

# 2019 Centre Land Use Survey

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Planning

*9 December 2019*

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**Local Plan Monitoring Report**

## **2019 Centre Land Use Survey**

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## 1. Summary

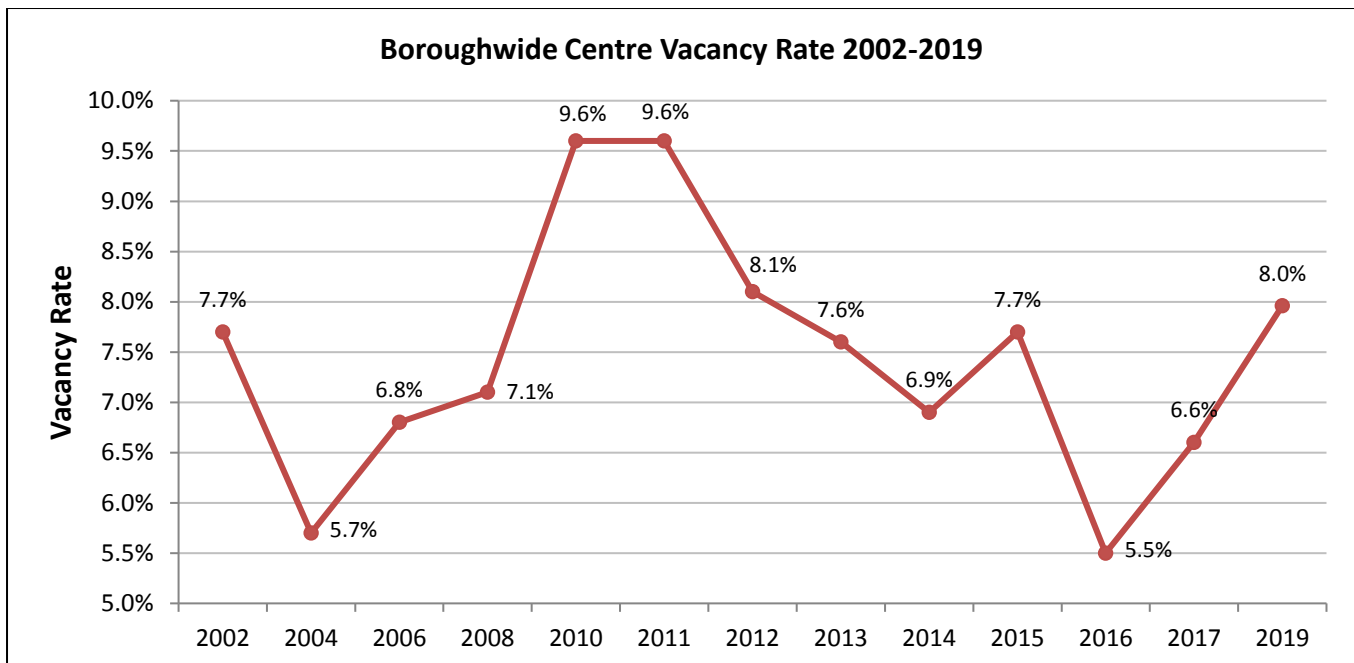
The Council surveys the ground floor occupiers in centres across the borough each year to be able to systematically monitor changes in vacancy rates and types of use. It is a snapshot survey of approximately 2,500 properties. The key findings are as follows:

### Centre vacancy rates

The number of vacant units as a proportion of the total units in the centre.

- The overall number of vacant units has risen from the previous survey in 2017. In total there were 197 vacant units borough-wide in 2019, compared to 163 in 2017, 133 in 2016 and 186 in 2015.
- At 8% the borough centre vacancy rate continues to be low and remains well below the national average of around 11.1%.
- 7.2% of units in designated frontages were vacant in 2019, compared to 5.7% in 2017 and 5.4% of units in 2016. Vacancy rates in designated shopping frontages are lower than in non-designated frontages. (Table 2)

Figure 1: Boroughwide Centre Vacancy Rate



Year	2002	2004	2006	2008	2010	2011	2012	2013	2014	2015	2016	2017	2019
Vacancy Rate	7.7%	5.7%	6.8%	7.1%	9.6%	9.6%	8.1%	7.6%	6.9%	7.7%	5.5%	6.6%	8.0%

### 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 83 vacant shops in designated frontages recorded by the survey in 2019 in centres across the borough. This is slightly higher than the 78 vacant shops recorded in 2017, 77 in 2016, but still well below the 113 vacant shops recorded in 2015. (Table 6)
- The 2019 shop vacancy rate of 7.4% is above the 2017 rate of 5.9% and the 2016 rate of 6.1% but is below the rate in 2015 when 8.8% of shops were vacant.
- Vacancies in the main town centres have fallen very slightly and across all main centres the numbers of vacant shops are similar to the 2017 figures. The number of vacant shops in the local parade designated frontages have increased from 10 in 2017 to 16 in 2019.

## 2. Methodology

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>.

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.

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.

The survey includes all businesses in designated shopping frontages in the borough. 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.

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.

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<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)

### 3. Background

#### 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, and the borough specifically, still require additional retail floorspace. However, updated research will be commissioned as part of the evidence base informing the Local Plan review. It is therefore important and timely to monitor vacancy rates.

#### Changes to permitted development rights:

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.

#### **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.
	<b>Some exemptions but no prior approval process.</b>
	change from B1 office to residential. Initially this change was temporary until 30th May 2016 but was subsequently made permanent in April 2016 <sup>2</sup> .
Came into force in April 2014	<b>Some exemptions and limited prior approval process.</b>
	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).
	<b>Some exemptions and prior approval process.</b>
Came into force 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.
	<b>No prior approval process and few exemptions.</b>
	change of use from shops (A1) to financial and professional services (A2).
Came into force in April 2017	<b>There is no prior approval process and no exemptions.</b>
	changes to permitted development rights to allow change of use from shops (A1 Use Class) to financial services (A2 Use Class). The Council has made an Article 4 Direction to restrict this change in various centres across the borough.
Came into force in May 2019	changes to permitted development rights to allow change of use from A1 (shops), A2 (financial services, A5 takeaways, betting shops, pay day loan shops and launderettes to an office (B1(a))
	<b>Some exemptions and prior approval process.</b>

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

<sup>2</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.

