

2020 Town Centre Land Use Survey

Planning

9 February 2021

Local Plan Monitoring Report

2020 Town 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 around 2,500 properties. The 2020 survey took place between and 24th August and 8th September, which followed the national closure of non-essential retail units and most other businesses between 26th March and 15th June due to the Covid-19 pandemic. A small number of local parades were surveyed later in December, with additional feedback from Town Centre managers and local Councillors received in October.

Where a business was closed when surveyed, and no further information was available, it was recorded as vacant for the purposes of this report. It is possible that this approach could inflate vacancy levels if the business were to subsequently re-open, however further restrictions following the survey period in the Autumn, with the closure of non-essential retail in December are likely to have had further impacts and this approach reflects the rapidly changing situation.

2. [Summary of Vacancies](#)

The total number of vacant units in the borough's high streets and local parades has increased overall and the vacancy rate is at the highest level seen for some years. Although there have been increases in vacancy rates in some areas, there have been decreases in many of the smaller neighbourhood centres and local parades. Table 1 below shows that the total number of vacancies in all frontages has only increased marginally by 5 units since 2019.

The main town centres have seen a significant increase of almost 20 vacant units compared to 2019, and the local centres have seen more than 10 units close in the last year. The neighbourhood centres and local parades, however, have improved, with a reduction in the number of vacant units when compared to 2019.

Richmond and Twickenham have both seen an increase in the number of vacancies in the key shopping frontages, in part due to the closure of several large national chains. Teddington however has seen an increase in vacancies in the secondary shopping frontages, whilst the key shopping frontages have remained the same as in 2019.

At 8.2% the borough centre vacancy rate in designated frontages¹ has risen noticeably from the 2019 rate of 7.4%. It is now similar to the borough vacancy rate for all frontages, whereas historically vacancy rates have generally been lower in designated frontages.

Table 1: Summary Table: All vacancies

In designated shopping frontages: ²	2012	2013	2014	2015	2016	2017	2019	2020	Average
total number of vacancies	141	127	114	125	91	106*	137	155	125
main centres	82	79	67	65	58	61	76	95	70
local centres	25	18	23	30	13	24	25	36	23
neighbourhood centres	15	14	9	19	9	9	15	9	13
local parades	19	16	15	11	11	12	21	15	15
Vacancy rate (%)	7.5	6.8	6.1	6.7	4.9	5.7	7.4	8.2	6.7

In all frontages:	2012	2013	2014	2015	2016	2017	2019	2020	Average
Total number of vacancies	195	183	168	186	133	163	200	205	179
Vacancy rate (%)	8.1	7.6	6.9	7.7	5.5	6.6	8.0	8.3	7.4

* The total number of vacancies previously reported in designated frontages in 2017 had been corrected from 122 to 106

¹ Designated frontages as classified in the [Local Plan](#) adopted 2018. See Appendix 4 and Policies Map.

² See Local Plan policy LP 26 which sets out policy for parts of centres covered by key & secondary shopping frontages

3. Centre Vacancy Rates

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

- The overall number of vacant units in the borough has increased slightly since 2019 with 205 vacant units, compared to 200 in 2019. This follows the previous 2 years when the number of vacant units were significantly lower at 163 in 2017 and 133 in 2016. The overall vacancy rate in all frontages has increased marginally to **8.3% in 2020** from 8.0% in 2019.
- At 8.2% the borough centre vacancy rate in designated frontages³ continues to be low and remains well below the national average of around 13%.⁴

Figure 1: Boroughwide Centre Vacancy Rate (All frontages)

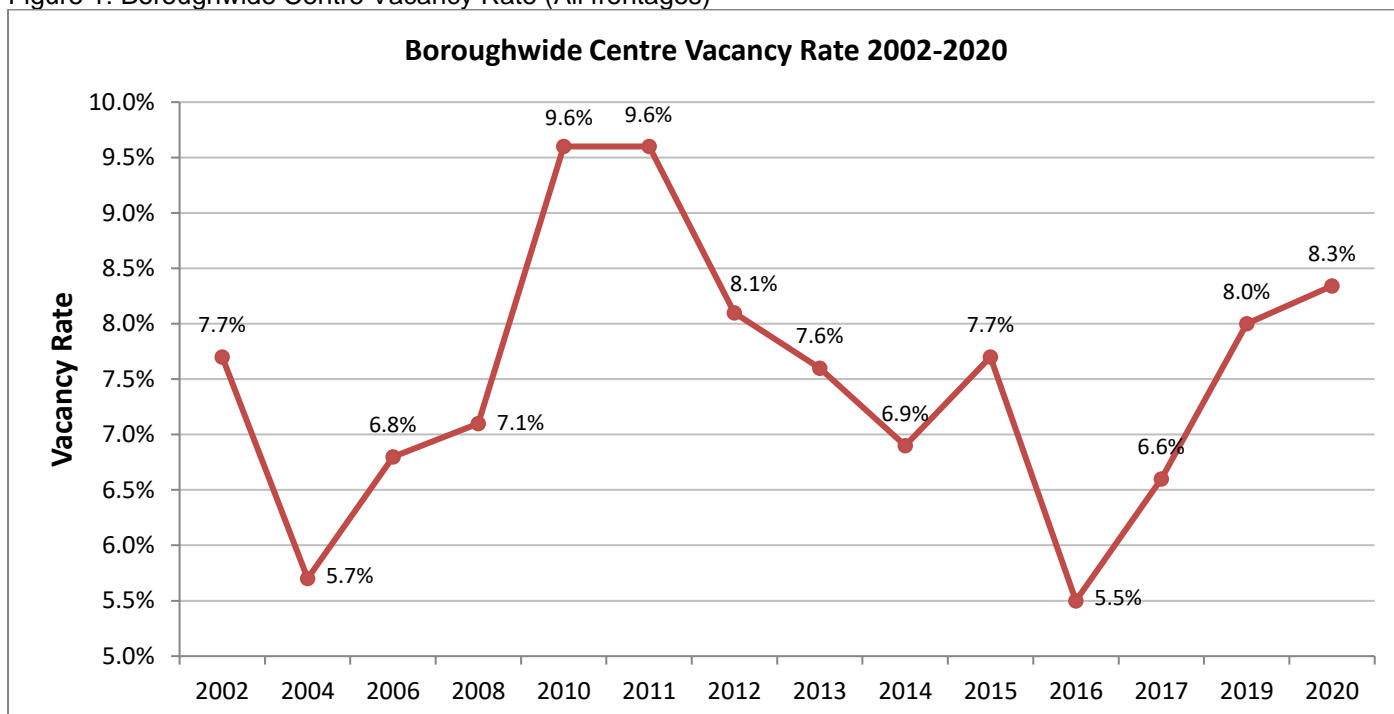


Table 2: Boroughwide Centre Vacancy Rate

Year	2002	2004	2006	2008	2010	2011	2012	2013	2014	2015	2016	2017	2019	2020
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%	8.3%

³ Designated frontages as classified in the Local Plan adopted 2018. See Appendix 4 and Policies Map.

⁴ <https://brc.org.uk/news/corporate-affairs/shops-shutter-as-covid-continues/>

4. Town Centre Vacancy Rates

- 95 units in **all designated frontages** in the five town⁵ centres were vacant in 2020, which is a vacancy rate of 8.8%. This is compared to 7.1% in 2019 and 5.7% of units in 2017.
- Vacancy rates in **key shopping frontages** are slightly higher with 9.3% of units vacant, compared with 7.4% recorded in 2019.
- The main centre vacancy rate in **all frontages** is higher than in designated frontages and has increased from 7.5% in 2019 to 9.0% in 2020.

