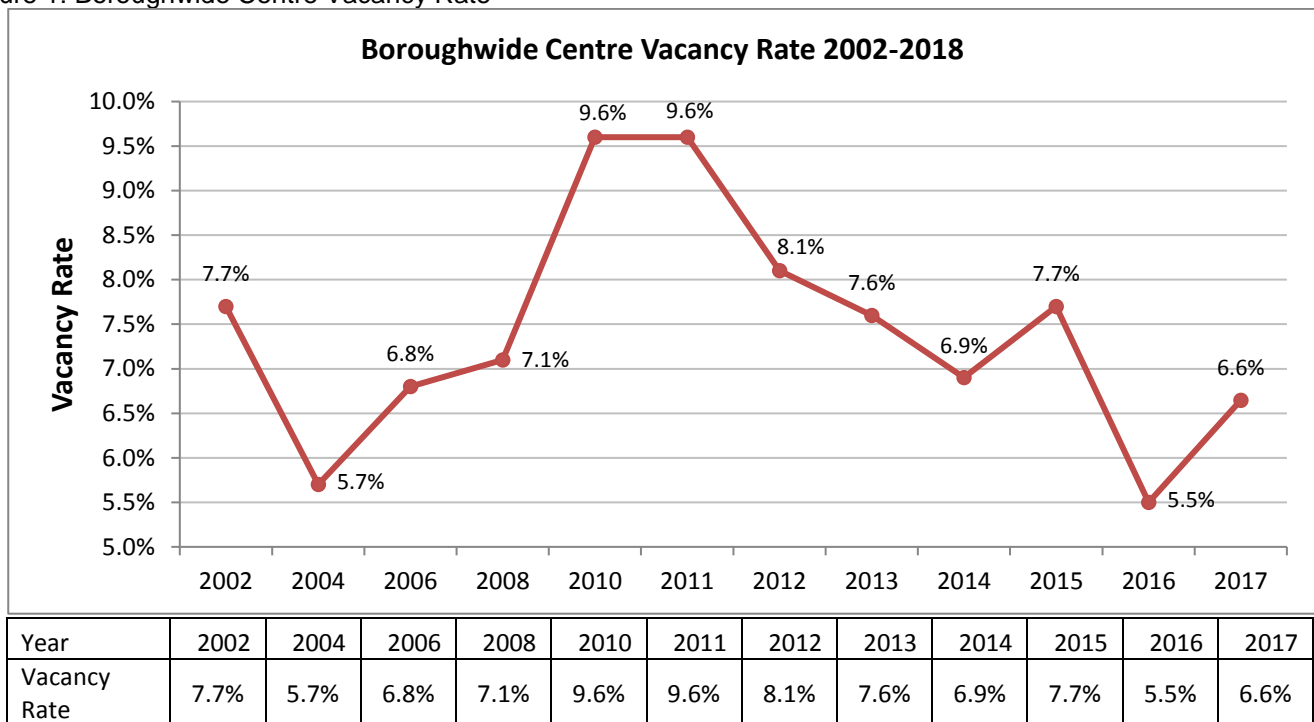
The Council surveys the ground floor occupiers in centres across the borough each year to be able to systematically monitor changes in vacancy rates and types of use. It is a snapshot survey of 2,500 properties. The key findings are as follows:

### 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 risen slightly from the previous year. In total there were 163 vacant units borough-wide in 2017 compared to 133 in 2016, 186 in 2015 and 168 in 2014.
- At 6.6% the borough centre vacancy rate continues to be low and remains well below the national average of around 11.1%.
- 5.7% of units in designated frontages were vacant in 2017, compared to 4.9% of units in 2016. Vacancy rates in designated shopping frontages are lower than in non-designated frontages.

Figure 1: Boroughwide Centre Vacancy Rate



### 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 78 vacant shops recorded by the survey in 2017 in centres across the borough. This is slightly higher than the 77 vacant shops recorded in 2016, but still well below the 113 vacant shops recorded in 2015.
- The 2017 shop vacancy rate of 5.9% is slightly lower than last year's figure of 6.1%, and below the rate in 2015 when 8.8% of shops were vacant.
- East Sheen and Richmond have the largest numbers of vacant shops which reflects their size. Vacancies in both Richmond and Teddington have fallen very slightly and across all main centres the numbers of vacant shops are similar to the 2016 figures.
- Approximately 60% 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.

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 came into effect on 1 April 2017.

## 2. Methodology

- 2.1.1 This Monitoring Report is one of several publications which assess the effectiveness of planning policies in the borough. Reports will be published in a phased approach on the Council's website<sup>1</sup>.
- 2.1.2 The Council has undertaken Land Use Surveys of borough centres in the summer months since the late 1990s. It covers approximately 2,500 properties. The Land Use Survey is a snapshot survey, undertaken by observation in the field, i.e. the researcher makes a judgement as to the nature of the occupier on that 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.
- 2.1.3 Only the ground floor occupier is recorded unless specified. It is therefore not a survey of floorspace. (Richmond has several 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.
- 2.1.4 The survey includes all businesses in designated shopping frontages in the borough.
- 2.1.5 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.
- 2.1.6 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 retailing at present, a shop vacancy rate is also reported on which is the number of vacant shops as a proportion of all shops.

## 3. Background

### 3.1.1 Structural changes to retailing

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 capital<sup>2</sup>, and the borough specifically<sup>3</sup>, still require additional retail floorspace. It is therefore important and timely to monitor vacancy rates.

#### Changes to permitted development rights:

3.2 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.

<sup>1</sup> [http://www.richmond.gov.uk/home/services/planning/planning\\_policy/local\\_plan/authority\\_monitoring\\_report.htm](http://www.richmond.gov.uk/home/services/planning/planning_policy/local_plan/authority_monitoring_report.htm)

<sup>2</sup> <http://www.london.gov.uk/priorities/planning/publications/consumer-expenditure-and-comparison-goods-retail-floorspace-need>

<sup>3</sup> [http://www.richmond.gov.uk/richmond\\_retail\\_study\\_november\\_2014.pdf](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 <sup>4</sup> .
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 force in April 2015	<b>retail to banks and building societies (deposit-takers)</b> - 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 <b>shops</b> (A1) to <b>financial and professional services</b> (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.

<sup>4</sup> 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.