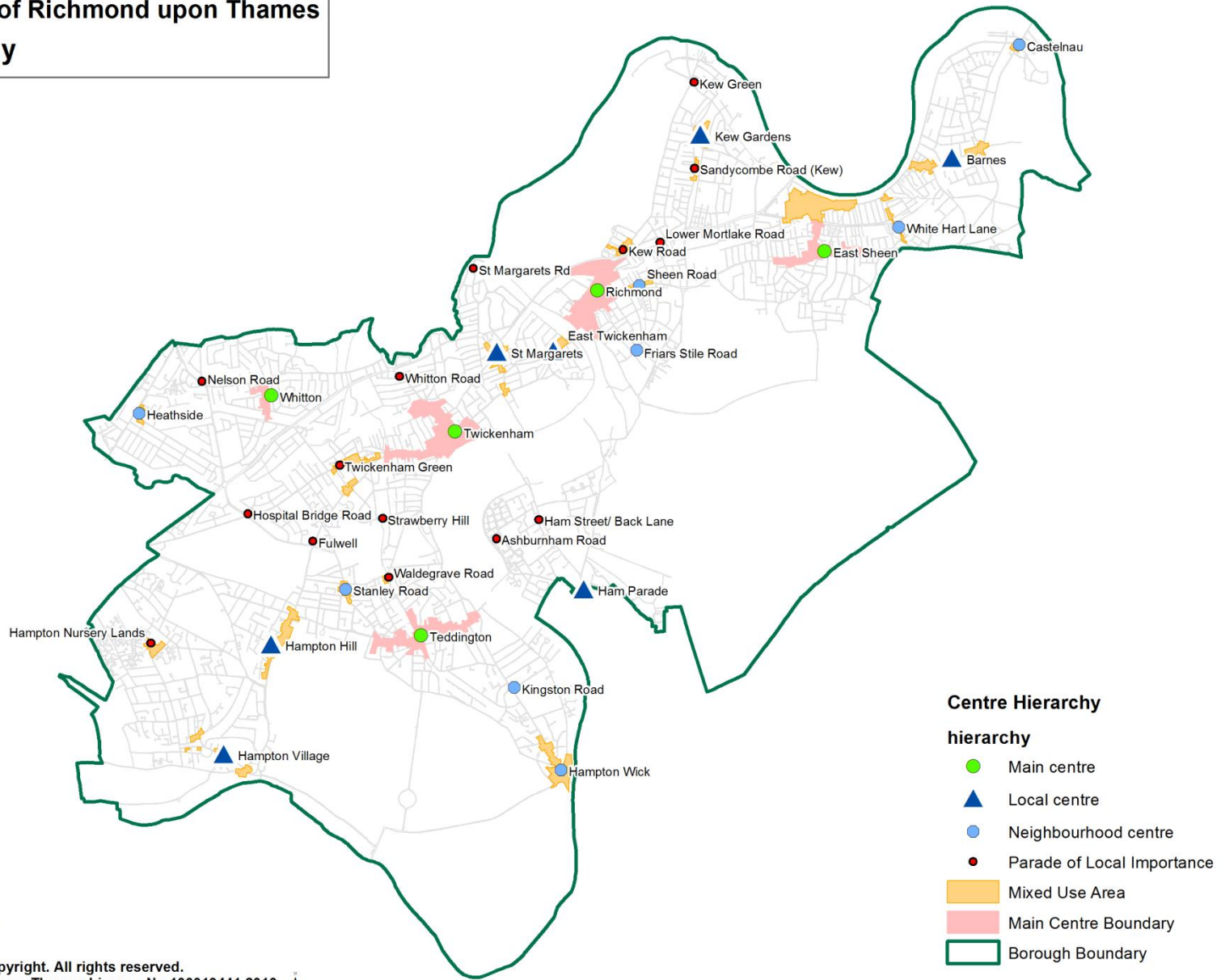
## The Borough's centres

Table 1: Centre hierarchy

Type of centre	Name of centre
<b>Main town 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 Local Plan policy LP25.

## London Borough of Richmond upon Thames Centre Hierarchy

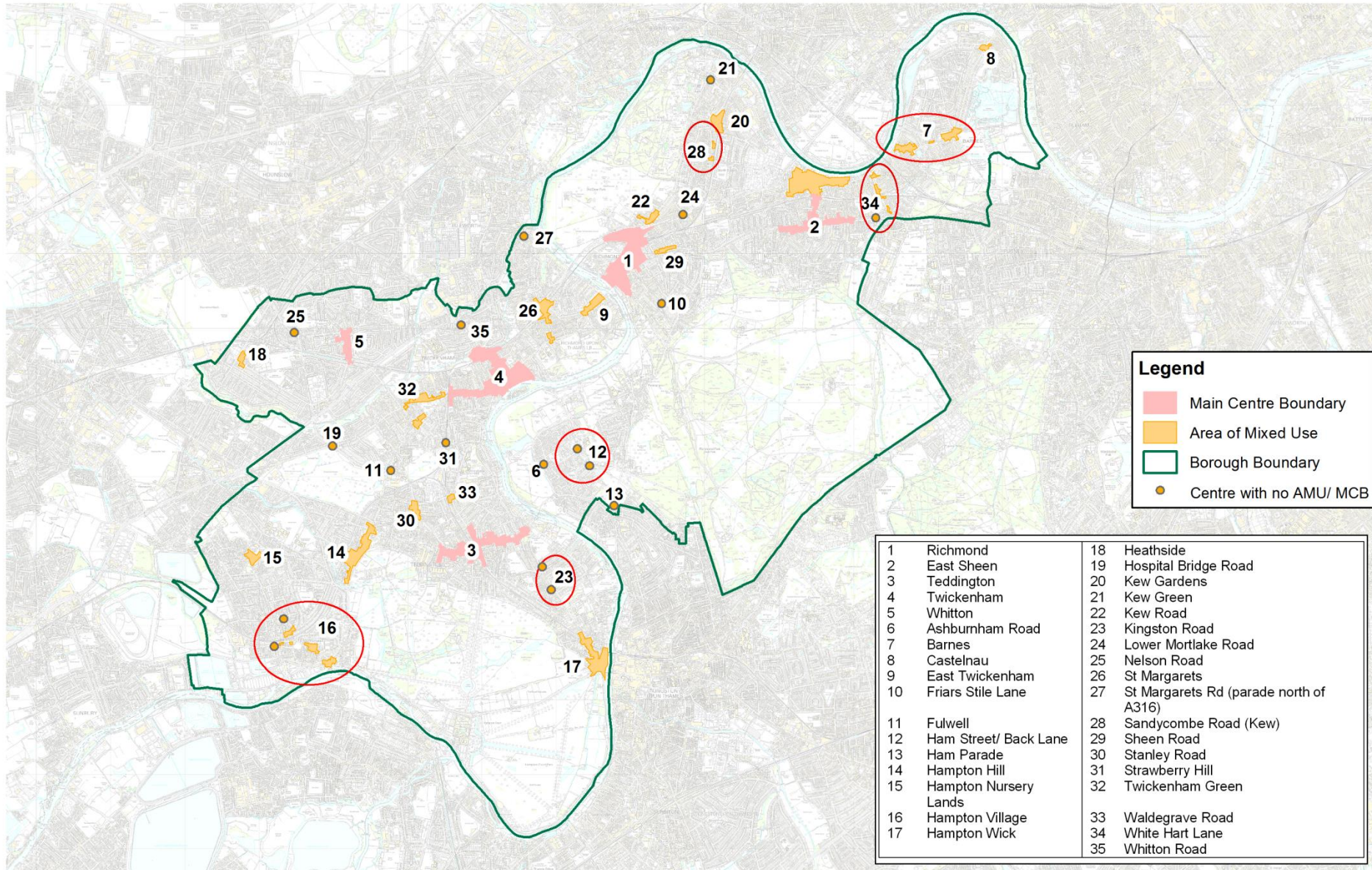


Local Plan designations  
Produced by Local Plan Team

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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						
	2010	2012	2014	2015	2016	2017	2019	2010	2012	2014	2015	2016	2017	2019	2010	2012	2014	2015	2016	2017	2019
<b>Richmond</b>	4.6	7.8	6	7.7	4.7	4.3	<b>4.8</b>	10.9	10	6.9	5.9	7.1	5.9	<b>9.8</b>	6.5	8.4	6.3	7.2	5.5	4.8	<b>6.3</b>
<b>East Sheen</b>	4.5	2.6	5.3	2.6	3.9	6.6	<b>14.7</b>	12.7	6.6	6.8	3.8	6	9.0	<b>5.2</b>	8.4	5.2	6.2	3.3	5.3	8.1	<b>8.6</b>
<b>Teddington</b>	7.9	2.6	3.4	3.4	7.7	4.3	<b>6.0</b>	7.8	10	1.7	3.3	6.7	6.7	<b>3.4</b>	7.8	5.1	2.8	3.4	7.3	5.1	<b>5.1</b>
<b>Twickenham</b>	6.8	8.3	9.2	7.6	4.6	6.2	<b>8.5</b>	6.5	10.3	7.9	7.0	6.1	3.5	<b>7.8</b>	6.7	9.3	8.6	7.3	5.3	4.9	<b>8.2</b>
<b>Whitton</b>	5.8	10.3	7.1	8.8	1.8	7.0	<b>8.6</b>	27	10	6	10.2	4.2	6.1	<b>6.0</b>	13.2	10.2	6.6	9.4	2.9	6.6	<b>7.4</b>
<b>Average</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>7.4</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>6.7</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>	<b>7.1</b>

	centre vacancy rate (all frontages)							number of vacant units				
	2010	2012	2014	2015	2016	2017	2019	2014	2015	2016	2017	2019
<b>Richmond</b>	6.8	8.3	6.5	7.3	5.3	4.7	<b>6.7</b>	23	26	19	17	<b>24</b>
<b>East Sheen</b>	9.7	6.5	5.9	4.8	6.2	7.6	<b>9.3</b>	17	14	18	22	<b>27</b>
<b>Teddington</b>	6.8	5.2	2.6	3.6	7.7	7.2	<b>4.6</b>	5	7	15	14	<b>9</b>
<b>Twickenham</b>	9.3	8.7	9.4	8.4	5.7	5.7	<b>9.1</b>	28	25	17	17	<b>27</b>
<b>Whitton</b>	11.9	10.4	6.7	9.0	3.8	5.2	<b>6.6</b>	9	12	5	7	<b>9</b>
<b>Average/total</b>	<b>8.6</b>	<b>7.7</b>	<b>6.5</b>	<b>6.6</b>	<b>5.8</b>	<b>6.0</b>	<b>7.5</b>	<b>82</b>	<b>84</b>	<b>74</b>	<b>77</b>	<b>96</b>

Source: LBRuT Town Centre Land Use Surveys. Produced by Local Plan Team. Snapshot surveys.  
**Red** indicates an increase in the vacancy rate between 2017 and 2019, **black** no change, and **blue** a fall in the rate.