Figure 2: Main Centre Vacancy Rate (All frontages)

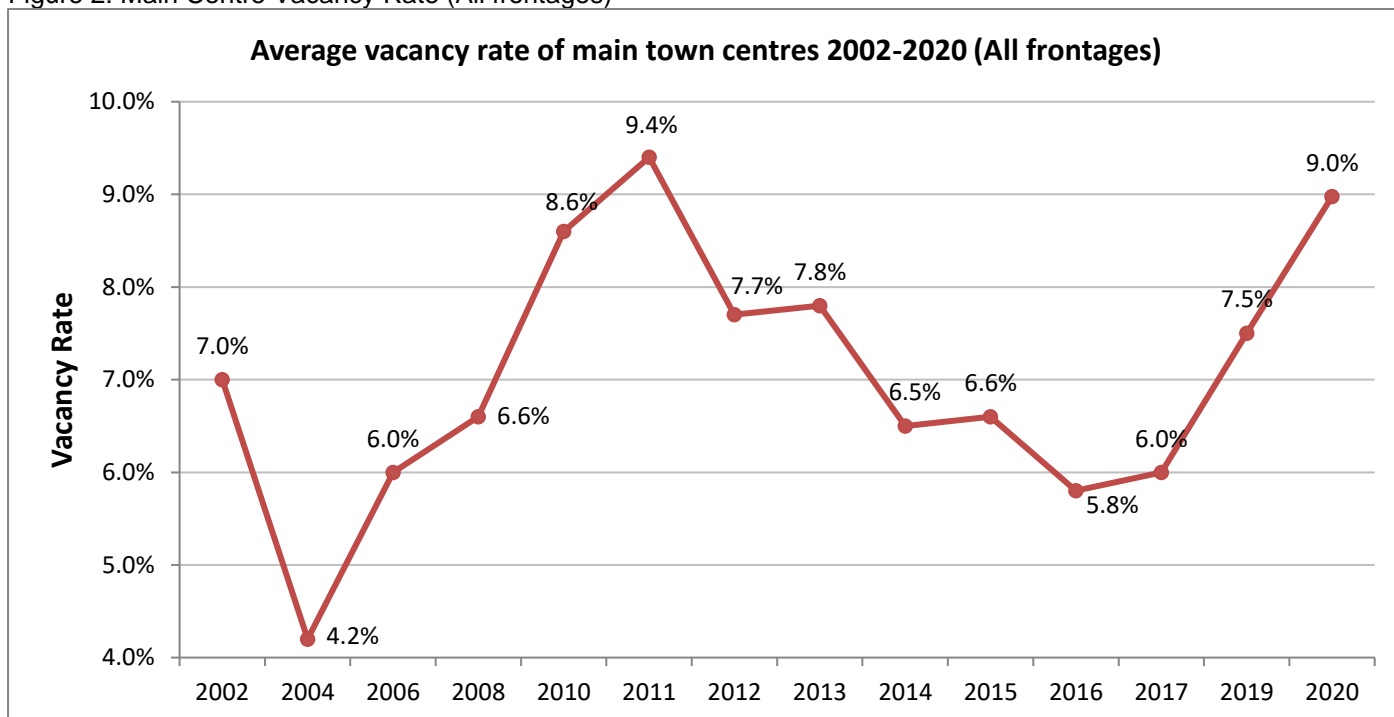


Table 3: Main Centre Vacancy Rate (All frontages)

Year	2002	2004	2006	2008	2010	2011	2012	2013	2014	2015	2016	2017	2019	2020
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%	9.0%

- The vacancy rate in **all frontages** in the 5 main centres has increased to 9% in 2020. The greatest rise of 3.6% was in Teddington, which previously had the lowest vacancy rate in 2019. Richmond town centre increased significantly by 3% to 9.7%, and East Sheen had the highest vacancy rate of 9.9%. Whitton saw a slight decrease from 6.6% down to 5.2%.

Table 4: Town Centre Vacancy Rate (All frontages)

	2014	2015	2016	2017	2019	2020	Average
Richmond	6.5	7.3	5.3	4.7	6.7	9.7	6.7
East Sheen	5.9	4.8	6.2	7.6	9.3	9.9	7.3
Teddington	2.6	3.6	7.7	7.2	4.6	8.2	5.7
Twickenham	9.4	8.4	5.7	5.7	9.1	9.4	7.9
Whitton	6.7	9	3.8	5.2	6.6	5.2	6.1
Total	6.5	6.6	5.8	6.0	7.5	9.0	6.9

⁵ Town centres are synonymous with main centres as defined in the adopted Local Plan

5. 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 website⁶.

The Council has undertaken Land Use Surveys of borough centres in the summer months since the late 1990s. They cover 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. The impact of the Covid-19 restrictions was also an important factor when assessing if a business was operating, as it likely that many units had only recently stopped trading and the furniture and fittings remained in place.

Only the ground floor occupier is recorded unless specified. It is therefore not a survey of floorspace (central 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 land use, 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.

⁶ http://www.richmond.gov.uk/home/services/planning/planning_policy/local_plan/authority_monitoring_report.htm

6. Covid 19 Pandemic – Retail restrictions

Due to the Covid 19 pandemic all non-essential businesses were required to close⁷ between 26th March and 15th June 2020. Social distancing guidelines applied in the summer months, with queueing systems in place and various adaptations to pedestrian areas for safety reasons. A further set of restrictions were put into place in October which again closed non-essential businesses.

- 26th March – The 'Lockdown Regulations' (SI 2020/350⁸) come into effect, significantly extending the range of businesses that are required by law to close with immediate effect including all retail businesses not on an approved list. These regulations also include significant restrictions on freedom of movement: "no person may leave the place where they are living without reasonable excuse"
- 15th June – An amendment of the Regulations (SI 2020/588⁹) comes into effect, allowing the general re-opening of retail shops and public-facing businesses apart from those that are on a list of specific exclusions such as restaurants, bars, pubs, cinemas, theatres, museums, hairdressers, indoor sports and leisure facilities.
- 4th July - The previous list of businesses required to close is revoked and re-enacted, with fewer restrictions. (SI 2020/588¹⁰) The only businesses that are still completely barred from re-opening include nail bars and tanning booths; spas and beauty salons (except hairdressers); massage parlours, tattoo parlours, gyms, sports courts, and fitness and dance studios
- 13th July - amendments allow certain businesses to re-open, specifically nail bars and salons, tanning booths and salons, spas and beauty salons, massage parlours and tattoo parlours.
- September - regulations require certain businesses selling food and drink for consumption on the premises (including restaurants, cafes, bars and pubs) to obtain the contact details of people entering the premises
- 5th November – 2nd December - All non-essential retail, including, clothing and electronics stores, travel agents, betting shops, tailors, tobacco and vape shops, must close. Non-essential retail can remain open for delivery to customers and click-and-collect.
- 5th January 2021 – A new national lockdown comes into effect

7. 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 most recent research suggests that the capital, and the borough specifically, still require additional retail floorspace, although the research was carried out prior to the pandemic.

As outlined above, the Covid-19 pandemic has further changed the retail sector, accelerating existing trends with a necessarily increased demand for internet shopping particularly for home deliveries. At this stage, it is not possible to predict the long-term implications of the pandemic on the High Street, although it is likely to be significant, potentially permanently affecting the way we shop and how we use our borough centres.

The following section looks in detail at changes introduced to permitted development rights, in particular the creation of Class E, the combined commercial class. This is perhaps the most significant change made affecting the planning of centres in decades.

It has never been more important and timely to monitor vacancy rates and the make-up of centres in the borough and such land use surveys are likely to be the most accurate way to measure change as planning permission for the change of use between many town centre uses is no longer required.