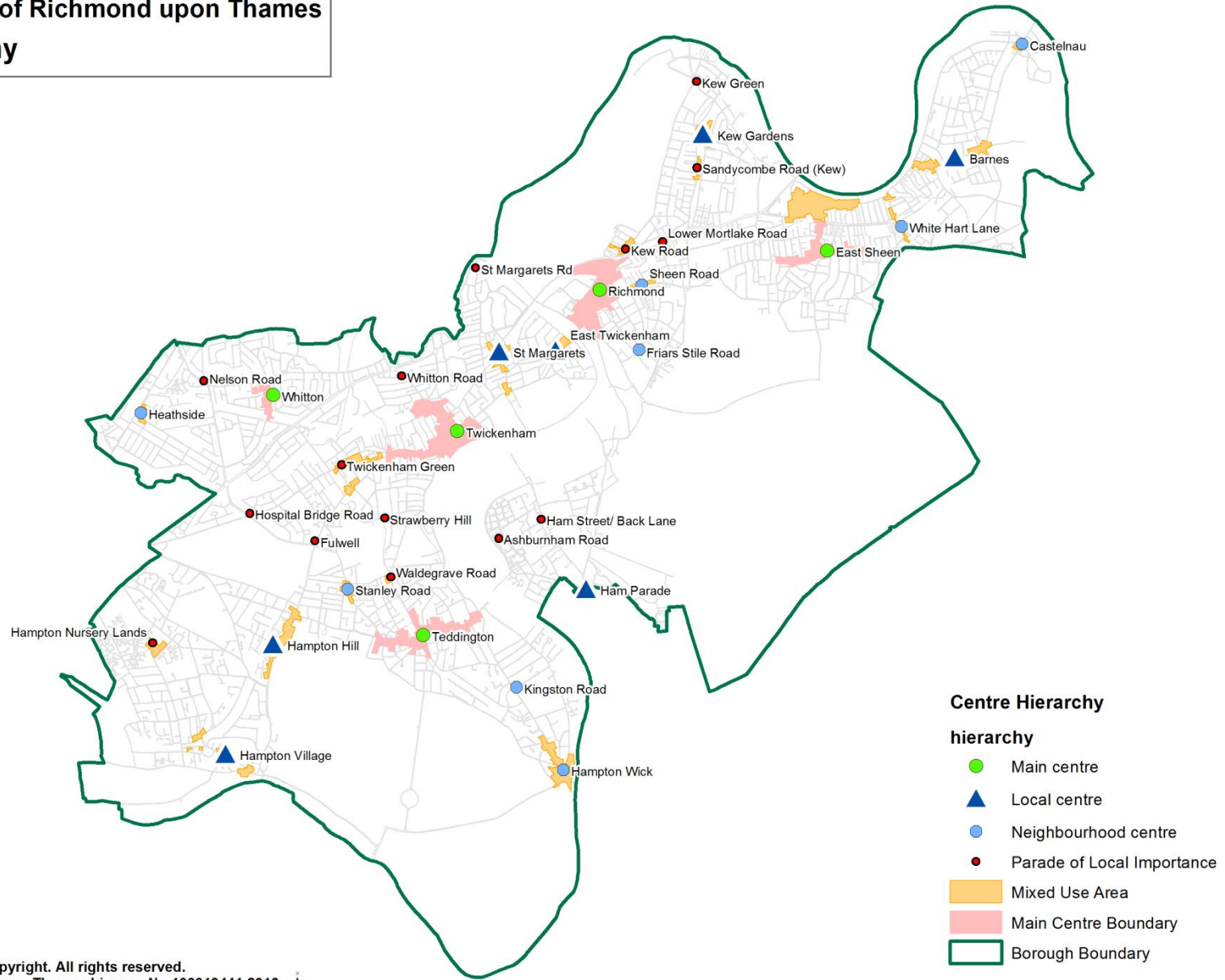
## The Borough's centres

Table 1: Centre hierarchy

Type of centre	Name of centre
<b>Main centres</b>	Richmond Twickenham Teddington East Sheen Whitton
<b>Local centres</b>	Barnes (High Street & Church Road) East Twickenham Hampton Hill Hampton Village Ham Parade (Common) Kew Gardens St Margarets
<b>Neighbourhood centres</b>	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)
<b>Parades of local importance</b>	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

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

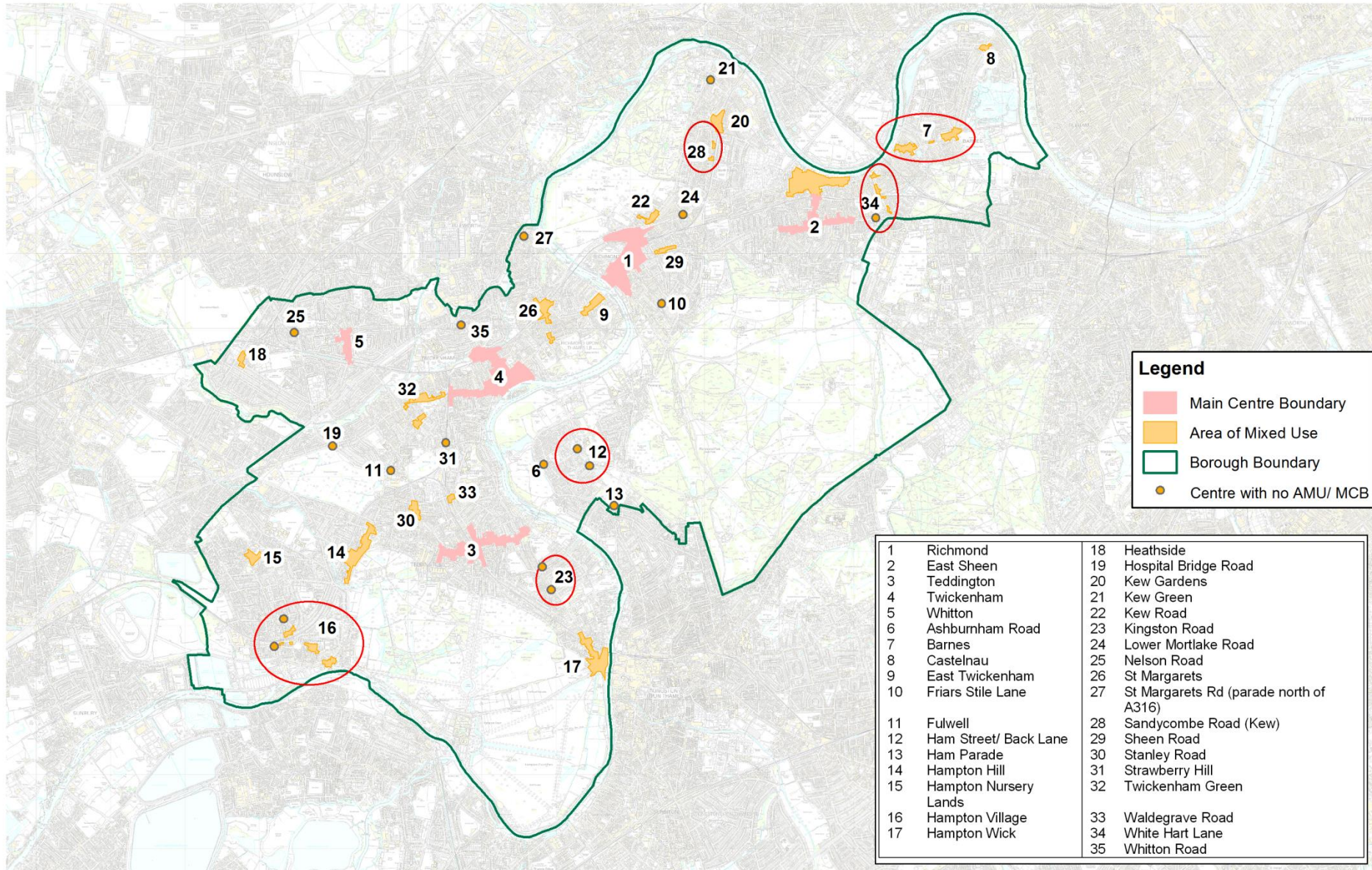
## London Borough of Richmond upon Thames Centre Hierarchy



Local Plan designations  
Produced by Local Plan Team

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## Centres in Richmond upon Thames



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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	2017	2008	2010	2012	2014	2015	2016	2017	2008	2010	2012	2014	2015	2016	2017
<b>Richmond</b>	5.1	4.6	7.8	6	7.7	4.7	<b>4.3</b>	4.9	10.9	10	6.9	5.9	7.1	<b>5.9</b>	5	6.5	8.4	6.3	7.2	5.5	<b>4.8</b>
<b>East Sheen</b>	4.6	4.5	2.6	5.3	2.6	3.9	<b>6.6</b>	11.1	12.7	6.6	6.8	3.8	6	<b>9.0</b>	7.7	8.4	5.2	6.2	3.3	5.3	<b>8.1</b>
<b>Teddington</b>	5.3	7.9	2.6	3.4	3.4	7.7	<b>4.3</b>	4.3	7.8	10	1.7	3.3	6.7	<b>6.7</b>	4.7	7.8	5.1	2.8	3.4	7.3	<b>5.1</b>
<b>Twickenham</b>	4.5	6.8	8.3	9.2	7.6	4.6	<b>6.2</b>	3.9	6.5	10.3	7.9	7	6.1	<b>3.5</b>	4.3	6.7	9.3	8.6	7.3	5.3	<b>4.9</b>
<b>Whitton</b>	8.7	5.8	10.3	7.1	8.8	1.8	<b>7.0</b>	25.6	27	10	6	10.2	4.2	<b>6.1</b>	14.8	13.2	10.2	6.6	9.4	2.9	<b>6.6</b>
<b>Average</b>	<b>5.6</b>	<b>5.5</b>	<b>6.5</b>	<b>6.2</b>	<b>6.4</b>	<b>4.9</b>	<b>5.2</b>	<b>10</b>	<b>11.1</b>	<b>9.2</b>	<b>6.3</b>	<b>5.7</b>	<b>6.2</b>	<b>6.3</b>	<b>7.3</b>	<b>7.9</b>	<b>7.6</b>	<b>6.3</b>	<b>6.1</b>	<b>5.4</b>	<b>5.7</b>

	centre vacancy rate (all frontages)							number of vacant units			
	2008	2010	2012	2014	2015	2016	2017	2014	2015	2016	2017
<b>Richmond</b>	5.4	6.8	8.3	6.5	7.3	5.3	<b>4.7</b>	23	26	19	<b>17</b>
<b>East Sheen</b>	6.2	9.7	6.5	5.9	4.8	6.2	<b>7.6</b>	17	14	18	<b>22</b>
<b>Teddington</b>	4.2	6.8	5.2	2.6	3.6	7.7	<b>7.2</b>	5	7	15	<b>14</b>
<b>Twickenham</b>	7.7	9.3	8.7	9.4	8.4	5.7	<b>5.7</b>	28	25	17	<b>17</b>
<b>Whitton</b>	13.3	11.9	10.4	6.7	9	3.8	<b>5.2</b>	9	12	5	<b>7</b>
<b>Average/total</b>	6.6	8.6	7.7	6.5	6.6	5.8	<b>6.0</b>	82	84	74	<b>77</b>