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 when the survey is undertaken, a unit may have been vacant for 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.

The overall vacancy rate for the borough's five main town centres in 2019 is 7.6%, higher than the 6% recorded in 2017, 5.8 in 2016 and 6.6 in 2015. Numbers of vacant units have risen by 20 to 97. Individually, centres have experienced some change, with East Sheen and Twickenham experiencing an increase in vacancy rates and Teddington a slight fall. East Sheen and Twickenham have the highest percentage vacancy rates and number of vacant outlets of the main town centres.

Appendix 1 presents maps showing the vacancies in the 5 main town centres, which are summarised below:

### **Richmond**

- Out of the 24 vacancies in Richmond town centre, 13 were vacant shops and 2 of were shops under refurbishment. Vacancies are spread fairly evenly across the centre.
- There were seven vacant shops on Hill Street and Hill Rise with 4 units in key frontages and 3 in secondary frontages. The main shopping street, George Street had 2 vacant shop units.
- Other vacant shop units included 1 unit on Eton Street and 2 units on Sheen Road
- The remaining vacancies consisted of 2 vacant restaurants (A3 use) and a bar (A4 use) on Hill Rise and Kew Road. A hot food takeaway (A5 use) was vacant on Kew Road, and 2 estate agents (A2 use) were vacant on Sheen Road and the Quadrant. Other vacancies consisted of an office unit on King Street (B1), a former Yoga Studio (D1) on Church Court and a former tattoo studio (SG) on Richmond Hill.
- Apart from 1 unit on Hill Rise, all vacant shops had become newly vacant in 2019, and all vacant shops in 2017 were occupied at the time of the 2019 survey.

### **Twickenham**

- There were 27 vacancies in Twickenham town centre of which 13 were vacant shops. 11 of these vacant shops had become newly vacant in 2019, with all but 2 vacant shops in 2017 now occupied.
- 4 vacant shops were on Church Street including a former hairdresser and an off-licence
- 3 vacant shops were vacant on Heath Road including the large former tile shop
- 4 vacant shops on King Street included a former travel agent and a mobile phone shop
- Other vacancies include a former estate agent and a bank (A2) on Heath Road and London Road
- There were 5 vacant café / restaurant units (A3) on York Street, Church Street and Heath Road, including 2 units which were under refurbishment at the time of the survey
- The remaining vacant shop units comprised a former betting shop, and 2 redevelopment sites under construction at Heath Road and Richmond Road.

### **Teddington**

- Teddington had 9 vacant units with 3 vacant shops.
- Two vacant shop units were located in the Broad Street / The Causeway area of the centre and 1 unit on the High Street.
- Other vacant units included 3 former banks and 2 former estate agents (A2 use), 2 vacant restaurants (A3 use) and 1 vacant office unit (B1 use)

### **East Sheen**

- East Sheen had 27 vacant units with only 8 of the units being vacant shops
- The 8 vacant shop units were all located on Upper Richmond Road West, which is the main thoroughfare in this linear centre, and included 6 units in the key frontage, 1 unit in the secondary frontage and 1 in the non-designated frontage
- Other vacant units included 2 former Banks and 2 former Estate Agents (A2 use) and 3 units on Upper Richmond Road West which have planning permission for redevelopment.

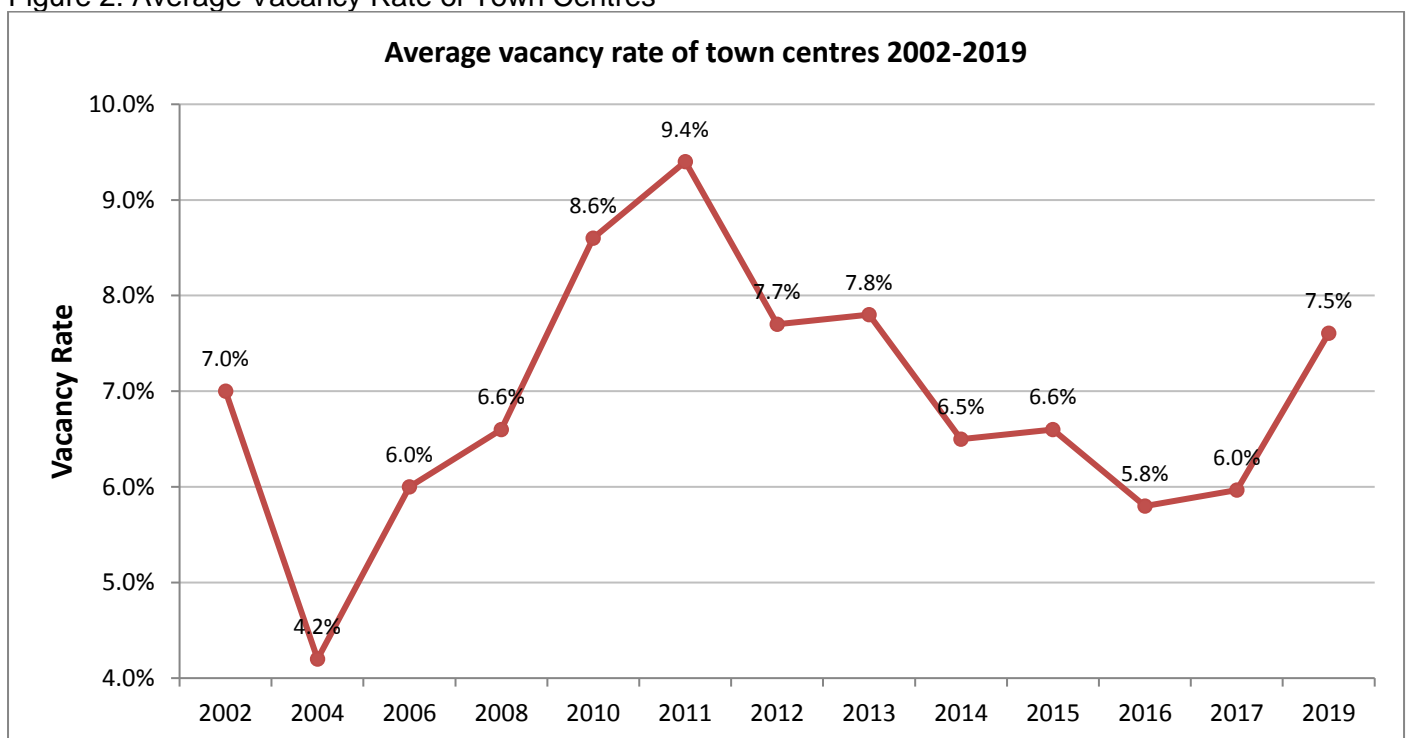
## Whitton

- There were 9 vacancies within the main centre boundary<sup>3</sup> of Whitton. 4 vacant shop units were located to the south of the High Street and 1 on Hounslow Road. 1 estate agent (A2 use) was vacant on the High Street and a former bank unit (A2) remained vacant adjacent to the train station. A former betting shop also became vacant at the north end of the High Street.