⁷ Health Protection (Coronavirus, Restrictions) (England) Regulations 2020

⁸ <https://www.legislation.gov.uk/uksi/2020/350/contents/made>

⁹ <https://www.legislation.gov.uk/uksi/2020/588/regulation/2/made>

¹⁰ The Health Protection (Coronavirus, Restrictions) (No. 2) (England) Regulations 2020

8. 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:

<p>Came into force in May 2013</p>	<p>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.</p> <p>Some exemptions but no prior approval process.</p> <p>change from B1 office to residential. Initially this change was temporary until 30th May 2016 but was subsequently made permanent in April 2016¹¹. The Council has made an Article 4 Direction to restrict this change in various centres across the borough.¹²</p> <p>Some exemptions and limited prior approval process.</p>
<p>Came into force in April 2014</p>	<p>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).</p> <p>Some exemptions and prior approval process.</p> <p>retail to banks and building societies (deposit-takers) - allows change of use from a shop (A1) to a bank or a building society.</p> <p>No prior approval process and few exemptions.</p>
<p>Came into force in April 2015</p>	<p>change of use from shops (A1) to financial and professional services (A2).</p> <p>There is no prior approval process and no exemptions.</p>
<p>Came into force in April 2017</p>	<p>changes to permitted development rights to allow change of use from shops (A1 Use Class) to financial services (A2 Use Class).</p> <p>The Council has made an Article 4 Direction to restrict this change in various centres across the borough.</p>
<p>Came into force in September 2020¹³</p>	<p>extending some temporary permitted development rights; takeaway food operations from restaurants, cafes and drinking establishments, and some emergency development rights.</p> <p>Streamlining the existing 16 Use Classes into 11 by introducing three new broad Use Classes. The significant change being the introduction of the combined commercial class, (See also Section below for more detail.)</p> <ul style="list-style-type: none"> • Class E - subsuming the existing A1, A2, A3, B1 (including R&D) and selected D1 and D2 Use Classes which includes retail, food, financial services, indoor sport and fitness, medical or health services, nurseries, offices and light industry. Class E will also include 'other services which it is appropriate to provide in a commercial, business or service locality'. This is expected to comprise uses such as travel agents and post offices which were previously classified within Class A1. • Class F1 - A new Learning and Non-Residential Institutions Use Class, known as F1, embraces the remaining parts of the existing D1 Use Classes that are not included within the new Class E. This will include education, non-commercial galleries, law courts, libraries, museums, places of worship and public halls. • Class F2 - A new Local Community Use Class, known as F2, will comprises part of the current A1 and D2 Use Classes and includes small corner shops*, local community halls, outdoor recreational areas and swimming pools. <p>* meeting criteria which means that this protection is unlikely to be applicable in this borough</p> <p>Drinking establishments are categorised as sui generis.</p> <p>For any reference to Permitted Development rights, and for restrictions to them or applications for Prior Approval, the Use Classes in effect prior to 1 September 2020 will be used until the end of July 2021.</p> <p>Please note PD rights may be amended by later versions of the General Permitted Development Order.</p>

¹¹ 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.

¹² https://www.richmond.gov.uk/article_4_directions_offices_to_residential

¹³ <https://www.gov.uk/guidance/ensuring-the-vitality-of-town-centres>

9. Introduction of combined business class:

Class E (Commercial, business and service)

This new single use class amalgamates previous use classes (A1) Shops, (A2) financial/professional services, (A3) cafés/restaurants, (D1 part) medical health facilities, creche and nurseries (D2 part) indoor sports/fitness, and (B1) office/business/light industrial uses.

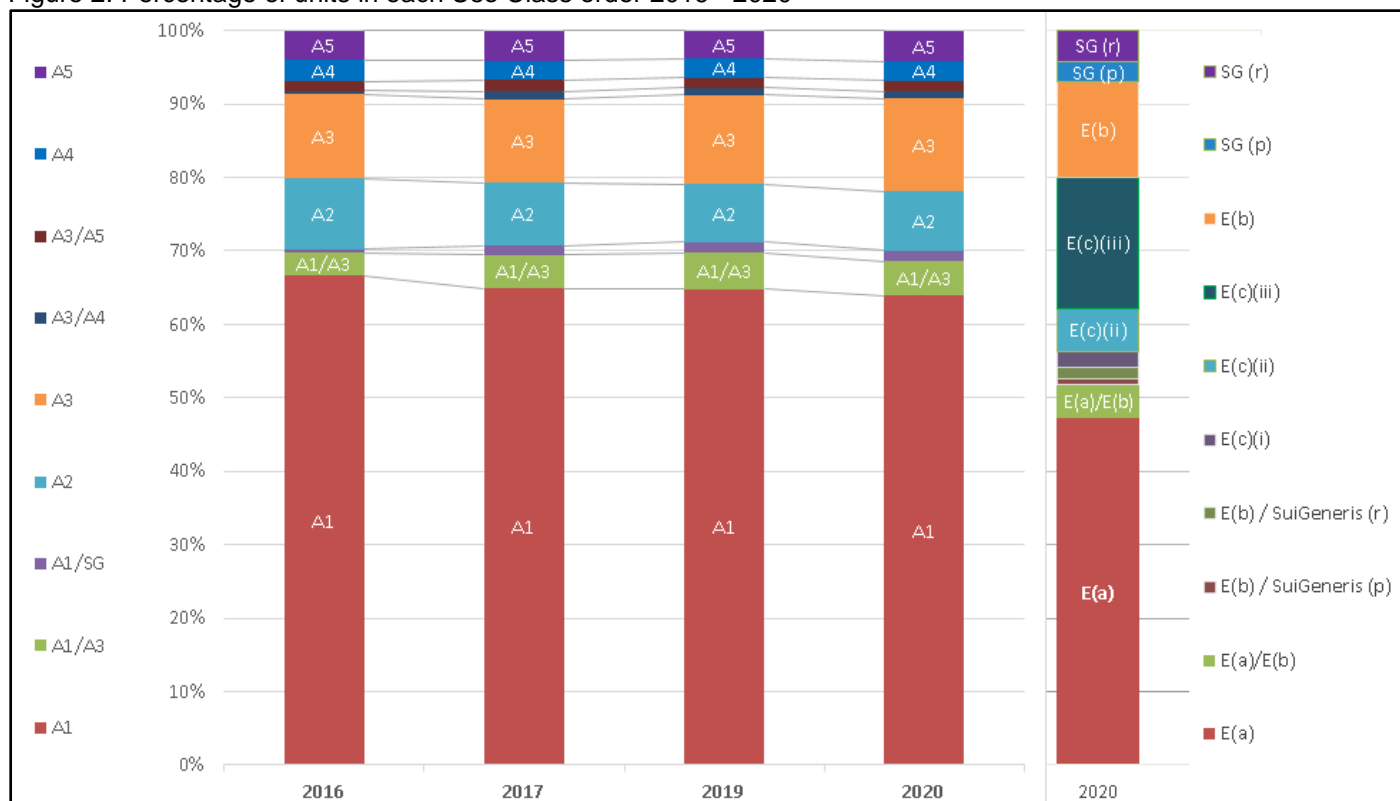
The sui generis use class amalgamates many of the remaining use classes, including pubs and bars, hot food takeaway and cinemas.

Use	Use Class prior to 31 st August 2020	Use Class from 1 st September 2020
Shop	A1	E
Financial & professional services (not medical)	A2	E
Café or restaurant	A3	E
Pub, wine bar or drinking establishment	A4	Sui generis
Takeaway	A5	Sui generis
Office other than a use within Class A2	B1a	E
Clinics, health centres, creches, day nurseries, day centre	D1	E
Cinemas, concert halls, bingo halls and dance halls	D2	Sui generis

The above table is a simplified list identifying the relevant associated retail uses for the purposes of this report.

Data for 2020 are presented in Figure 2 for land uses categorised as they were before the introduction of Class E to allow for comparison with previous data and also as per the revised Use Classes Order (as from 1st September 2020),