Source: LBRuT Town Centre Land Use Surveys. Produced by Local Plan Team. Snapshot surveys.  
**Red** indicates an increase in the vacancy rate between 2016 and 2017, **black** no change, and **blue** a fall in the rate.

- 4.1.1 Vacancy rates are a good 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 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 2017 is 6%, a similar figure to 5.8% in 2016 and a drop from 6.6% in 2015. Numbers of vacant units have risen by 3 to 77. Individually, centres have experienced some change, with East Sheen and Whitton experiencing a slight increase in vacancy rates and Richmond and Teddington a slight fall. Twickenham remained at the same vacancy rate as 2016 at 5.7%. East Sheen has experienced an increase in vacancies making it the main centre with the highest percentage vacancy rate and number of vacant outlets.
- 4.1.3 Appendix 1 presents maps showing the location of vacancies in the 5 main centres, which are summarised below:

#### **Richmond**

- Out of the 17 vacancies in Richmond Town Centre, 11 were vacant shops and 3 of these were shops under refurbishment. Vacancies are spread fairly evenly across the centre.
- There were only two vacant shops on the main shopping street, George Street (one of which was subsequently granted permission for change of use), and one vacant shop and two shops under refurbishment on Hill Rise.
- Other vacant shop units were at Paved Court and The Quadrant
- The remaining vacancies consisted of 4 vacant restaurants (A3 use) including 1 under refurbishment and a vacant solicitors and office unit

#### **Whitton**

- There were 7 vacancies within the main centre boundary<sup>5</sup>, 4 of which are shops, including one undergoing refurbishment, and are distributed both East and West of the High Street.

#### **Twickenham**

- There were 17 vacancies in Twickenham Town Centre of which 13 were vacant shops
- 6 shop vacancies were in the core retail areas of King Street, Heath Road and Church Street
- Other vacancies include units being redeveloped at Heath Road and Richmond Road, 2 vacant restaurants (A3 use) and 2 vacant Estate Agents (A2 use)

#### **Teddington**

- Teddington had 14 vacant units with 3 vacant shops and 1 shop under refurbishment. All vacant shop units were located in the Broad Street side of the centre when the survey was undertaken.
- 2 vacant shops were in the key frontage on Broad Street and 1 in the secondary frontage at The Causeway
- Although the 2017 data shows a slight reduction in the number of vacancies in the centre from the previous year, Teddington retains a number of long-term vacancies including Bed City and the former off-licence in the Causeway, both of which are large retail units.
- Other vacant units included 3 vacant Estate Agents (A2 use), 2 vacant restaurants (A3 use) and 2 vacant offices (B1 use)
- 4 other units were under refurbishment or under construction at the time of the survey

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<sup>5</sup> Figures presented in the tables for Whitton includes a small group of shops on Hounslow Road

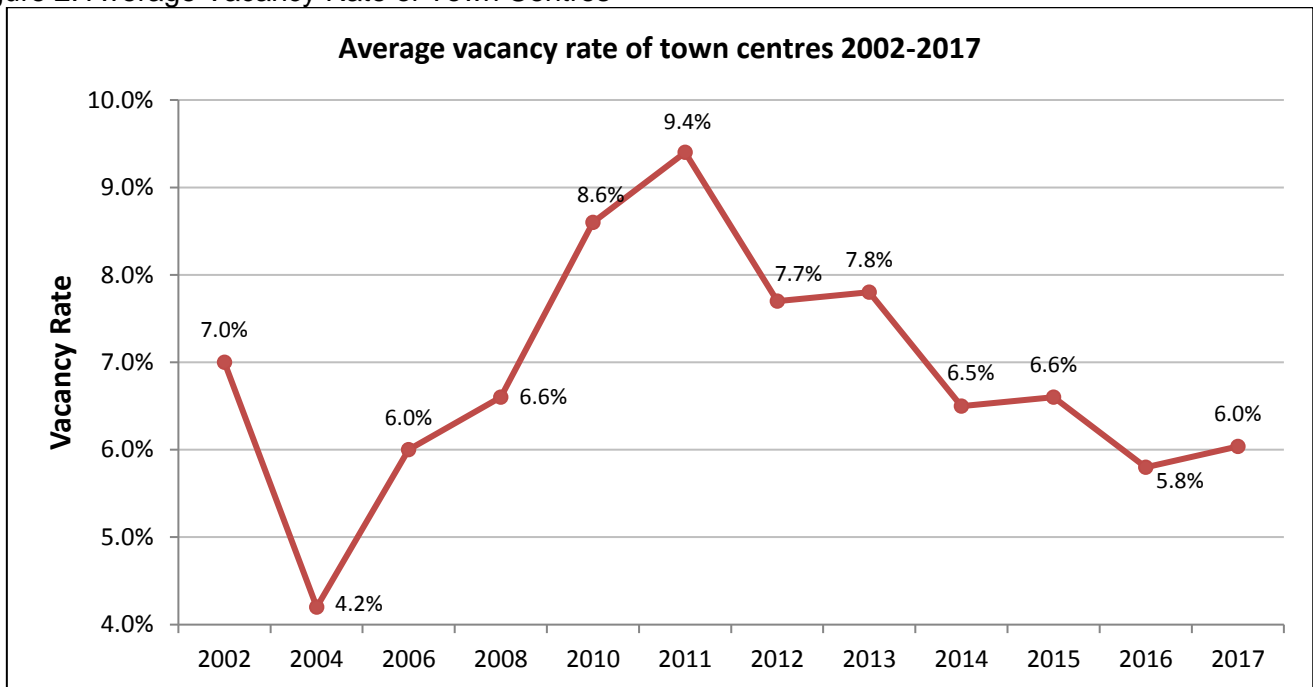
## East Sheen

- East Sheen had 22 vacant units with over half of the units being vacant shops
- The 15 vacant shop units included 5 units in the core frontage, 8 units in the secondary frontage and 2 in the non-designated frontages
- 3 units at Sheen Lane were vacant in advance of refurbishment and redevelopment

4.1.4 **Vacancy rates in the borough's larger centres remain very low compared to the national figure of c11%<sup>6</sup>.** Centre vacancies rates remain at a low level and continue to be significantly below the 2002 – 2017 average of 7.4%.

4.1.5 **Centre vacancy rates are generally lower in designated shopping frontages<sup>7</sup>** and average 5.2% in key shopping frontage, 6.3% in secondary shopping frontage, with the overall figure for designated frontages at 5.7%. Generally, vacancy rates in key shopping frontages are lower than in secondary shopping frontages in the 5 main centres. Planning policies are more restrictive in key shopping frontages, where loss of retail floorspace is resisted.

Figure 2: Average Vacancy Rate of Town Centres



Year	2002	2004	2006	2008	2010	2011	2012	2013	2014	2015	2016	2017
Vacancy Rate	7.7%	5.7%	6.8%	7.1%	9.6%	9.6%	8.1%	7.6%	6.9%	7.7%	5.5%	6.0%

<sup>6</sup> 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.