### 5. Average Vacancy Rate of Town Centres

Vacancy rates in the borough's larger centres remain low compared to the national figure of around 11%. Centre vacancy rates have increased slightly in designated shopping frontages and average 7.4% in key shopping frontage, 7% in secondary shopping frontage, with the overall figure for designated frontages at 7.2. (Table 2)

Figure 2: Average Vacancy Rate of Town Centres



Year	2002	2004	2006	2008	2010	2011	2012	2013	2014	2015	2016	2017	2019
Vacancy Rate	7.0%	4.2%	6.0%	6.6%	8.6%	9.4%	7.7%	7.8%	6.5%	6.6%	5.8%	6.0%	7.5%

<sup>3</sup> Figures presented in the tables for Whitton includes a small group of shops on Hounslow Road

Table 3: Vacancy Rates in Local Centres, Neighbourhood Centres and Local Parades (designated frontages)

	key shopping frontage							secondary shopping frontage							all designated frontage						
	2010	2012	2014	2015	2016	2017	2019	2010	2012	2014	2015	2016	2017	2019	2010	2012	2014	2015	2016	2017	2019
<b>Local centres</b>																					
Barnes	17.7	6.5	3.9	1.3	2.6	8.0	5.3	3.6	11.1	3.8	3.7	0	11.5	3.8	14	7.7	3.9	2	2	8.9	4.9
East Twickenham	0	5.3	10.5	21.1	11.1	0	0	13.2	9.4	9.4	17.3	0	5.7	5.7	9.7	8.3	9.7	18.3	2.9	4.2	4.3
Hampton Hill	4	3.6	3.4	0	0	3.4	17.2	4.3	4.3	6.3	8.5	2.1	4.3	6.5	2.9	4	5.2	5.3	1.3	3.9	10.7
Hampton Village	11.1	7.1	0	3.6	3.7	3.7	7.1	19	5.6	5.6	5.6	0	0	5	9.1	6.5	2.2	4.3	2.2	2.1	6.3
Ham Parade	3.3	0	6.7	6.7	6.7	6.7	0	0	0	0	25	0	0	0	2.9	0	5.9	8.8	5.9	5.9	0
Kew Gardens	4.2	4	4	8	4.2	0	0	6.3	6.3	6.3	6.3	6.3	0	6	5	4.9	4.9	7.3	5	0	3
St Margarets	0	3.2	3.2	6.5	0	0	3.2	6.3	6.3	6.3	3.1	9.4	18.8	12.1	3.2	4.8	4.8	4.8	4.8	9.5	7.8
<b>Average</b>	8.5	4.6	4.2	5.1	3.4	4.3	5.1	8.5	7	6.6	9.2	2.6	7.1	6.6	8.5	5.7	5.3	6.9	3	5.6	5.8
<b>Neighbourhood</b>																					
Castelnau	13	8.7	8.7	13	0	0	9	-	-	-	-	-	-	-	13	8.7	8.7	13	0	0	9
Friars Stile Road*	11.8	0	0	17.6	6.3	0	6	50	-	-	-	-	-	-	19	0	0	17.6	6.3	0	6
Hampton Wick*	0	0	12.5	12.5	25	12.5	0	-	-	-	-	-	-	-	0	0	12.5	12.5	25	12.5	0
Heathside	13.3	13.3	0	0	0	0	20	0	0	0	0	7.7	0	8	7.1	7.1	0	0	3.6	0	14
Sheen Road	11.1	11.1	0	0	11.1	0	11	0	25	0	0	0	0	0	6.3	17.6	0	0	6.3	0	6
Kingston Road	13.3	6.7	6.7	13.3	6.7	6.7	6.7	16.7	16.7	0	50	0	16.7	0	14.3	9.5	4.8	23.8	5.6	9.5	4.8
Stanley Road	9.5	4.8	0	4.8	0	4.8	0	14.3	13.3	13.3	13.3	6.7	6.7	12.5	11.4	8.3	5.6	8.3	2.8	5.6	5.4
White Hart Lane	9.1	4.5	9.1	13.6	4.8	9.5	13	9.5	9.5	4.8	4.8	4.8	9.5	4.8	9.3	7	7	9.3	4.8	9.5	9.1
<b>Average</b>	10.5	6.2	4.7	10	4.7	3.9	8.4	10.8	11.3	4.8	9.7	5.1	6.3	6.3	10.6	7.9	4.7	9.9	4.8	4.7	7.7
<b>Local parades</b>																					
Ashburnham Road	0	0	0	0	0	0	13	-	-	-	-	-	-	-	0	0	0	0	0	0	13
Fulwell	22.2	11.1	0	0	11.1	0	22	-	-	-	-	-	-	-	22.2	11.1	0	0	11.1	0	22
Ham Street / Back Lane	0	7.7	9.1	23.1	15.4	23.1	30.8	40	25	0	0	0	0	0	11.1	11.8	6.7	17.6	11.8	17.6	23.5
Hampton Nursery Lands	0	0	0	0	0	0	25	-	-	-	-	-	-	-	0	0	0	0	0	0	25
Hospital Bridge Road	16.7	0	0	0	0	0	0	-	-	-	-	-	-	-	16.7	0	0	0	0	0	0
Kew Green	11.1	12.5	12.5	12.5	12.5	25	0	0	0	0	0	0	0	0	11.1	12.5	12.5	12.5	12.5	25.0	0
Kew Road	-	-	-	-	-	-	-	3.6	7.1	3.4	0	3.4	3.4	10.3	3.6	7.1	3.4	0	3.4	3.4	10.3
Lower Mortlake Road	9.1	9.1	0	0	0	0	0	0	0	0	0	0	0	0	8.3	8.3	0	0	0	0	0
Nelson Road	27.3	27.3	18.2	9.1	18.2	18.2	27.3	-	-	-	-	-	-	-	27.3	27.3	18.2	9.1	18.2	18.2	27.3
Sandycombe Road**	16.7	0	0	0	0	0	17	16.7	0	0	0	0	16.7	0	16.7	0	0	0	0	8.3	16.7
Strawberry Hill	14.3	7.1	14.3	0	0	0	0	-	-	-	-	-	-	-	14.3	7.1	14.3	0	0	12.5	25
Twickenham Green	17.6	27.8	22.2	16.7	11.1	0	6	-	-	-	-	-	-	-	17.6	27.8	22.2	16.7	11.1	0	0
Waldegrave Road	10	10	20	10	10	20	20	0	0	0	0	0	0	0	7.1	7.1	14.3	7.1	7.1	0	6
St Margarets Road*	-	-	-	-	-	-	-	25	25	25	25	12.5	12.5	25	25	25	25	25	12.5	14.3	14.3
Whitton Road	16.7	0	0	0	0	0	0	-	-	-	-	-	-	-	22.2	0	0	0	0	0	0
<b>Average</b>	12.9	11.2	9.8	7.3	7.2	7.3	12.2	11.5	9.6	5.8	3.8	3.8	5.8	11.5	12.5	10.7	8.6	6.3	6.3	6.9	12

Red indicates an increase in the rate between 2017 and 2019, 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 Centres, Neighbourhood Centres and Local Parades (all frontages)