Figure 2: Percentage of units in each Use Class order 2016 - 2020



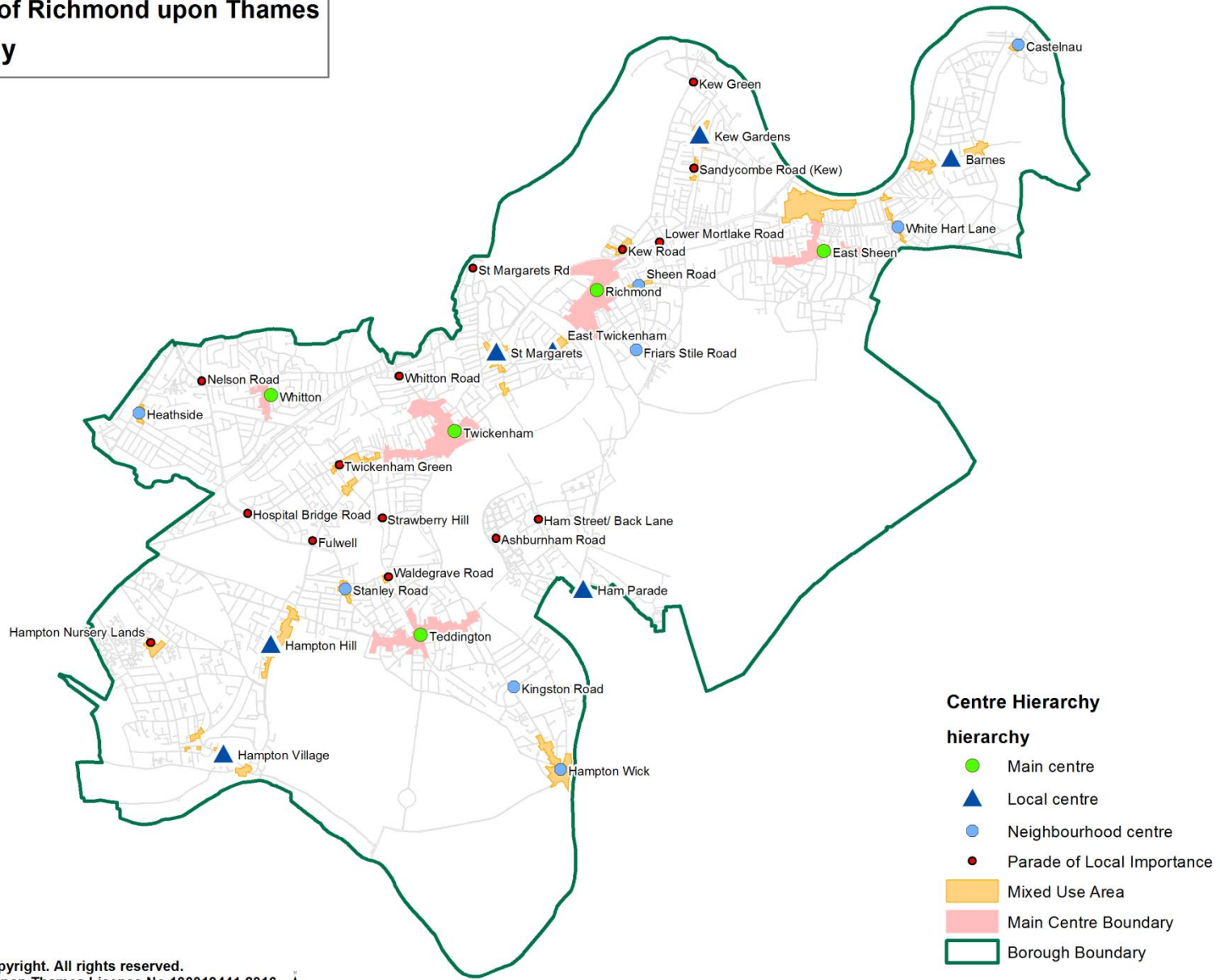
10. The Borough's centres

Table 5: Centre hierarchy

Type of centre	Name of centre
Town (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

Hierarchy as set out in the adopted Local Plan LP25.

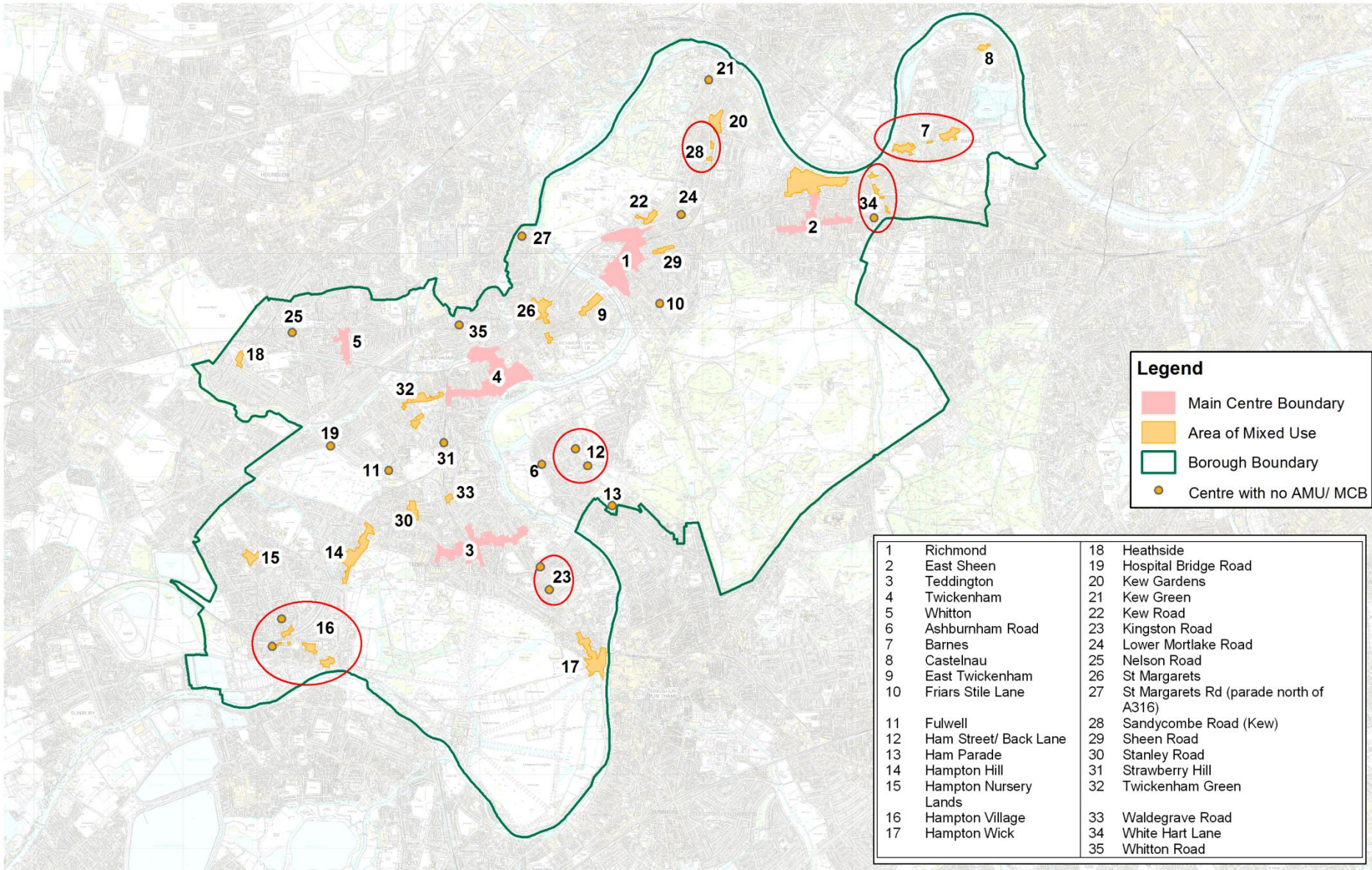
London Borough of Richmond upon Thames Centre Hierarchy



Local Plan designations
Produced by Local Plan Team

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Centres in Richmond upon Thames



Legend

- Main Centre Boundary
- Area of Mixed Use
- Borough Boundary
- Centre with no AMU/ MCB

1 Richmond	18 Heathside
2 East Sheen	19 Hospital Bridge Road
3 Teddington	20 Kew Gardens
4 Twickenham	21 Kew Green
5 Whitton	22 Kew Road
6 Ashburnham Road	23 Kingston Road
7 Barnes	24 Lower Mortlake Road
8 Castelnau	25 Nelson Road
9 East Twickenham	26 St Margarets
10 Friars Stile Lane	27 St Margarets Rd (parade north of A316)
11 Fulwell	28 Sandycombe Road (Kew)
12 Ham Street/ Back Lane	29 Sheen Road
13 Ham Parade	30 Stanley Road
14 Hampton Hill	31 Strawberry Hill
15 Hampton Nursery Lands	32 Twickenham Green
16 Hampton Village	33 Waldegrave Road
17 Hampton Wick	34 White Hart Lane
	35 Whitton Road

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Red circles identify extent of designated frontage in that particular centre