<sup>7</sup> 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: Vacancy Rates in Local, Neighbourhood Centres and Local Parades (designated frontages)

	key shopping frontage							secondary shopping frontage							all designated frontage						
	2008	2010	2012	2014	2015	2016	2017	2008	2010	2012	2014	2015	2016	2017	2008	2010	2012	2014	2015	2016	2017
<b>Local centres</b>																					
Barnes	11.5	17.7	6.5	3.9	1.3	2.6	8.0	0	3.6	11.1	3.8	3.7	0	11.5	8.5	14	7.7	3.9	2	2	8.9
East Twickenham	5.3	0	5.3	10.5	21.1	11.1	0.0	5.7	13.2	9.4	9.4	17.3	0	5.7	5.6	9.7	8.3	9.7	18.3	2.9	4.2
Hampton Hill	0	4	3.6	3.4	0	0	3.4	4.3	4.3	4.3	6.3	8.5	2.1	4.3	2.8	2.9	4	5.2	5.3	1.3	3.9
Hampton Village	11.5	11.1	7.1	0	3.6	3.7	3.7	5	19	5.6	5.6	5.6	0	0	8.7	9.1	6.5	2.2	4.3	2.2	2.1
Ham Parade	3.3	3.3	0	6.7	6.7	6.7	6.7	0	0	0	0	25	0	0	2.9	2.9	0	5.9	8.8	5.9	5.9
Kew Gardens	4.3	4.2	4	4	8	4.2	0.0	0	6.3	6.3	6.3	6.3	6.3	0	2.6	5	4.9	4.9	7.3	5	0
St Margarets	3.2	0	3.2	3.2	6.5	0	0.0	3.1	6.3	6.3	6.3	3.1	9.4	18.8	3.2	3.2	4.8	4.8	4.8	4.8	9.5
<b>Average</b>		8.5	4.6	4.2	5.1	3.4	4.3		8.5	7	6.6	9.2	2.6	7.1		8.5	5.7	5.3	6.9	3	5.6
<b>Neighbourhood</b>																					
Castelnau	8.7	13	8.7	8.7	13	0	0	-	-	-	-	-	-	-	8.7	13	8.7	8.7	13	0	0
Friars Stile Road*	0	11.8	0	0	17.6	6.3	0	0	50	-	-	-	-	-	0	19	0	0	17.6	6.3	0
Hampton Wick*	9.1	0	0	12.5	12.5	25	12.5	-	-	-	-	-	-	-	9.1	0	0	12.5	12.5	25	12.5
Heathside	0	13.3	13.3	0	0	0	0	7.7	0	0	0	0	7.7	0	3.6	7.1	7.1	0	0	3.6	0
Sheen Road	11.1	11.1	11.1	0	0	11.1	0	0	0	25	0	0	0	0	6.3	6.3	17.6	0	0	6.3	0
Kingston Road	6.7	13.3	6.7	6.7	13.3	6.7	6.7	0	16.7	16.7	0	50	0	16.7	4.8	14.3	9.5	4.8	23.8	5.6	9.5
Stanley Road	4.5	9.5	4.8	0	4.8	0	4.8	7.1	14.3	13.3	13.3	13.3	6.7	6.7	5.6	11.4	8.3	5.6	8.3	2.8	5.6
White Hart Lane	9.5	9.1	4.5	9.1	13.6	4.8	9.5	0	9.5	9.5	4.8	4.8	4.8	9.5	4.8	9.3	7	7	9.3	4.8	9.5
<b>Average</b>		10.5	6.2	4.7	10	4.7	3.9		10.8	11.3	4.8	9.7	5.1	6.3		10.6	7.9	4.7	9.9	4.8	4.7
<b>Local parades</b>																					
Ashburnham Road	0	0	0	0	0	0	0	-	-	-	-	-	-	-	0	0	0	0	0	0	0
Fulwell	22.2	22.2	11.1	0	0	11.1	0	-	-	-	-	-	-	-	22.2	22.2	11.1	0	0	11.1	0
Ham Street / Back Lane	23.1	0	7.7	9.1	23.1	15.4	23.1	0	40	25	0	0	0	0	17.6	11.1	11.8	6.7	17.6	11.8	17.6
Hampton Nursery Lands	0	0	0	0	0	0	0	-	-	-	-	-	-	-	0	0	0	0	0	0	0
Hospital Bridge Road	0	16.7	0	0	0	0	0	-	-	-	-	-	-	-	0	16.7	0	0	0	0	0
Kew Green	11.1	11.1	12.5	12.5	12.5	12.5	25.0	-	-	-	-	-	-	-	11.1	11.1	12.5	12.5	12.5	12.5	25.0
Kew Road	-	-	-	-	-	-	-	7.1	3.6	7.1	3.4	0	3.4	3.4	7.1	3.6	7.1	3.4	0	3.4	3.4
Lower Mortlake Road	9.1	9.1	9.1	0	0	0	0	0	0	0	0	0	0	0	8.3	8.3	8.3	0	0	0	0
Nelson Road	9.1	27.3	27.3	18.2	9.1	18.2	18.2	-	-	-	-	-	-	-	9.1	27.3	27.3	18.2	9.1	18.2	18.2
Sandycombe Road**	16.7	16.7	0	0	0	0	0	0	16.7	0	0	0	0	16.7	8.3	16.7	0	0	0	0	8.3
Strawberry Hill	14.3	14.3	7.1	14.3	0	0	0	-	-	-	-	-	-	-	14.3	14.3	7.1	14.3	0	0	12.5
Twickenham Green	11.8	17.6	27.8	22.2	16.7	11.1	0	-	-	-	-	-	-	-	11.8	17.6	27.8	22.2	16.7	11.1	0
Waldegrave Road	10	10	10	20	10	10	20.0	0	0	0	0	0	0	0	7.1	7.1	7.1	14.3	7.1	7.1	0
St Margarets Road*	-	-	-	-	-	-	-	25	25	25	25	25	12.5	12.5	25	25	25	25	25	12.5	14.3
Whitton Road	16.7	16.7	0	0	0	0	0	-	-	-	-	-	-	-	16.7	22.2	0	0	0	0	0
<b>Average</b>		12.9	11.2	9.8	7.3	7.2	7.3		11.5	9.6	5.8	3.8	3.8	5.8		12.5	10.7	8.6	6.3	6.3	6.9

Red indicates an increase in the rate between 2016 and 2017, black no change, and blue a fall in the rate.

\* St Margarets Road (parade north of the A316) - \*\* Sandycombe Road (Kew)

Table 4. Vacancy Rates in Local, Neighbourhood Centres and Local Parades (all frontages)

	centre vacancy rate (all frontages)								number of vacant units			
	2008	2010	2012	2013	2014	2015	2016	2017	2014	2015	2016	2017
<b>Local centres</b>												
Barnes	2.3	12.3	6.3	4.7	4	2.4	2.4	8.7	5	3	3	11
East Twickenham	6.4	9.1	7.8	6.5	9.1	17.1	2.7	3.9	7	13	2	3
Hampton Hill	4	7.8	7	6.2	10.6	11.4	6.2	12.8	14	15	8	17
Hampton Village	6.3	12.3	5.1	2.6	2.5	5.1	2.5	1.3	2	4	2	1
Ham Parade	2.4	7.3	2.4	2.4	7	7	7	9.3	3	3	3	4
Kew Gardens Station	2	4	3.8	3.9	3.9	5.9	4.1	2.0	2	3	2	1
St Margarets	4.5	3	4.5	6	4.5	4.5	4.4	8.8	3	3	3	6
Average/total			5.7	4.9	6.3	7.7	4	7.5	36	44	23	43
<b>Neighbourhood centres</b>												
Castelnau	8.3	12.5	8.3	12.5	8.3	12.5	0	0	2	3	0	0
Friars Stile Road	0	19	9.5	14.3	5	14.3	5.3	4.8	1	3	1	1
Hampton Wick	15.1	20	23.6	22.2	20.7	29.8	11.1	6.9	12	17	5	4
Heathside	3	6.1	6.1	9.1	0	0	3	0	0	0	1	0
Sheen Road	17.5	7.3	11.9	4.9	4.7	4.9	6.5	4.3	2	2	3	2
Kingston Road	4.2	14.3	9.5	0	4.8	23.8	5.6	9.5	1	5	1	2
Stanley Road	6.5	8.9	6.7	8.9	4.4	6.7	4.4	6.7	2	3	2	3
White Hart Lane	10	10.2	8.5	8.3	8.3	13.3	5.4	8.3	5	8	3	5
Average/total			11.4	10.7	8.2	13.6	5.6	5.5	25	41	16	17
<b>Local parades</b>												
Ashburnham Road	12.5	0	0	0	0	0	0	0	0	0	0	0
Fulwell	16.7	25	16.7	0	0	0	8.3	0	0	0	1	0
Ham Street / Back Lane	25	10.5	11.1	5.6	6.3	16.7	11.1	16.7	1	3	2	3
Hampton Nursery Lands	9.1	0	0	0	0	0	0	0	0	0	0	0
Hospital Bridge Road	0	16.7	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	15.8	1	1	1	3
Kew Road	11.8	5.9	8.8	5.7	2.9	0	2.9	2.9	1	0	1	1
Lower Mortlake Road	10.5	6.3	5.9	0	0	0	0	4.5	0	0	0	1
Nelson Road	9.1	27.3	27.3	27.3	18.2	9.1	18.2	18.2	2	1	2	2
Sandycombe Road**	12.5	19.5	7	4.7	7	4.7	5.1	7.7	3	2	2	3
Strawberry Hill	14.3	14.3	7.1	14.3	14.3	0	0	0	2	0	0	0
Twickenham Green	12.2	12.2	16.7	14.3	23.8	14.3	11.4	4.5	10	6	5	2
Waldegrave Road	13.3	13.3	13.3	13.3	13.3	6.7	6.7	13.3	2	1	1	2
St Margarets Road*	27.3	27.3	27.3	27.3	27.3	18.2	9.1	9.1	3	2	1	1
Whitton Road	15.4	20	6.7	6.7	0	6.7	28.6	26.7	0	1	4	4
Average/total			10.9	8.7	9	6.1	7.1	7.9	25	17	20	22