	centre vacancy rate (all frontages)								number of vacant units				
	2010	2012	2013	2014	2015	2016	2017	2019	2014	2015	2016	2017	2019
<b>Local centres</b>													
Barnes	12.3	6.3	4.7	4	2.4	2.4	8.6	7.0	5	3	3	11	9
East Twickenham	9.1	7.8	6.5	9.1	17.1	2.7	3.9	5.3	7	13	2	3	4
Hampton Hill	7.8	7	6.2	10.6	11.4	6.2	12.9	13.6	14	15	8	17	18
Hampton Village	12.3	5.1	2.6	2.5	5.1	2.5	1.3	7.4	2	4	2	1	6
Ham Parade	7.3	2.4	2.4	7	7	7	9.3	0	3	3	3	4	0
Kew Gardens Station	4	3.8	3.9	3.9	5.9	4.1	2.0	2.1	2	3	2	1	1
St Margarets	3	4.5	6	4.5	4.5	4.4	8.8	8.7	3	3	3	6	6
Average/total		5.7	4.9	6.3	7.7	4	7.5	7.6	36	44	23	43	44
<b>Neighbourhood centres</b>													
Castelnau	12.5	8.3	12.5	8.3	12.5	0	0	8.0	2	3	0	0	2
Friars Stile Road	19	9.5	14.3	5	14.3	5.3	4.8	4.8	1	3	1	1	1
Hampton Wick	20	23.6	22.2	20.7	29.8	11.1	6.9	5.1	12	17	5	4	3
Heathside	6.1	6.1	9.1	0	0	3	0	15.2	0	0	1	0	5
Sheen Road	7.3	11.9	4.9	4.7	4.9	6.5	4.3	8.7	2	2	3	2	4
Kingston Road	14.3	9.5	0	4.8	23.8	5.6	9.5	4.8	1	5	1	2	1
Stanley Road	8.9	6.7	8.9	4.4	6.7	4.4	6.7	8.7	2	3	2	3	4
White Hart Lane	10.2	8.5	8.3	8.3	13.3	5.4	8.3	8.1	5	8	3	5	5
Average/total		11.4	10.7	8.2	13.6	5.6	5.5	8.0	25	41	16	17	25
<b>Local parades</b>													
Ashburnham Road	0	0	0	0	0	0	0	0	0	0	0	0	0
Fulwell	25	16.7	0	0	0	8.3	0	16.7	0	0	1	0	2
Ham Street / Back Lane	10.5	11.1	5.6	6.3	16.7	11.1	16.7	22.2	1	3	2	3	4
Hampton Nursery Lands	0	0	0	0	0	0	0	9.1	0	0	0	0	1
Hospital Bridge Road	16.7	0	0	0	0	0	0	0	0	0	0	0	0
Kew Green	5.3	11.1	11.1	5.3	5.3	5.3	15.8	0	1	1	1	3	0
Kew Road	5.9	8.8	5.7	2.9	0	2.9	2.9	8.6	1	0	1	1	3
Lower Mortlake Road	6.3	5.9	0	0	0	0	4.5	0	0	0	0	1	0
Nelson Road	27.3	27.3	27.3	18.2	9.1	18.2	18.2	27.3	2	1	2	2	3
Sandycombe Road**	19.5	7	4.7	7	4.7	5.1	7.7	10.3	3	2	2	3	4
Strawberry Hill	14.3	7.1	14.3	14.3	0	0	0	0	2	0	0	0	0
Twickenham Green	12.2	16.7	14.3	23.8	14.3	11.4	4.5	9.1	10	6	5	2	4
Waldegrave Road	13.3	13.3	13.3	13.3	6.7	6.7	13.3	13.3	2	1	1	2	2
St Margarets Road*	27.3	27.3	27.3	27.3	18.2	9.1	9.1	18.2	3	2	1	1	2
Whitton Road	20	6.7	6.7	0	6.7	28.6	26.7	33.3	0	1	4	4	5
Average/total		10.9	8.7	9	6.1	7.1	7.9	10.8	25	17	20	22	30

Red indicates an increase in the rate between 2017 and 2019, black no change, and blue a fall in the rate.

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

Average vacancy rates in designated frontages in local and neighbourhood centres remain lower than the national average. There has been very little change (only one additional unit overall) in the local centres between 2017 and 2019, and no change in designated frontages. In neighbourhood centres there has been an increase of 3% overall, and an increase of 5.1% in Local Parades. Notable increases in vacancy rates in key shopping frontages include Hampton Hill (17.2%) and Heathside (20%), 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. (Table 3) In Hampton Hill, overall vacancies increased by 1 between 2017 and 2019. Heathside had 5 vacancies in 2019, 3 of which were shops, the increase being particularly noticeable as the 2017 survey recorded no vacancies in the centre.

In short, the number of vacancies in the local centres remains very similar to the last time the survey was undertaken, whereas overall number have increased somewhat in neighbourhood centres, notably in Heathside, and also in the local parades where approximately 60% experienced one or more additional vacancy between 2017 and 2019.

### Local centres

The vacancy rates in local centre designated frontages has increased very slightly since 2017 from 5.6% to 5.8% with increases in Hampton Hill, Hampton Village and Kew Gardens (Table 3). There was a slight increase in key shopping frontage vacancies from 4.3% to 5.1% mainly due to large increases in Hampton Hill and Hampton Village. The overall vacancy rate in all frontages (Table 4) has only increased from 7.5% to 7.6% and 3 of the 7 local centres have remained the same or have reduced the number of vacancies since 2017.

### Neighbourhood centres

The vacancy rate in the smaller Neighbourhood Centres has increased since 2017 from an average of 5.5% to 8% in all frontages. 4 of the 8 neighbourhood centres remained the same or experienced a small fall in the number of vacancies, but Castelnau, Heathside, Sheen Road and Stanley Road all saw increases. (Table 4) In designated frontages, the neighbourhood centres saw a similar increase from 4.7% in 2017 to 7.7% in 2019. However, this rate was only slightly above the average historic rate of 7.2%, and lower than in 2010, 2012, and 2015. (Table 3)

### Local parades

Local Parades have seen an increase in vacancies, with an increase of 8 units becoming vacant since 2017 in all frontages. Across the fifteen local parades, increases in each were no more than 2 units compared to 2017, however this follows an increase in vacant units each year since 2015. Whitton Road has again seen an increase in vacant units. This is primarily due to a planned redevelopment of a parade of cafes and restaurants at the junction of Whitton Road and London Road.

Table 5: Summary Table: All Vacancies

In designated shopping frontages: <sup>1</sup>	2012	2013	2014	2015	2016	2017	2019	Average
<b>total number of vacancies</b>	<b>141</b>	<b>127</b>	<b>114</b>	<b>125</b>	<b>91</b>	<b>122</b>	<b>138</b>	<b>123</b>
main town centres	82	79	67	65	58	61	76	71
local centres	25	18	23	30	13	24	25	23
neighbourhood centres	15	14	9	19	9	9	15	13
local parades	19	16	15	11	11	12	21	15
<b>Vacancy rate (%)</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>7.3</b>	<b>6.4</b>

In all frontages:	2012	2013	2014	2015	2016	2017	2019	Average
<b>Total number of vacancies</b>	<b>195</b>	<b>183</b>	<b>168</b>	<b>186</b>	<b>133</b>	<b>163</b>	<b>200</b>	<b>175</b>
<b>Vacancy rate (%)</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>8.1</b>	<b>7.2</b>

<sup>1</sup> See Local Plan policy LP 26 which sets out policy for parts of centres covered by key & secondary shopping frontages.

## 5 Shop Vacancy Rates

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.

The number of vacant shops (A1 use) has increased slightly since 2017 with minor changes in the various centres and parades. The total number of vacancies has increased by 5 units to 83. This was mainly attributable to the increase in vacant shops in local parades. There was a decrease of 12 units recorded as A1 shops uses in all designated frontages between 2017 and 2019 due to change of use class.

Table 6: Summary Table: Vacant shops in designated frontages

Vacant shops:	2012	2013	2014	2015	2016	2017	2019
main town centres	66	64	55	58	44	43	41
local centres	20	15	16	21	14	15	16
neighbourhood centres	22	21	14	25	10	9	9
local parades	18	16	15	9	9	10	16
<b>Total number of shop vacancies</b>	<b>125</b>	<b>116</b>	<b>100</b>	<b>113</b>	<b>77</b>	<b>78</b>	<b>82</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>	<b>7.3%</b>