Local Plan designations
 Produced by Local Plan Team

11. Town Centre vacancy rates

Table 6: Vacancy rates in 5 town centres (designated frontages)

	key shopping frontage							secondary shopping frontage							all designated frontage						
	2012	2014	2015	2016	2017	2019	2020	2012	2014	2015	2016	2017	2019	2020	2012	2014	2015	2016	2017	2019	2020
Richmond	7.8	6	7.7	4.7	4.3	4.8	10.8	10	6.9	5.9	7.1	5.9	9.8	8.6	8.4	6.3	7.2	5.5	4.8	6.3	10.1
East Sheen	2.6	5.3	2.6	3.9	6.6	14.7	11.8	6.6	6.8	3.8	6	9.0	5.2	6.0	5.2	6.2	3.3	5.3	8.1	8.6	8.1
Teddington	2.6	3.4	3.4	7.7	4.3	6.0	6.0	10	1.7	3.3	6.7	6.7	5.1	15.3	5.1	2.8	3.4	7.3	5.1	5.7	9.1
Twickenham	8.3	9.2	7.6	4.6	6.2	8.5	11.4	10.3	7.9	7.0	6.1	3.5	7.8	7.0	9.3	8.6	7.3	5.3	4.9	8.2	9.3
Whitton	10.3	7.1	8.8	1.8	7.0	8.6	3.6	10	6	10.2	4.2	6.1	6.0	8.0	10.2	6.6	9.4	2.9	6.6	7.4	5.7
Average	6.5	6.2	6.4	4.9	5.2	7.4	9.5	9.2	6.3	5.7	6.2	6.3	6.7	8.2	7.6	6.3	6.1	5.4	5.7	7.2	8.9

Table 7: Vacancy rates in 5 town centres (all frontages)

	centre vacancy rate (all frontages)							number of vacant units				
	2012	2014	2015	2016	2017	2019	2020	2015	2016	2017	2019	2020
Richmond	8.3	6.5	7.3	5.3	4.7	6.7	9.7	26	19	17	24	35
East Sheen	6.5	5.9	4.8	6.2	7.6	9.3	9.9	14	18	22	27	29
Teddington	5.2	2.6	3.6	7.7	7.2	4.6	8.2	7	15	14	9	16
Twickenham	8.7	9.4	8.4	5.7	5.7	9.1	9.4	25	17	17	27	28
Whitton	10.4	6.7	9.0	3.8	5.2	6.6	5.2	12	5	7	9	7
Average/total	7.7	6.5	6.6	5.8	6.0	7.5	9.0	84	74	77	96	115

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.

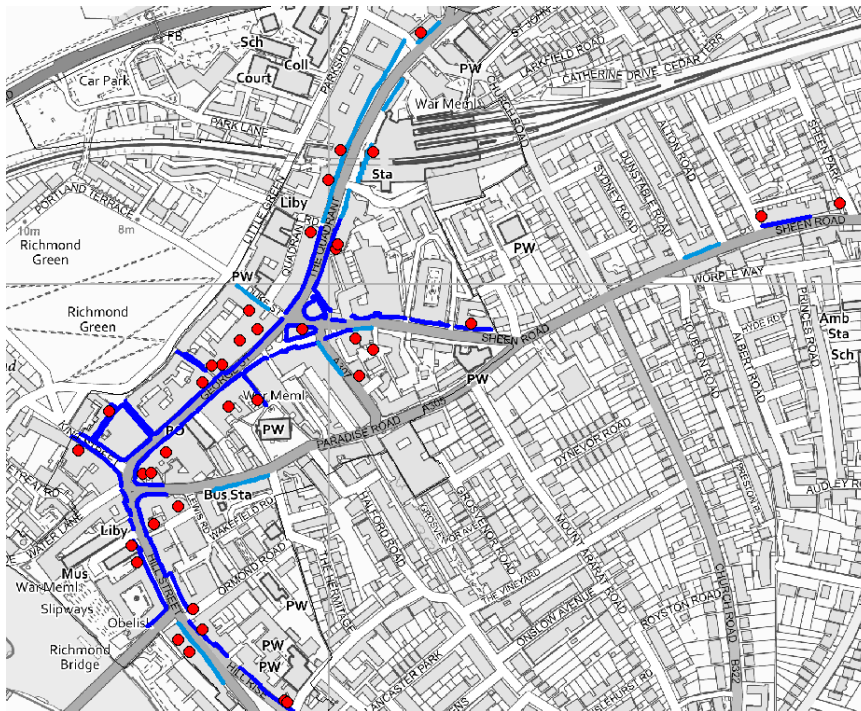
12. Town centre vacant units and vacancy rates

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. This may be even more relevant for the 2020 data, where due to the pandemic, the long term future of the business may still be in question. 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 all frontages in the borough's five main centres in 2020 is 8.9%, which follows a year on year rise since 2016, when a 5.8% vacancy rate was recorded. Numbers of vacant units have risen by 19 to 115 across the five centres. Individually, centres have experienced some change, with Richmond and Teddington increasing by 3% and 3.6% respectively. East Sheen and Twickenham remained at a similar vacancy rate to the 2019 levels, and Whitton saw a slight decrease in vacancies.

Richmond

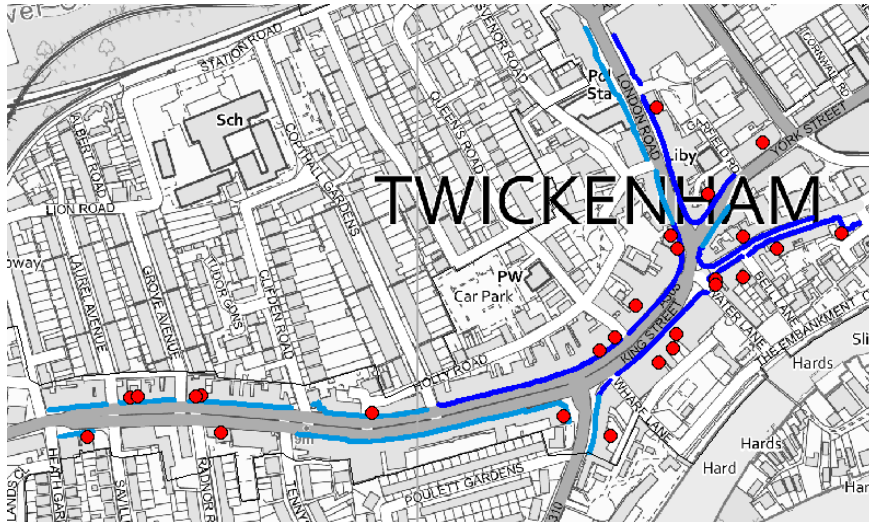
- Out of the 35 vacancies in Richmond town centre, 27 were vacant units, 7 were closed when surveyed and 1 unit was undergoing refurbishment.
- This compares to 24 vacancies recorded in 2019.
- Vacancies are spread evenly across the centre with 9 vacant units on George Street, 5 on Hill Rise and 4 on Hill Street, 5 at the Quadrant and 2 on Sheen Road.
- 16 units were previously recorded in 2019 as A1 shops, and 7 units were previously recorded as vacant A1 shops.
- 5 of the newly vacant units were clothes shops, and a bank, estate agent and opticians were also newly vacant. A travel agent, cafe and cinema were also temporarily closed due to Covid when surveyed.
- 25 Vacant units were in Key Frontages, and the remainder were in Secondary Frontages



The increase in vacancies in Richmond town centre has largely been in key shopping frontages rather than secondary shopping frontages and are therefore more visible changes. Research suggests that multiple retailers may have been hit harder than independents. Future surveys and monitoring will need to continue to take account of change in the centre which has historically experienced strong demand from retailers and other sectors. The town centre has a good independent retail sector and strong leisure and cultural offer.