\* St Margarets Road (parade north of the A316) - \*\* Sandycombe Road (Kew)

4.1.6 Average vacancy rates in local centres, neighbourhood centres and parades of local importance remain lower than the national average and are similar to the London Average Vacancy Rate of 6.1%. Following a fall in vacancy rates between 2015 and 2016, there has been a small rise in the Local Centres and Local Parades, with a slight fall in Neighbourhood Centres. Notable increases in vacancy rates in Secondary Frontages include St Margarets (18.8%) and Kingston Road (16.7%), however due to the small number of units in many of the designated frontages it should be noted that percentages may only reflect a small number of vacant units. For example, Kingston Road only had 1 vacancy out of 6 units in the secondary shopping frontage, and St Margarets had 6 vacancies out of a total of 32 units.

#### Local centres

4.1.7 The vacancy rates in local centres have increased overall since 2016 with increases in Barnes, St. Margarets and Hampton Hill. In designated frontages (Table 4) Barnes and St. Margarets saw large increases in the number of vacant units in secondary shopping frontages. Hampton Hill also saw an increase in vacancies in non-designated frontages and East Twickenham saw an increase in vacancies in secondary shopping frontages. Vacancy rates have however remained below 2015 levels across all designated and non-designated frontages.

4.1.8 A large proportion of the overall increase in the number of vacant units in local centres was due to Hampton Hill and Barnes which had significant increases in vacant units, increasing by 7 and 9 units respectively. These units were mainly situated in the non-designated frontages. In Hampton Hill a notable proportion of these were on sites that were about to undergo redevelopment, including at The Parade and Clarence House on the High Street. Vacant units in Barnes included 2 units under refurbishment; 2 vacant shops on Barnes High Street and 2 vacant shops on Church Road.

#### Neighbourhood centres

4.1.10 The vacancy rate in the smaller Neighbourhood Centres has largely remained at similar levels to 2016 with a small drop from an average of 5.6% to 5.5%. There are lower vacancy rates in Friars Stile Road, Hampton Wick, Heathside and Sheen Road. Castelnau and Heathside had no vacant units. Kingston Road and Stanley Road saw an increase in 1 unit and White Hart Lane saw an increase of 2 units compared to 2016. Long-term rates are encouraging with a general decline in vacancy rates particularly in Hampton Wick and Friars Stile Road.

#### Local parades

4.1.11 Local Parades have seen a slight increase in vacancies, with an increase of 3 units becoming vacant since 2016. This follows the same increase in vacant units between 2016 and 2015. Whitton Road has again seen an increase in vacant units, however this is due to a redevelopment of a parade of cafes and restaurants at 2 - 6 Whitton Road and 111 London Road.

#### Permitted development rights

4.1.12 The impact of changes to permitted development rights<sup>8</sup> 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 The vacancy rates in designated frontages are all lower than the overall centre vacancy rate in all frontages.

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<sup>8</sup> 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.

Table 5: Summary Table: All Vacancies

<b>In designated shopping frontages:<sup>1</sup></b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>Average</b>
<b>total number of vacancies</b>	<b>170</b>	<b>141</b>	<b>127</b>	<b>114</b>	<b>125</b>	<b>91</b>	<b>107</b>	<b>125</b>
main centres	96	82	79	67	65	58	77	75
local centres	33	25	18	23	30	13	24	24
neighbourhood centres	16	15	14	9	19	9	9	13
local parades	25	19	16	15	11	11	12	16
<b>Vacancy rate (%)</b>	<b>9.0</b>	<b>7.5</b>	<b>6.8</b>	<b>6.1</b>	<b>6.7</b>	<b>4.9</b>	<b>5.7</b>	<b>6.7</b>

<b>In all frontages:</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>Average</b>
<b>total number of vacancies</b>	<b>233</b>	<b>195</b>	<b>183</b>	<b>168</b>	<b>186</b>	<b>133</b>	<b>163</b>	<b>180</b>
<b>Vacancy rate (%)</b>	<b>9.6</b>	<b>8.1</b>	<b>7.6</b>	<b>6.9</b>	<b>7.7</b>	<b>5.5</b>	<b>6.6</b>	<b>7.4</b>

<sup>1</sup> 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.

## 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 The number of vacant shops (A1 use) has remained almost exactly the same as 2016 with minor changes in the various centres and parades. The total number of vacancies has increased by 1 unit to 78. The vacancy rate has declined slightly due to a drop in the total number of units recorded as A1 use. There was a decrease of 18 units recorded as A1 use in all designated frontages between 2016 and 2017.

Table 6: Summary Table: Vacant shops in designated frontages

Vacant shops:	2012	2013	2014	2015	2016	2017
main centres	66	64	55	58	44	43
local centres	20	15	16	21	14	15
neighbourhood centres	22	21	14	25	10	9
local parades	18	16	15	9	9	10
<b>total number of vacancies</b>	<b>125</b>	<b>116</b>	<b>100</b>	<b>113</b>	<b>77</b>	<b>78</b>
<b>Shop vacancy rate</b>	<b>9.4%</b>	<b>8.8%</b>	<b>7.7%</b>	<b>8.8%</b>	<b>6.1%</b>	<b>5.9%</b>

- 5.1.3 11 of the 35 centres have experienced a small 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 7: Vacant shops (A1 Use Class – includes A1 services)