Table 7: Vacant shops in main centres, local centres and neighbourhood centres (A1 Use Class – All frontages)

	number of vacant shops						percentage of shops which are vacant						actual change in vacant shops		% of vacancies which are shops	
	2013	2014	2015	2016	2017	2019	2013	2014	2015	2016	2017	2019	2016-17	2017-19	2017	2019
<b>main centres</b>																
Richmond	13	14	17	10	10	14	6	6.6	8.2	4.8	4.8	7.4	0	4	58.8	62.5
East Sheen	16	11	10	13	13	7	9.6	6.5	5.9	7.8	7.8	6.1	0	-6	59.1	37.0
Teddington	5	2	4	7	6	3	4.5	1.8	3.6	6.7	5.3	2.7	-1	-3	42.9	33.3
Twickenham	22	21	18	11	9	12	14.5	14.2	12.1	7.2	5.8	9.9	-2	3	52.9	55.6
Whitton	8	7	9	3	6	5	10.5	9.7	12.5	4.1	7.6	7.4	3	-1	85.7	66.7
<b>total/average</b>	64	55	58	44	44	41	8.9	7.7	8.2	6.2	6.1	6.9	0	-2	59.4	51.0
<b>local centres</b>																
Barnes	4	1	1	2	7	2	5.7	1.4	1.4	2.9	11.1	6.3	-5	-3	77.8	55.6
East Twickenham	3	3	7	1	2	3	6.4	6.5	17.1	2.3	4.8	6.1	-1	1	66.7	75.0
Hampton Hill	5	7	7	4	2	7	7.7	12.3	12.3	6.8	4.8	21.8	2	5	66.7	66.7
Hampton Village	1	1	2	1	1	1	2.3	2.3	4.8	2.4	3.8	9.3	0	0	100	66.7
Ham Parade	0	2	1	3	2	0	0	8.7	4.2	14.3	10.5	0	1	-2	100	0.0
Kew Gardens Station	0	0	1	2	0	0	0	0	3.8	8	0	0	2	0	0	0.0
St Margarets	2	2	2	1	1	3	5.3	5.1	5.1	2.6	2.9	9.8	0	2	16.7	66.7
<b>total/average</b>	15	16	21	14	15	16	4.7	5.3	7	4.7	6.0	8.7	-1	1	62.5	63.6
<b>neighbourhood centre</b>																
Castelnau	2	1	2	0	0	1	18.2	9.1	20	0	0.0	10.0	0	1	0	50
Friars Stile Road	2	1	3	0	0	1	14.3	8.3	33.3	0	0.0	11.1	0	1	0	100
Hampton Wick	7	5	7	3	1	0	38.9	26.3	43.8	20	25.0	0	2	-1	100	0
Heathside	3	0	0	0	0	3	17.6	0	0	0	0	21.4	0	3	0	75
Sheen Road	0	0	1	1	0	0	0	0	5.3	5.3	0	0	1	0	0	0
Kingston Road	0	1	4	1	2	1	0	7.7	40	9.1	16.7	7.7	-1	-1	100	100
Stanley Road	3	1	1	2	2	1	13	4	4	8.3	9.1	4.2	0	-1	100	50
White Hart Lane	4	5	7	3	4	2	12.9	16.7	25	10.7	19.0	10.5	-1	-2	100	50
<b>total/average</b>	21	14	25	10	9	9	14.4	9.3	18.2	7.3	8.0	8.4	1	0	100	60

Notes:

Red indicates an increase in the rate between 2017 and 2019, black no change, and blue a fall in the rate.

Table 8: Vacant shops in local parades (A1 Use Class – All Frontages)

	number of vacant shops						percentage of shops which are vacant						actual change in vacant shops		% of vacancies which are shops	
	2013	2014	2015	2016	2017	2019	2013	2014	2015	2016	2017	2019	2016-17	2017-19	2017	2019
<b>local parades</b>																
Ashburnham Road	0	0	0	0	0	1	0	0	0	0	0	<b>0</b>	0	1	0	100
Fulwell	0	0	0	0	0	2	0	0	0	0	0	<b>40</b>	0	2	0	100
Ham Street / Back Lane	1	1	2	2	3	3	11.1	12.5	25	22.2	42.9	<b>37.5</b>	1	0	100	75
Hampton Nursery Lands	0	0	0	0	0	0	0	0	0	0	0	<b>0</b>	0	0	0	0
Hospital Bridge Road	0	0	0	0	0	0	0	0	0	0	0	<b>0</b>	0	0	0	0
Kew Green	2	1	1	1	2	0	18.2	11.1	11.1	11.1	33.3	<b>0</b>	1	-2	67	0
Kew Road	1	0	0	1	1	2	6.3	0	0	7.7	7.7	<b>15.4</b>	0	1	100	67
Lower Mortlake Road	0	0	0	0	0	0	0	0	0	0	0	<b>0</b>	0	0	0	0
Nelson Road	2	1	1	1	1	2	33.3	14.3	14.3	14.3	14.3	<b>40.0</b>	0	1	50	67
Sandycombe Road *	1	1	0	0	1	2	5.9	6.3	0	0	11.1	<b>13.3</b>	1	1	33	50
Strawberry Hill	2	2	0	0	0	0	28.6	28.6	0	0	0	<b>0</b>	0	0	0	0
Twickenham Green	3	4	3	2	0	1	16.7	25	16.7	11.8	0	<b>5</b>	-2	1	0	25
Waldegrave Road	1	2	1	1	1	1	11.1	25	14.3	14.3	14.3	<b>14.3</b>	0	0	50	50
St Margarets Road **	3	3	1	1	1	2	75	75	20	20	20	<b>50</b>	0	1	100	100
Whitton Road	0	0	0	0	0	0	0	0	0	0	0	<b>0</b>	0	0	0	0
<b>total/average</b>	16	15	9	9	10	16	12	11.7	6.9	7	9.5	<b>12.8</b>	1	6	50	52.8

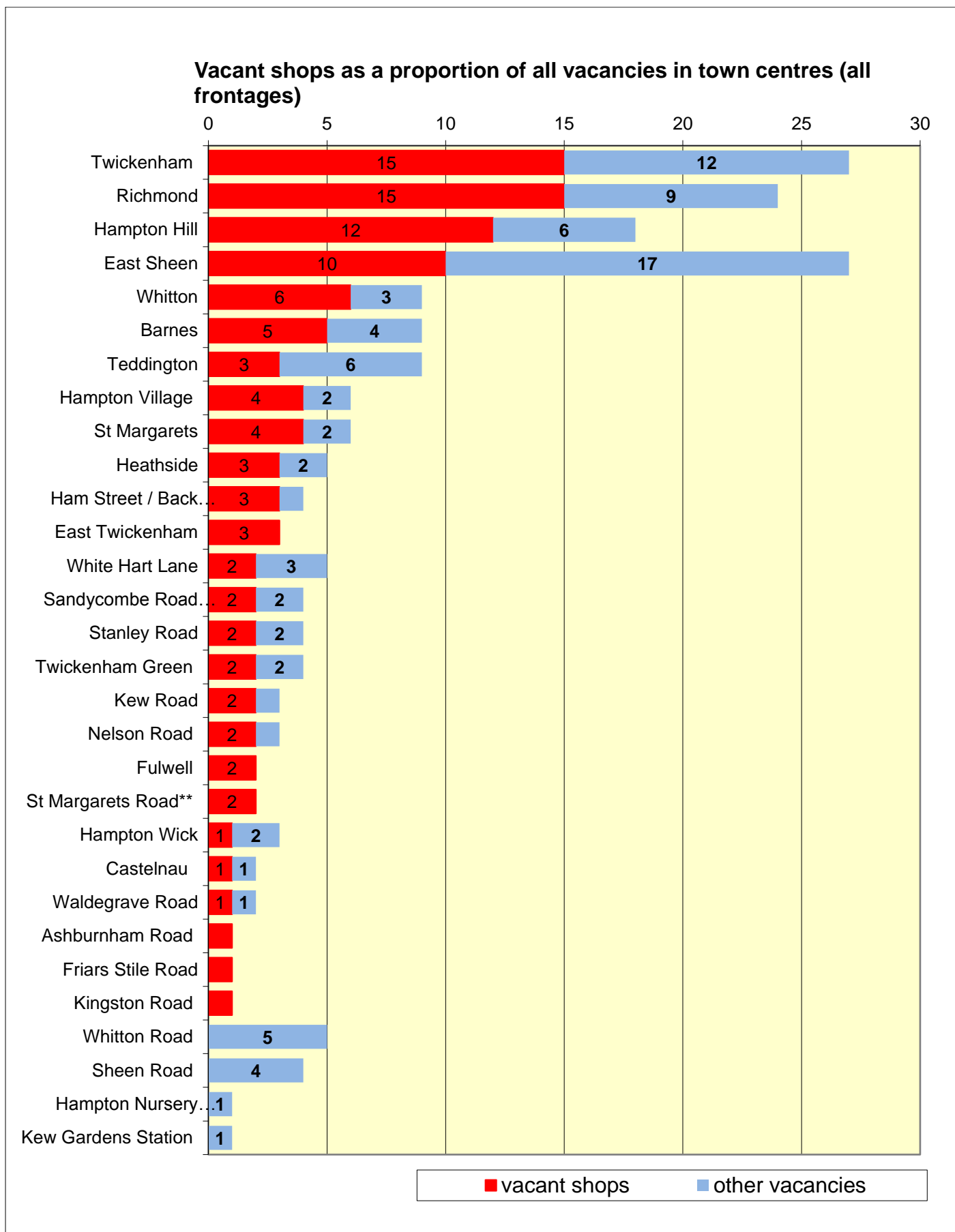
## Notes:

**Red** indicates an increase in the rate between 2017 and 2019, black no change, and **blue** a fall in the rate.

\* Sandycombe Road (Kew)

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

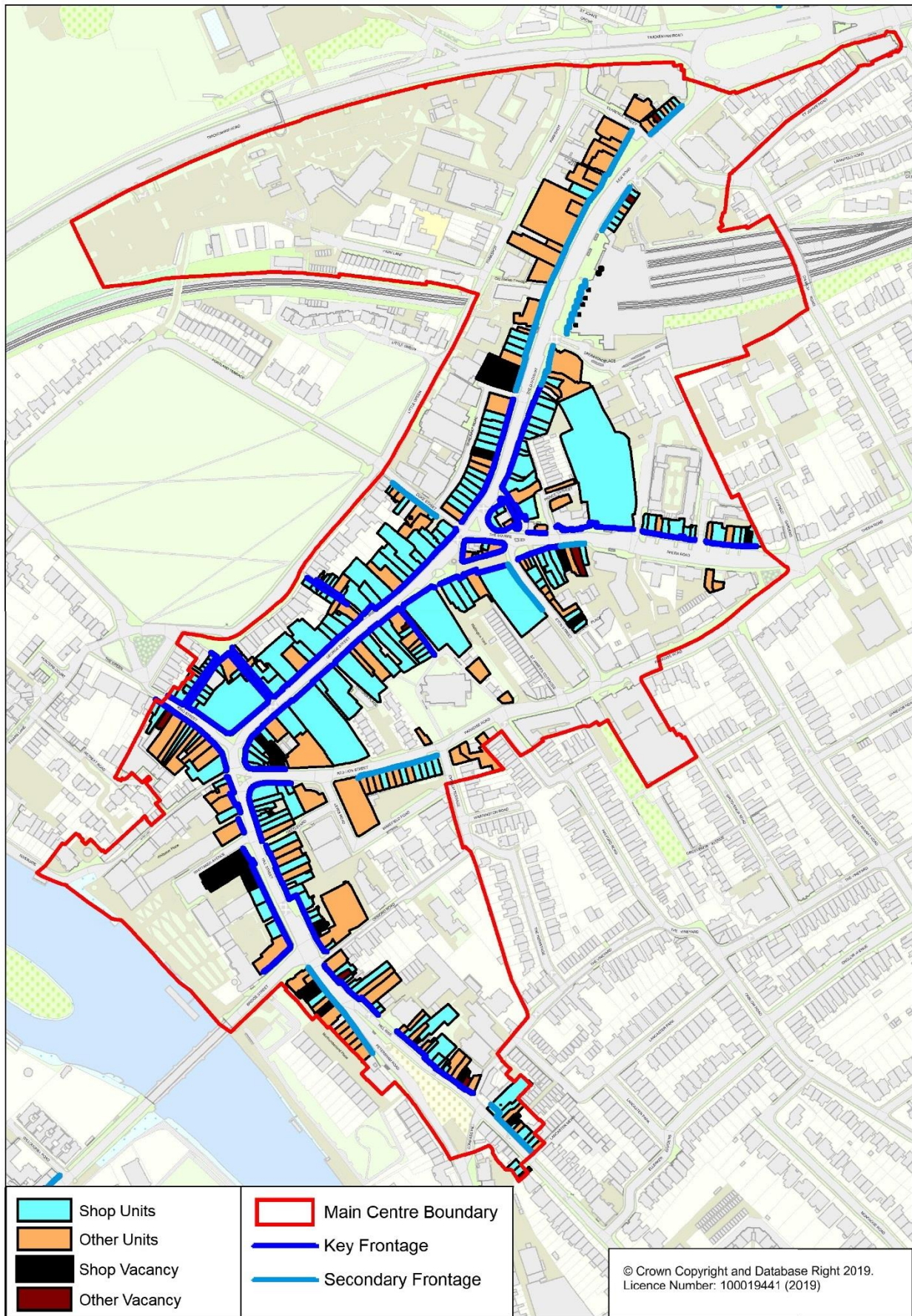
Figure 3: Vacant shops as a proportion of all vacancies in town centres (designated frontages)





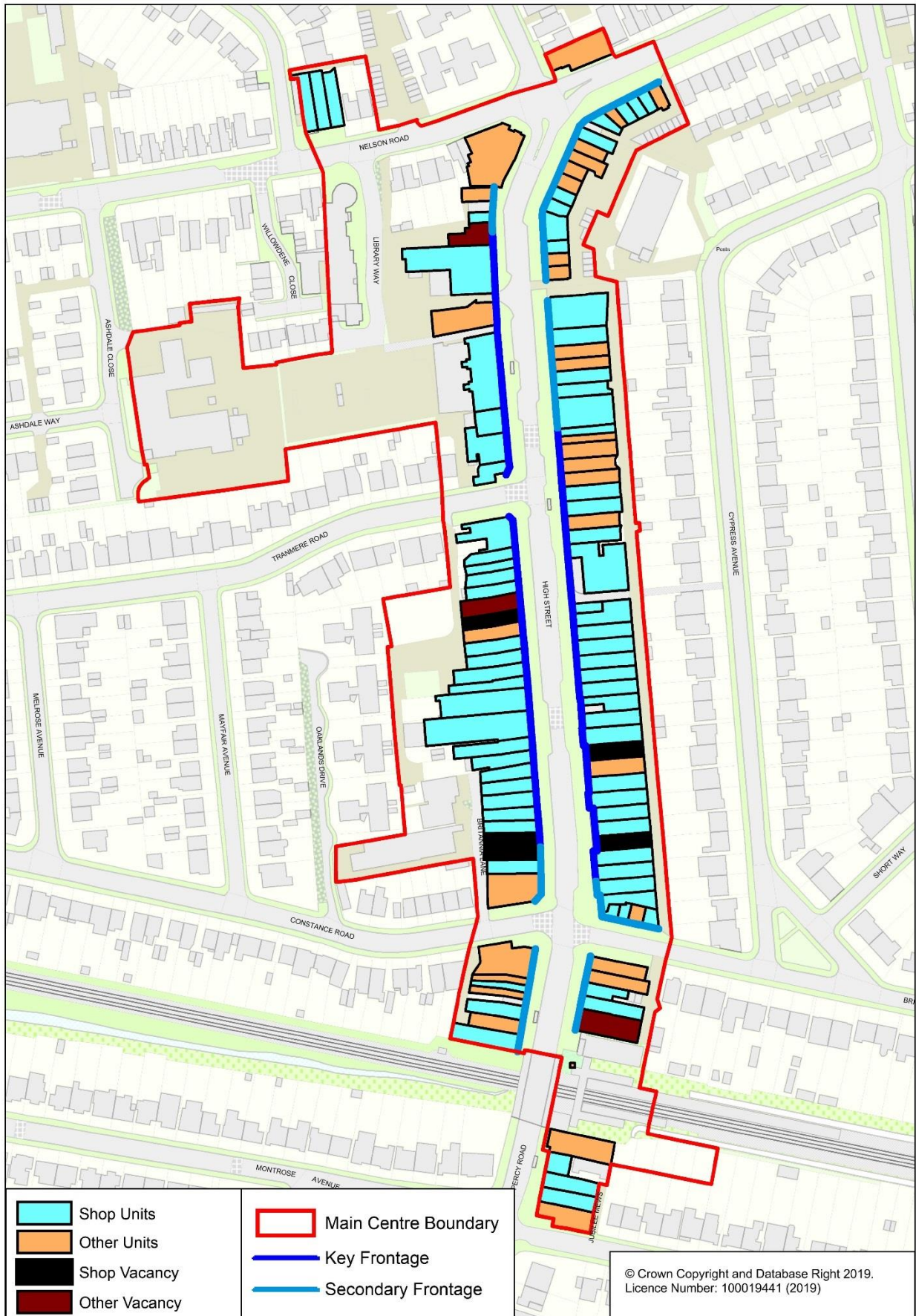
# Appendix 1: Maps of vacant units in the five main centres