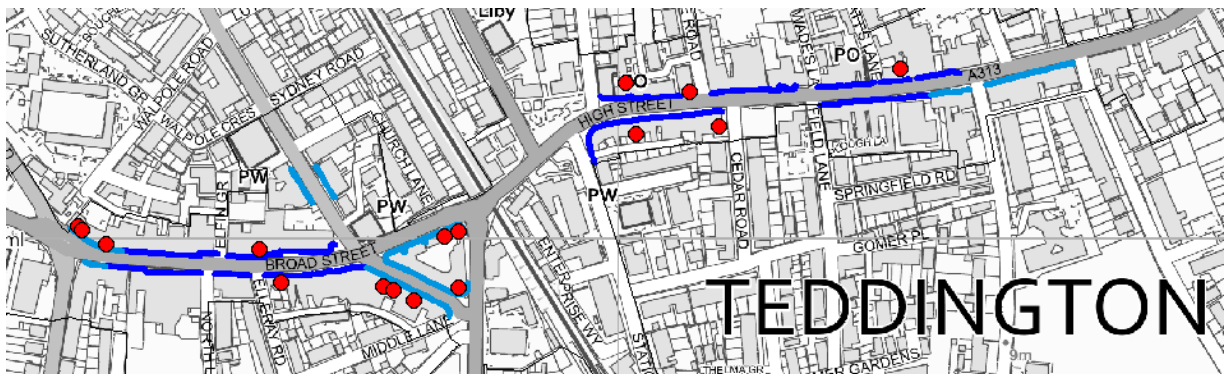
Twickenham

- There were 28 vacancies in Twickenham Town Centre of which 5 were newly vacant shops, 2 newly vacant cafes, 1 newly vacant bank, and 2 newly vacant restaurants. This compares to a total of 27 vacant units in 2019.
- 9 vacant shops remained unoccupied from 2019.
- 4 units on Church Street remained vacant following the 2019 survey.
- 8 units on Heath Road, included 2 newly vacant units and 1 redevelopment site
- 7 vacant units on King Street included 4 newly vacant shops and a bank
- The remaining vacant units included a sandwich shop and café on London Road, and a butcher on York Street



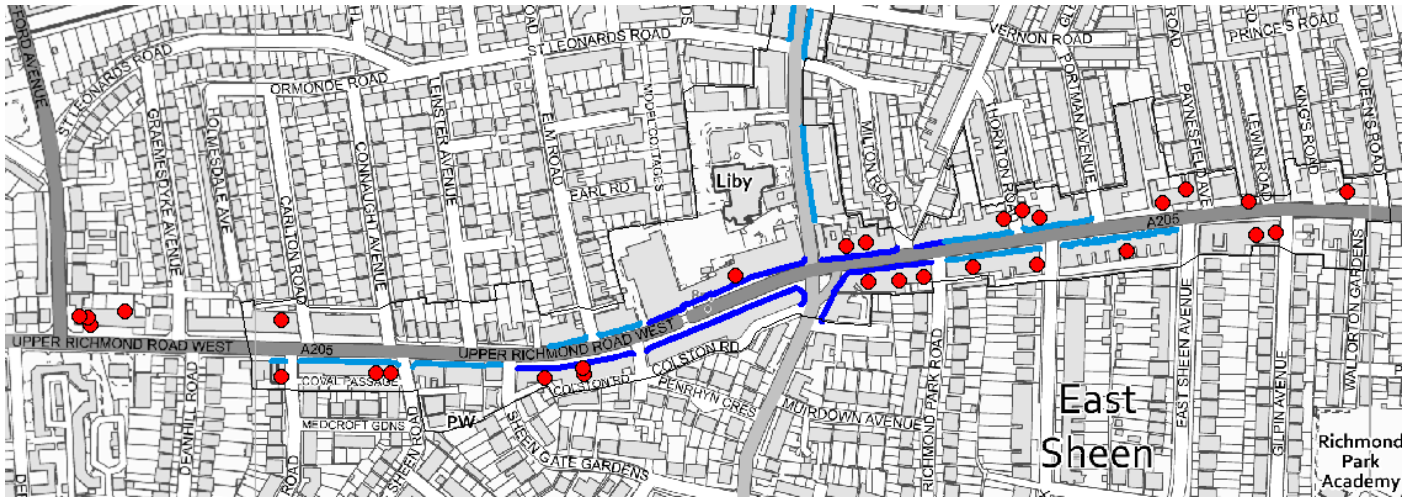
Teddington

- Teddington had 16 vacant units compared to 10 recorded in 2019.
- This included 7 newly vacant shop units, 3 closed café units and 4 units that have remained vacant since 2019.
- 7 vacant units were on Broad Street, including 4 newly vacant shops.
- 5 vacant units were on High Street, including 2 newly vacant shops and 1 newly closed café.
- 4 vacant units at The Causeway included a kitchen showroom, café and 2 vacant office units.
- There has been an increase in vacancies in the secondary shopping frontages, however the key shopping frontage remains at the same level as in 2019.



East Sheen

- East Sheen had 29 vacant units compared with 27 recorded in 2019.
- 7 newly vacant shops included a clothes shop, furniture and bathroom showrooms and a chemist.
- 18 units remained unoccupied since the 2019 survey.
- All vacant units were on Upper Richmond Road West, and there were no vacant units on Sheen Lane
- 9 vacant units were located in Key frontages, 8 in secondary frontages and 12 in non-designated frontages.



Whitton

- There were 7 vacant units in Whitton compared to 9 vacancies in 2019 within the main centre boundary¹⁴.
- 6 of these units remained unoccupied since the 2019 survey, and there was 1 newly vacant hairdresser
- Whitton is the only town centre where the number of vacancies has decreased between 2019 and 2020. This might reflect a smaller number of multiple retailers being represented in the centre. Whitton is the smallest of town centres in terms of numbers of units and floorspace.



¹⁴ Figures presented in the tables for Whitton includes a small group of shops on Hounslow Road

13. Local centre vacancy rates

Vacancy rates in **key frontages** in the local centres have increased by 3% overall to 8.1%, when compared to 2019, with significant increases in East Twickenham and Hampton Hill. (Tables 8 & 9) The total number of vacant units in Hampton Hill included a row of 4 shops which have since become a development site for new residential and retail units. Barnes and Kew Gardens saw a smaller increase and Hampton Village, Ham Parade and St. Margarets remained at the same level of vacancy rates as 2019.

Vacancy rates in **secondary frontages** in the local centres saw similar results with a vacancy rate of 8.5%. Barnes and Ham Parade saw the largest increases.

Vacancy rates in **all designated frontages** also saw a 3% increase compared to 2019.

The vacancy rate in **all frontages** in local centres has increased by 1.4% to 9% with increases in Barnes, East Twickenham, Hampton Hill, Ham Parade and Kew Gardens. (Table 4) However due to the smaller number of units in the local centres, increases in vacant units ranged from 1 to 3 units. East Twickenham saw an increase of 3 vacant units compared to 2019, Hampton Hill and Barnes increased by 2 vacant units, and Barnes and Kew Gardens saw an increase of 1 vacant unit. St. Margarets remained the same as 2019, whilst Hampton Village saw a decrease of 1 unit.

14. Neighbourhood Centre vacancy rates

Vacancy Rates in **key frontages** in neighbourhood centres have decreased in contrast to the local centre increases. Only Hampton Wick saw an increased vacancy rate. 5 neighbourhood centres saw a fall in vacancy rates, and 3 remained at the same level as in 2019.

The vacancy rate in **all frontages** in the neighbourhood centres has decreased since 2019 from an average of 8% to 5.3%. All other areas saw a decrease in vacancies, apart from Hampton Wick which saw an increase from 3 to 5 vacant units. The total number of vacant units decreased from 25 in 2019, to 17 in 2020, which is comparable to the number of vacancies seen in 2016 and 2017.

15. Local parades vacancy rates

Local Parades have also seen decreased vacancy rates, with the number of vacant units similar to the number of vacancies seen in 2016 and 2017.

Only Ashburnham Road and Lower Mortlake Road saw increases in key shopping frontages, and Sandycombe Road saw an increase in secondary shopping frontages. Lower Mortlake Road saw the largest increase of 3 vacant units, which included a former Butcher, Newsagent and Betting Shop. Whitton Road and Twickenham Green had the largest decrease in vacant units.