	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	2017	2012	2013	2014	2015	2016	2017	2015/16	2016/17	2016	2017
<b>main centres</b>																
Richmond	22	13	14	17	10	10	10.1	6	6.6	8.2	4.8	4.8	-7	0	52.6	58.8
East Sheen	14	16	11	10	13	13	8.4	9.6	6.5	5.9	7.8	7.8	3	0	72.2	59.1
Teddington	4	5	2	4	7	6	3.6	4.5	1.8	3.6	6.7	5.3	3	1	46.7	42.9
Twickenham	16	22	21	18	11	9	10.5	14.5	14.2	12.1	7.2	5.8	-7	2	64.7	52.9
Whitton	10	8	7	9	3	6	13.2	10.5	9.7	12.5	4.1	7.6	-6	-3	60.0	85.7
<b>total/average</b>	<b>66</b>	<b>64</b>	<b>55</b>	<b>58</b>	<b>44</b>	<b>44</b>	<b>9</b>	<b>8.9</b>	<b>7.7</b>	<b>8.2</b>	<b>6.2</b>	<b>6.1</b>	<b>-14</b>	<b>0</b>	<b>59.5</b>	<b>59.4</b>
<b>local centres</b>																
Barnes	7	4	1	1	2	7	10	5.7	1.4	1.4	2.9	11.1	1	-5	66.7	77.8
East Twickenham	4	3	3	7	1	2	8.5	6.4	6.5	17.1	2.3	4.8	-6	-1	50	66.7
Hampton Hill	5	5	7	7	4	2	7.7	7.7	12.3	12.3	6.8	4.8	-3	2	50	66.7
Hampton Village	2	1	1	2	1	1	4.5	2.3	2.3	4.8	2.4	3.8	-1	0	50	100
Ham Parade	0	0	2	1	3	2	0	0	8.7	4.2	14.3	10.5	2	1	100	100
Kew Gardens Station	0	0	0	1	2	0	0	0	0	3.8	8	0	1	2	100	0
St Margarets	2	2	2	2	1	1	5.3	5.3	5.1	5.1	2.6	2.9	-1	0	33.3	16.7
<b>total/average</b>	<b>20</b>	<b>15</b>	<b>16</b>	<b>21</b>	<b>14</b>	<b>15</b>	<b>6.3</b>	<b>4.7</b>	<b>5.3</b>	<b>7</b>	<b>4.7</b>	<b>6.0</b>	<b>-7</b>	<b>-1</b>	<b>60.9</b>	<b>62.5</b>
<b>neighbourhood centre</b>																
Castelnau	1	2	1	2	0	0	9.1	18.2	9.1	20	0	0.0	-2	0	0	0
Friars Stile Road	2	2	1	3	0	0	14.3	14.3	8.3	33.3	0	0.0	-3	0	0	0
Hampton Wick	6	7	5	7	3	1	27.8	38.9	26.3	43.8	20	25.0	-4	2	60	100
Heathside	2	3	0	0	0	0	11.8	17.6	0	0	0	0.0	0	0	0	0
Sheen Road	3	0	0	1	1	0	15.8	0	0	5.3	5.3	0.0	0	1	33.3	0
Kingston Road	2	0	1	4	1	2	13.3	0	7.7	40	9.1	16.7	-3	-1	100	100
Stanley Road	2	3	1	1	2	2	8.7	13	4	4	8.3	9.1	1	0	100	100
White Hart Lane	4	4	5	7	3	4	12.9	12.9	16.7	25	10.7	19.0	-4	-1	100	100
<b>total/average</b>	<b>22</b>	<b>21</b>	<b>14</b>	<b>25</b>	<b>10</b>	<b>9</b>	<b>15</b>	<b>14.4</b>	<b>9.3</b>	<b>18.2</b>	<b>7.3</b>	<b>8.0</b>	<b>-15</b>	<b>1</b>	<b>62.5</b>	<b>100</b>

Table 8: Vacant shops (A1 Use Class – includes A1 services)

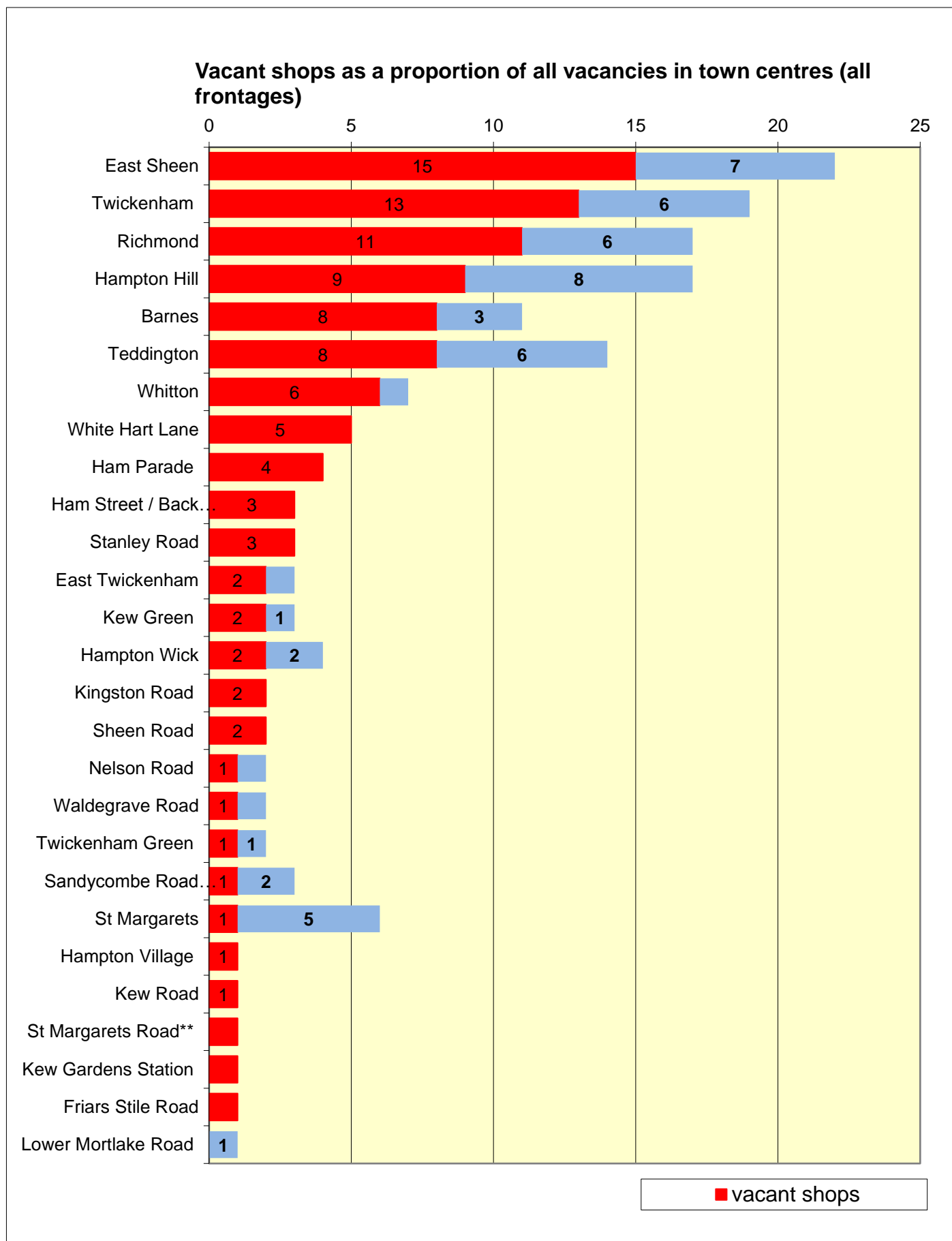
	number of vacant shops						percentage of shops which are vacant						actual change in vacant shops		% of vacancies which are shops	
	2012	2013	2014	2015	2016	2017	2012	2013	2014	2015	2016	2017	2015/16	2016/17	2016	2017
<b>local parades</b>																
Ashburnham Road	0	0	0	0	0	<b>0</b>	0	0	0	0	0	<b>0</b>	0	0	0	0
Fulwell	1	0	0	0	0	<b>0</b>	16.7	0	0	0	0	<b>0</b>	0	0	0	0
Ham Street / Back Lane	2	1	1	2	2	<b>3</b>	22.2	11.1	12.5	25	22.2	<b>42.9</b>	0	1	100	100
Hampton Nursery Lands	0	0	0	0	0	<b>0</b>	0	0	0	0	0	<b>0</b>	0	0	0	0
Hospital Bridge Road	0	0	0	0	0	<b>0</b>	0	0	0	0	0	<b>0</b>	0	0	0	0
Kew Green	2	2	1	1	1	<b>2</b>	18.2	18.2	11.1	11.1	11.1	<b>33.3</b>	0	1	100	100
Kew Road	1	1	0	0	1	<b>1</b>	6.3	6.3	0	0	7.7	<b>7.7</b>	1	0	100	100
Lower Mortlake Road	1	0	0	0	0	<b>0</b>	10	0	0	0	0	<b>0</b>	0	0	0	0
Nelson Road	2	2	1	1	1	<b>1</b>	33.3	33.3	14.3	14.3	14.3	<b>14.3</b>	0	0	50	50
Sandycombe Road	1	1	1	0	0	<b>1</b>	5.9	5.9	6.3	0	0	<b>11.1</b>	0	1	0	100
Strawberry Hill	1	2	2	0	0	<b>0</b>	14.3	28.6	28.6	0	0	<b>0</b>	0	0	0	0
Twickenham Green	4	3	4	3	2	<b>0</b>	22.2	16.7	25	16.7	11.8	<b>0</b>	-1	-2	40	0
Waldegrave Road	0	1	2	1	1	<b>1</b>	0	11.1	25	14.3	14.3	<b>14.3</b>	0	0	100	50
St Margaret's Road*	3	3	3	1	1	<b>1</b>	75	75	75	20	20	<b>20</b>	0	0	100	100
Whitton Road	0	0	0	0	0	<b>0</b>	0	0	0	0	0	<b>0</b>	0	0	0	100
<b>total/average</b>	18	16	15	9	9	<b>10</b>	13.6	12	11.7	6.9	7	<b>9.5</b>	0	-1	45	83