## Richmond Centre



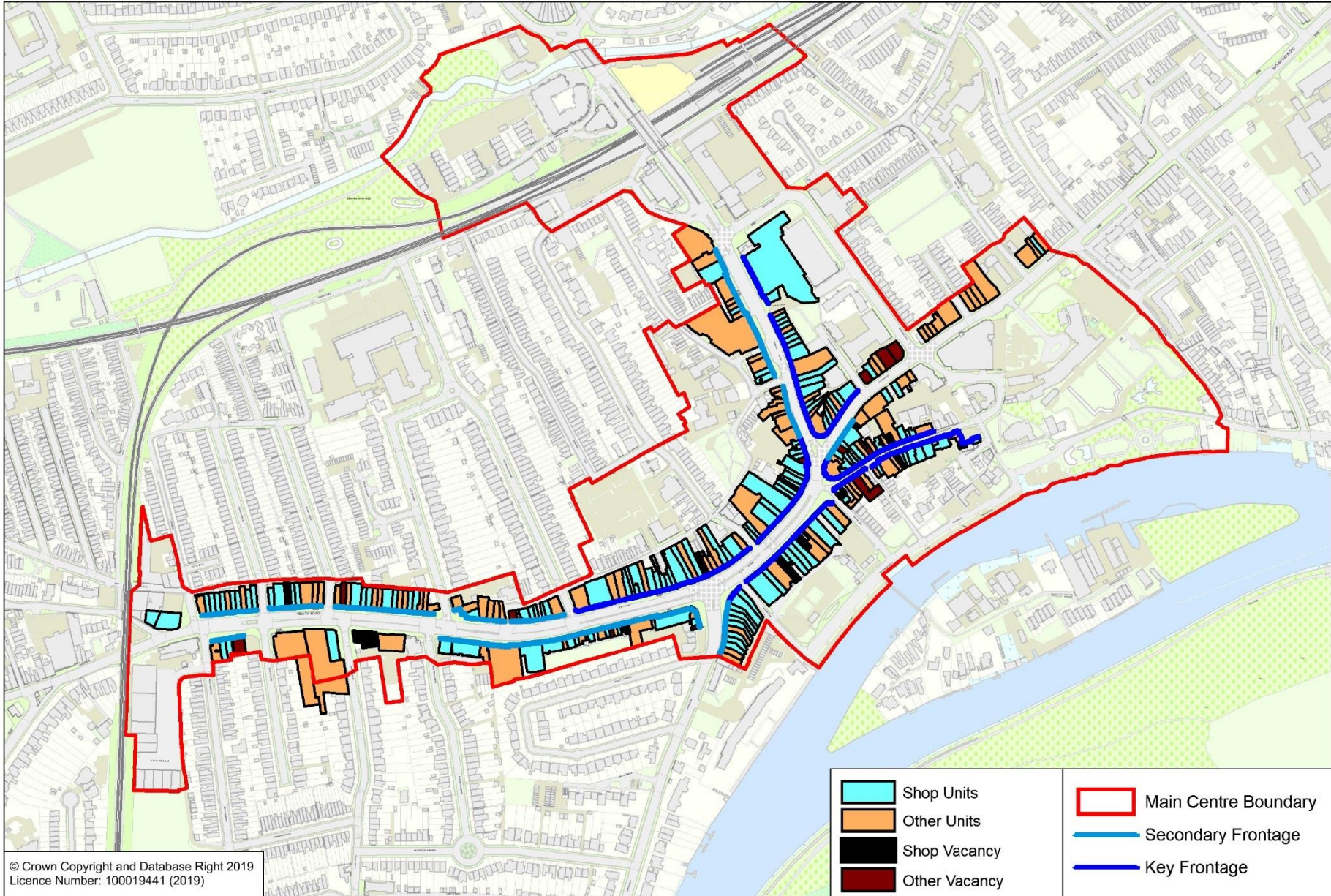


# Whitton Centre



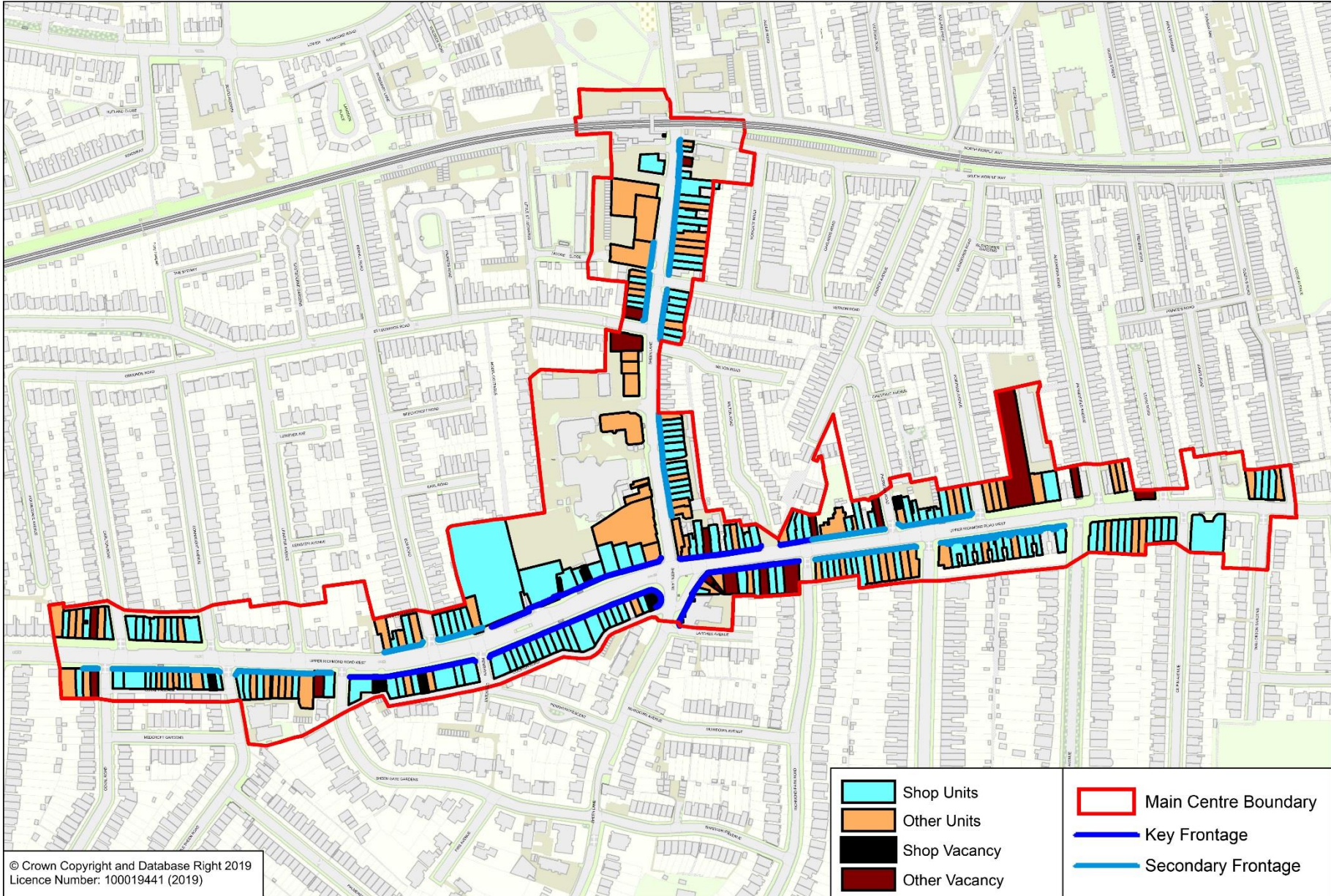


Twickenham Centre





# East Sheen Centre





# Teddington Centre