Table 8: Vacancy Rates in Local, Neighbourhood Centres and Local Parades (designated frontages)

	key shopping frontage							secondary shopping frontage							all designated frontage							
	2012	2014	2015	2016	2017	2019	2020	2010	2012	2014	2015	2016	2017	2019	2020	2012	2014	2015	2016	2017	2019	2020
Local centres																						
Barnes	6.5	3.9	1.3	2.6	8.0	5.3	6.6	3.6	11.1	3.8	3.7	0	11.5	3.8	11.5	7.7	3.9	2	2	8.9	4.9	7.8
East Twickenham	5.3	10.5	21.1	11.1	0	0	17.6	13.2	9.4	9.4	17.3	0	5.7	5.7	5.7	8.3	9.7	18.3	2.9	4.2	4.3	8.6
Hampton Hill	3.6	3.4	0	0	3.4	17.2	24.1	4.3	4.3	6.3	8.5	2.1	4.3	6.5	10.4	4	5.2	5.3	1.3	3.9	10.7	15.6
Hampton Village	7.1	0	3.6	3.7	3.7	7.1	7.1	19	5.6	5.6	5.6	0	0	5	0	6.5	2.2	4.3	2.2	2.1	6.3	4.2
Ham Parade	0	6.7	6.7	6.7	6.7	0	0	0	0	0	25	0	0	0	25	0	5.9	8.8	5.9	5.9	0	2.9
Kew Gardens	4	4	8	4.2	0	0	4.2	6.3	6.3	6.3	6.3	6.3	0	6	6	4.9	4.9	7.3	5	0	3	5
St Margarets	3.2	3.2	6.5	0	0	3.2	3.2	6.3	6.3	6.3	3.1	9.4	18.8	12.1	12.1	4.8	4.8	4.8	4.8	9.5	7.8	7.8
Average	4.6	4.2	5.1	3.4	4.3	5.1	8.1	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	8.3
Neighbourhood centres																						
Castelnau	8.7	8.7	13	0	0	9	0	-	-	-	-	-	-	-	-	8.7	8.7	13	0	0	9	0
Friars Stile Road*	0	0	17.6	6.3	0	6	0	50	-	-	-	-	-	-	-	0	0	17.6	6.3	0	6	0
Hampton Wick*	0	12.5	12.5	25	12.5	0	12.5	-	-	-	-	-	-	-	-	0	12.5	12.5	25	12.5	0	12.5
Heathside	13.3	0	0	0	0	20	13.3	0	0	0	0	7.7	0	8	7	7.1	0	0	3.6	0	14	10.3
Sheen Road	11.1	0	0	11.1	0	11	11	0	25	0	0	0	0	0	0	17.6	0	0	6.3	0	6	6
Kingston Road	6.7	6.7	13.3	6.7	6.7	6.7	6.7	16.7	16.7	0	50	0	16.7	0	0	9.5	4.8	23.8	5.6	9.5	4.8	4.8
Stanley Road	4.8	0	4.8	0	4.8	0	0	14.3	13.3	13.3	13.3	6.7	6.7	12.5	0	8.3	5.6	8.3	2.8	5.6	5.4	0
White Hart Lane	4.5	9.1	13.6	4.8	9.5	13	8.7	9.5	9.5	4.8	4.8	4.8	9.5	4.8	4.8	7	7	9.3	4.8	9.5	9.1	6.8
Average	6.2	4.7	10	4.7	3.9	8.4	5.3	10.8	11.3	4.8	9.7	5.1	6.3	6.3	3.1	7.9	4.7	9.9	4.8	4.7	7.7	4.6
Local parades																						
Ashburnham Road	0	0	0	0	0	13	25	-	-	-	-	-	-	-	-	0	0	0	0	0	12.5	25
Fulwell	11.1	0	0	11.1	0	22	11	-	-	-	-	-	-	-	-	11.1	0	0	11.1	0	22	11.1
Ham Street / Back Lane	7.7	9.1	23.1	15.4	23.1	30.8	15.4	40	25	0	0	0	0	0	0	11.8	6.7	17.6	11.8	17.6	23.5	11.8
Hampton Nursery Lands	0	0	0	0	0	25	25	-	-	-	-	-	-	-	-	0	0	0	0	0	25	25
Hospital Bridge Road	0	0	0	0	0	0	0	-	-	-	-	-	-	-	-	0	0	0	0	0	0	0
Kew Green	12.5	12.5	12.5	12.5	25	0	0	-	-	-	-	-	-	-	-	12.5	12.5	12.5	12.5	25.0	0	0
Kew Road	-	-	-	-	-	-	-	3.6	7.1	3.4	0	3.4	3.4	10.3	0	7.1	3.4	0	3.4	3.4	10.3	3.4
Lower Mortlake Road	9.1	0	0	0	0	0	27.3	0	0	0	0	0	0	0	0	8.3	0	0	0	0	0	25
Nelson Road	27.3	18.2	9.1	18.2	18.2	27.3	0	-	-	-	-	-	-	-	-	27.3	18.2	9.1	18.2	18.2	27.3	9.1
Sandycombe Road**	0	0	0	0	0	17	0	16.7	0	0	0	0	16.7	0	33.3	0	0	0	0	8.3	16.7	16.7
Strawberry Hill	7.1	14.3	0	0	0	0	0	-	-	-	-	-	-	-	-	7.1	14.3	0	0	12.5	25.0	0
Twickenham Green	27.8	22.2	16.7	11.1	0	6	0	-	-	-	-	-	-	-	-	27.8	22.2	16.7	11.1	0	0	0
Waldegrave Road	10	20	10	10	20	20	10	0	0	0	0	0	0	0	0	7.1	14.3	7.1	7.1	0	6	6
St Margarets Road*	-	-	-	-	-	-	-	25	25	25	25	12.5	12.5	25	12.5	25	25	25	12.5	14.3	14.3	7.1
Whitton Road	0	0	0	0	0	0	0	-	-	-	-	-	-	-	-	0	0	0	0	0	0	0
Average	11.2	9.8	7.3	7.2	7.3	12.2	7.4	11.5	9.6	5.8	3.8	3.8	5.8	11.5	5.8	10.7	8.6	6.3	6.3	6.9	12.0	5.7

Table 9: Vacancy Rates in Local, Neighbourhood Centres and Local Parades (all frontages)

	centre vacancy rate (all frontages)								number of vacant units				
	2012	2013	2014	2015	2016	2017	2019	2020	2015	2016	2017	2019	2020
Local centres													
Barnes	6.3	4.7	4	2.4	2.4	8.6	7.0	8.6	3	3	11	9	11
East Twickenham	7.8	6.5	9.1	17.1	2.7	3.9	5.3	9.3	13	2	3	4	7
Hampton Hill	7	6.2	10.6	11.4	6.2	12.9	13.6	14.9	15	8	17	18	20
Hampton Village	5.1	2.6	2.5	5.1	2.5	1.3	7.4	6.2	4	2	1	6	5
Ham Parade	2.4	2.4	7	7	7	9.3	0	2.3	3	3	4	0	1
Kew Gardens Station	3.8	3.9	3.9	5.9	4.1	2.0	2.1	4.1	3	2	1	1	2
St Margarets	4.5	6	4.5	4.5	4.4	8.8	8.7	8.7	3	3	6	6	6
Average/total	5.7	4.9	6.3	7.7	4	7.5	7.6	9.0	44	23	43	44	52
Neighbourhood centres													
Castelnau	8.3	12.5	8.3	12.5	0	0.0	8.0	0	3	0	0	2	0
Friars Stile Road	9.5	14.3	5	14.3	5.3	4.8	4.8	0	3	1	1	1	0
Hampton Wick	23.6	22.2	20.7	29.8	11.1	6.9	5.1	8.1	17	5	4	3	5
Heathside	6.1	9.1	0	0	3	0	15.2	11.8	0	1	0	5	4
Sheen Road	11.9	4.9	4.7	4.9	6.5	4.3	8.7	4.3	2	3	2	4	2
Kingston Road	9.5	0	4.8	23.8	5.6	9.5	4.8	4.8	5	1	2	1	1
Stanley Road	6.7	8.9	4.4	6.7	4.4	6.7	8.7	2.2	3	2	3	4	1
White Hart Lane	8.5	8.3	8.3	13.3	5.4	8.3	8.1	6.3	8	3	5	5	4
Average/total	11.4	10.7	8.2	13.6	5.6	5.5	8.0	5.3	41	16	17	25	17
Local parades													
Ashburnham Road	0	0	0	0	0	0	0.0	25	0	0	0	0	2
Fulwell	16.7	0	0	0	8.3	0	16.7	8.3	0	1	0	2	1
Ham Street / Back Lane	11.1	5.6	6.3	16.7	11.1	16.7	22.2	11.1	3	2	3	4	2
Hampton Nursery Lands	0	0	0	0	0	0	9.1	8.3	0	0	0	1	1
Hospital Bridge Road	0	0	0	0	0	0	0	0	0	0	0	0	0
Kew Green	11.1	11.1	5.3	5.3	5.3	15.8	0	5.3	1	1	3	0	1
Kew Road	8.8	5.7	2.9	0	2.9	2.9	8.6	2.9	0	1	1	3	1
Lower Mortlake Road	5.9	0	0	0	0	4.5	0	13.6	0	0	1	0	3
Nelson Road	27.3	27.3	18.2	9.1	18.2	18.2	27.3	9.1	1	2	2	3	1
Sandycombe Road**	7	4.7	7	4.7	5.1	7.7	10.3	10.3	2	2	3	4	4
Strawberry Hill	7.1	14.3	14.3	0	0	0	0	0	0	0	0	0	0
Twickenham Green	16.7	14.3	23.8	14.3	11.4	4.5	9.1	4.5	6	5	2	4	2
Waldegrave Road	13.3	13.3	13.3	6.7	6.7	13.3	13.3	6.7	1	1	2	2	1
St Margarets Road*	27.3	27.3	27.3	18.2	9.1	9.1	18.2	7.1	2	1	1	2	1
Whitton Road	6.7	6.7	0	6.7	28.6	26.7	33.3	13.3	1	4	4	5	2
Average/total	10.9	8.7	9	6.1	7.1	7.9	10.8	7.9	17	20	22	30	22