Notes:

**Red** indicates an increase in the rate between 2016 and 2017, black no change, and **blue** a fall in the rate.

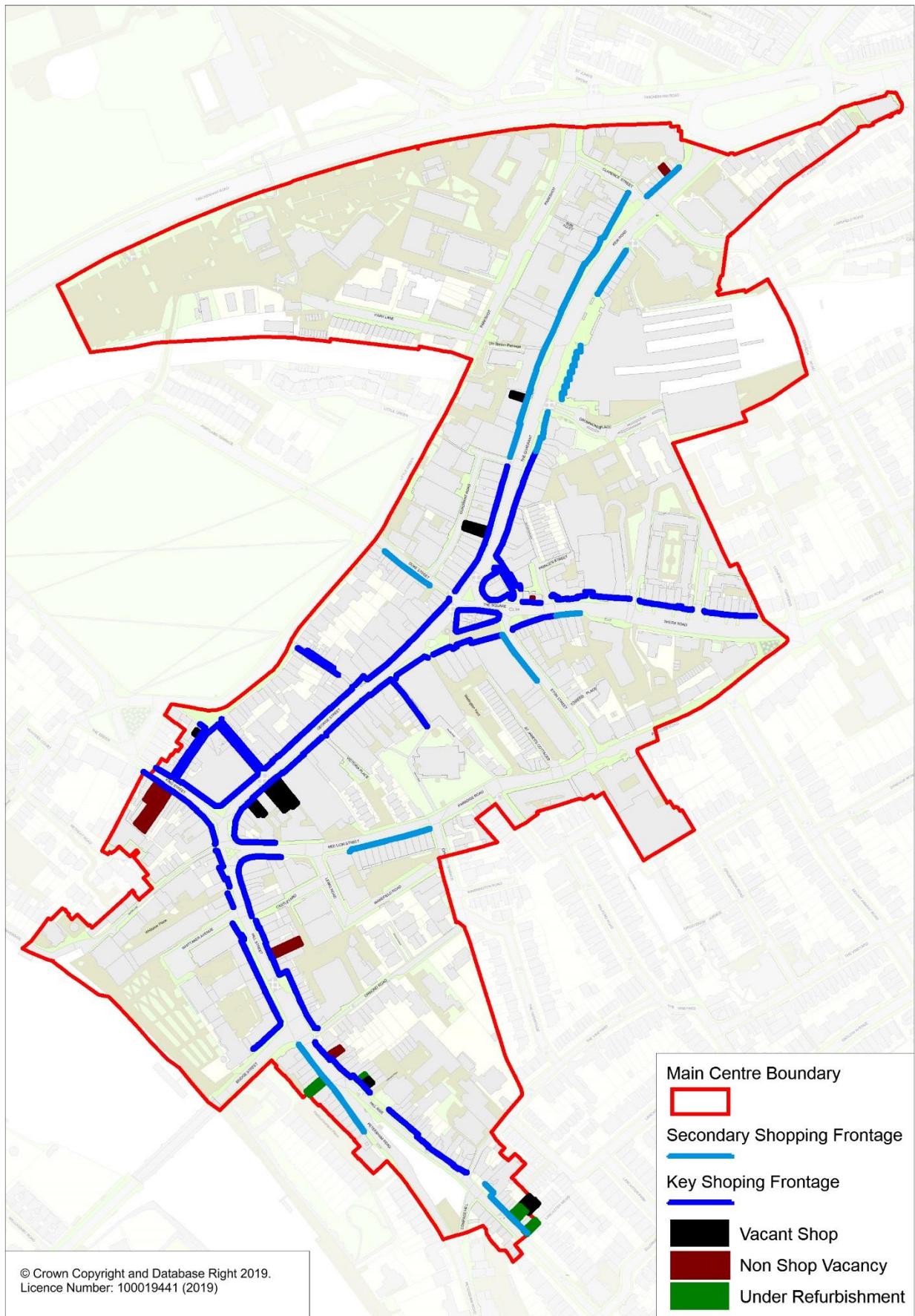
\*\*St Margarets Road (parade north of the A316)

Figure 2: Vacant shops as a proportion of all vacancies in town centres (designated frontages)

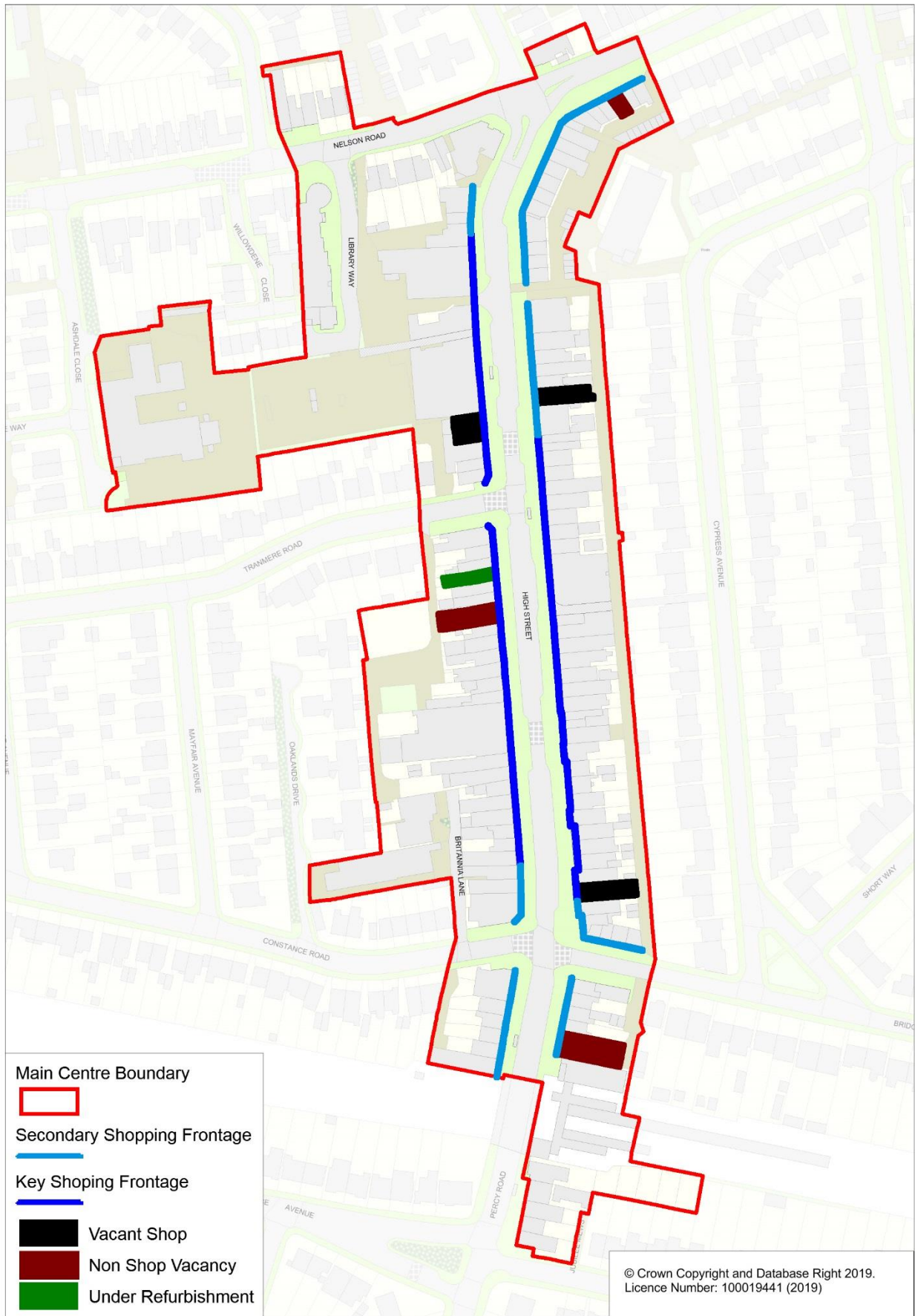


# Appendix 1: Maps of vacant units in the five main centres

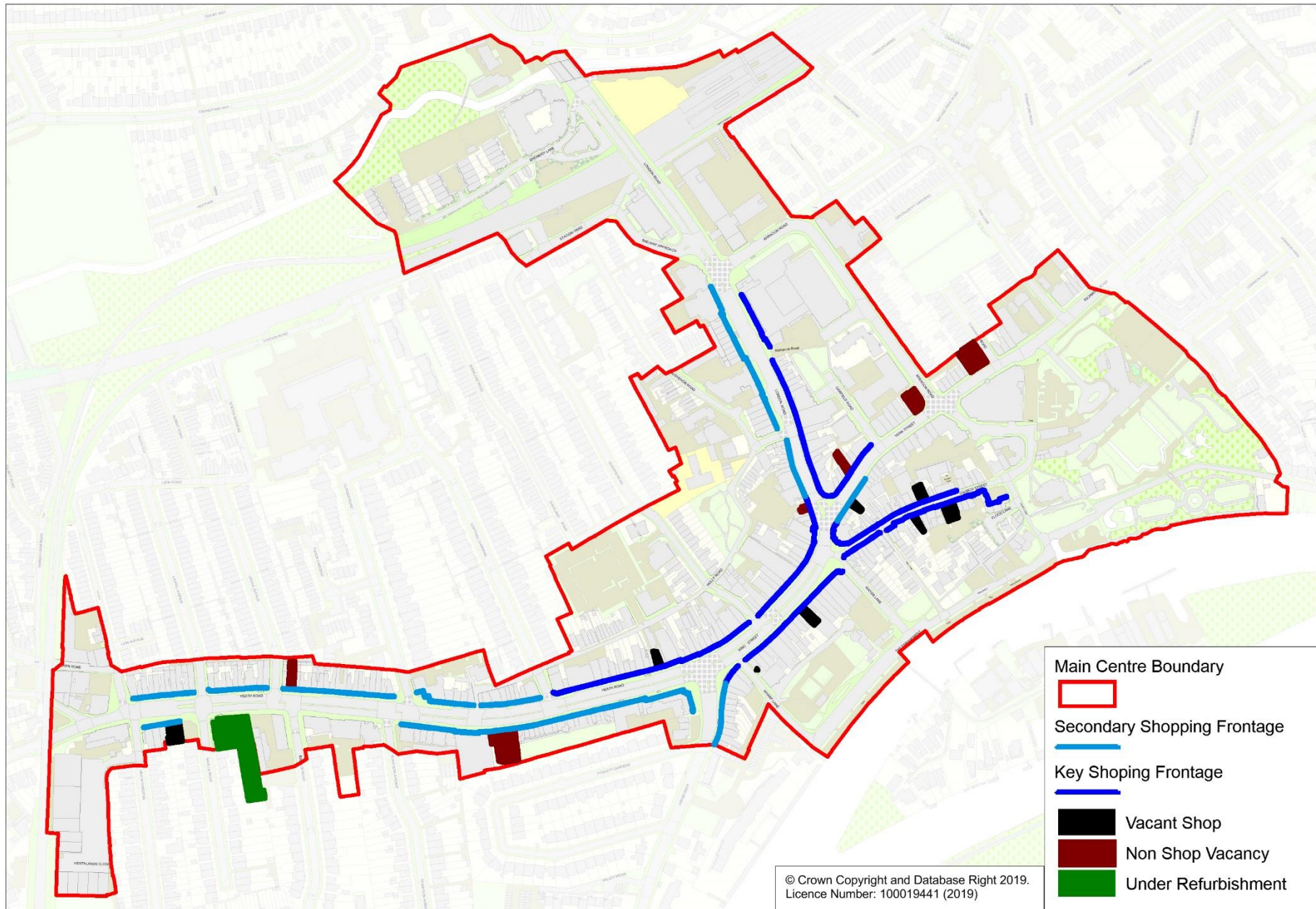
## Vacant Units in Richmond



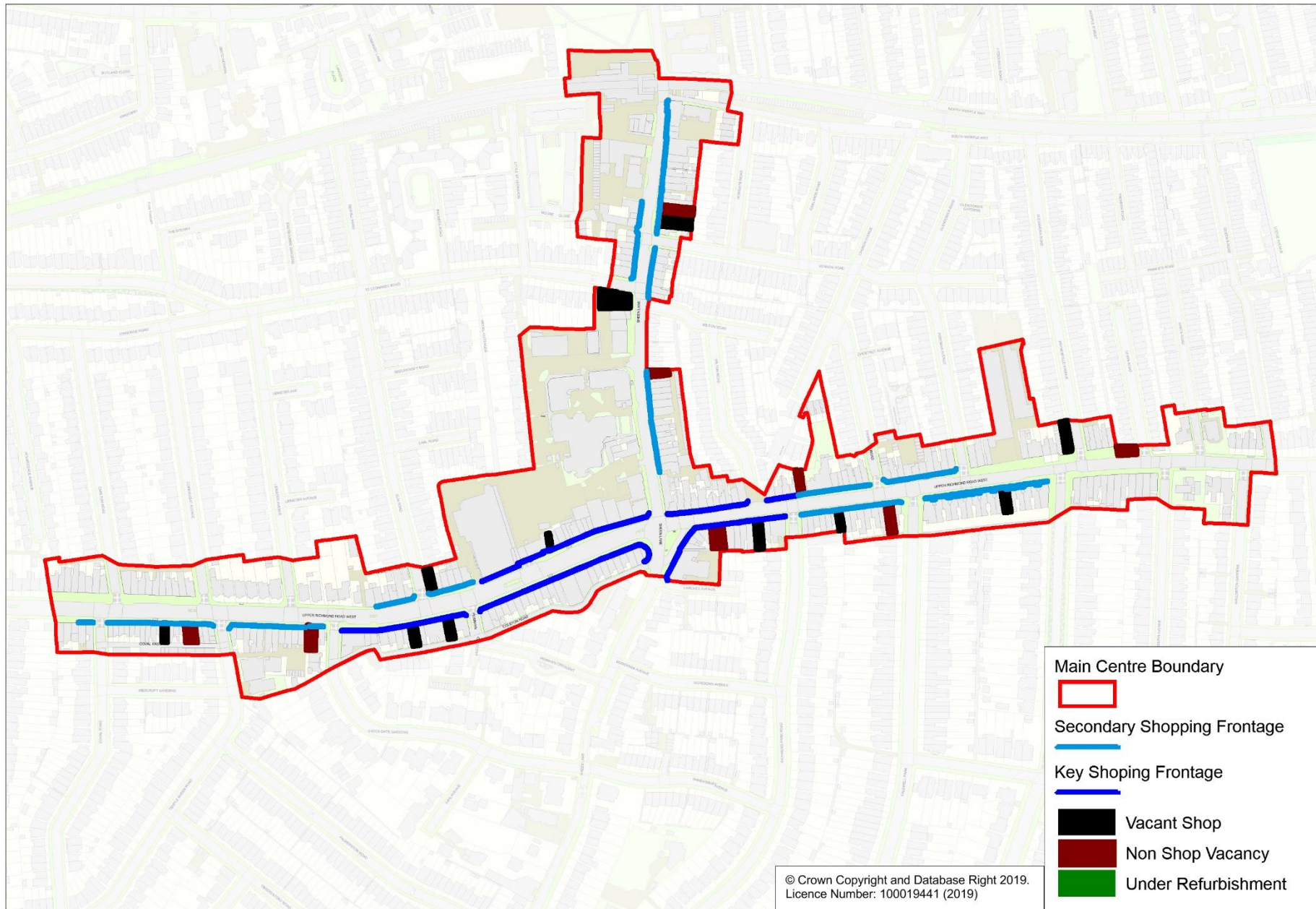
# Vacant Units in Whitton



# Vacant Units in Twickenham



# Vacant Units in East Sheen



# Vacant Units in Teddington