16. Appendix: List of Vacant and Closed Units in Main Town Centres

East Sheen

LDF Frontage	Address	2019 Survey	2019 Use Class	2020 Survey
05/Key	240 - 242 Upper Richmond Road West East Sheen London SW14 8AG	Sugar	A1	Vacant
05/Key	427A Upper Richmond Road West East Sheen London SW14 7PJ	Vacant	VA1	Vacant
05/Key	427 Upper Richmond Road West East Sheen London SW14 7PJ	Vacant	VA1	Vacant
05/Key	274A - 276 Upper Richmond Road West East Sheen London SW14 7JE	Vacant	VA1	Vacant
05/Key	437 - 439 Upper Richmond Road West East Sheen London SW14 7PJ	Vacant	VA1	Vacant
05/Key	341 Upper Richmond Road West East Sheen London SW14 8QN	Vacant	VA2	Under Construction
05/Key	357 - 359 Upper Richmond Road West East Sheen London SW14 8QN	Vacant	VA2	Vacant
05/Key	347 Upper Richmond Road West East Sheen London SW14 8RH	Vacant	VA2	Vacant
05/Key	246 Upper Richmond Road West East Sheen London SW14 8AG	Vacant	VSG	Vacant
05/N	168 Upper Richmond Road West East Sheen London SW14 8AW	Bernadout	A1	Vacant
05/N	195 Upper Richmond Road West East Sheen London SW14 8QT	Bathroom +	A1	Vacant
05/N	410 - 414 Upper Richmond Road West East Sheen London SW14 7JX	Bathstore	A1	Vacant
05/N	191 Upper Richmond Road West East Sheen London SW14 8QT	Octavia Foundation	A1	Closed
05/N	138 Upper Richmond Road West East Sheen London SW14 8DS	Carols Place	A3	Closed
05/N	202A - 202B Upper Richmond Road West East Sheen London SW14 8AW	Vacant	VA1	Vacant
05/N	160 Upper Richmond Road West East Sheen London SW14 8AW	Vacant	VA5	Vacant
05/N	422 Upper Richmond Road West East Sheen London SW14 7JX	Vacant	VB1	Vacant
05/N	368B Upper Richmond Road West East Sheen London SW14 7JU	Vacant	VD1	Vacant
05/N	146 Upper Richmond Road West East Sheen London	Storage?	VSG	Vacant
05/N	422 Upper Richmond Road West East Sheen London SW14 7JX	Vacant	VSG	Vacant
05/N	424 Upper Richmond Road West East Sheen London SW14 7JX	Vacant	VSG	Vacant
05/Sec	257 Upper Richmond Road West East Sheen London SW14 8QS	Round the Clock Pharmacy	A1	Vacant
05/Sec	198 Upper Richmond Road West East Sheen London SW14 8AN	Nom de Plume	A1	Vacant
05/Sec	331 Upper Richmond Road West East Sheen London SW14 8QR	Lotus Palace	A3	Closed
05/Sec	467 - 469 Upper Richmond Road West East Sheen London SW14 7PU	Oliveira	A3	Closed
05/Sec	311 Upper Richmond Road West East Sheen London SW14 8QR	Sheen Tyre Service	SG	Refurb
05/Sec	463 Upper Richmond Road West East Sheen London SW14 7PU	Vacant	VA1	Vacant
05/Sec	204 Upper Richmond Road West East Sheen London SW14 8AH	Vacant	VA2	Vacant
05/Sec	499 Upper Richmond Road West East Sheen London SW14 7DE	Vacant	VB1	Vacant

Richmond

LDF Frontage	Address	2019 Survey	2019 Use Class	2020 Survey
01/Key	Wickham House 14 King Street Richmond	Vacant	VB1	Vacant
01/Key	16 - 18 The Quadrant Richmond TW9 1BP	Halifax	A2	Vacant
01/Key	13 Sheen Road Richmond TW9 1AD	Vacant	VA1/A3	Vacant
01/Key	Vision Express 23 - 24 George Street Richmond TW9 1HY	Vision Express	A1	Vacant
01/Key	9-10 George Street Richmond TW9 1JY	Bella	A1	Vacant
01/Key	5 George Street Richmond TW9 1JY	Vacant	VA1	Vacant
01/Key	3 George Street Richmond TW9 1JY	Jo Malone	A1	Vacant
01/Key	57 - 58 George Street Richmond TW9 1HE	Smiggle	A1	Vacant
01/Key	54 George Street Richmond TW9 1HJ	Top Shop / Top Man	A1	Vacant
01/Key	53 George Street Richmond TW9 1HJ	Carphone Warehouse	A1	Vacant
01/Key	48 George Street Richmond TW9 1HJ	TM Lewin	A1	Vacant
01/Key	44-45 George Street Richmond TW9 1HJ	Massimo Dutti	A1	Vacant
01/Key	3 Church Court Richmond TW9 1JL	Glow	A1	Vacant
01/Key	15 Hill Street Richmond TW9 1SX	Vacant	VA1	Vacant
01/Key	13 Hill Street Richmond TW9 1SX	Vacant	VA1	Vacant
01/Key	18 Hill Street Richmond TW9 1TN	Boutique by Shelter	A1	Vacant
01/Key	84 Hill Rise Richmond TW10 6UB	Vacant	VA3	Vacant
01/Key	82 Hill Rise Richmond TW10 6UB	Vacant	VA1	Vacant
01/Key	8 Hill Rise Richmond TW10 6UA	Vacant	VA4	Vacant
01/Key	38 The Quadrant Richmond TW9 1DN	Flight Centre	A1	Closed
01/Key	39 The Quadrant Richmond TW9 1DN	Flight Centre	A1	Closed
01/Key	12 Lichfield Terrace Sheen Road Richmond TW9 1AS	Digs and Dash	SG	Closed
01/Key	2 The Square Richmond TW9 1DY	Aveda	A1	Closed
01/Key	74 Hill Street Richmond	Costa	A1	Closed
01/Key	1 Paved Court Richmond TW9 1LZ	Toast	A1	Refurb
01/N	6 Red Lion Street Richmond TW9 1RW	Odeon Studio	D2	Closed
01/Sec	51 Kew Road Richmond TW9 2NQ	Vacant	VA5	Vacant
01/Sec	1 Quadrant House The Quadrant Richmond TW9 1DJ	VPZ	N/A	Vacant
01/Sec	Oriel House 26 The Quadrant Richmond TW9 1DL	Vacant	VA2	Vacant
01/Sec	27A The Quadrant Richmond TW9 1DN	Foxtons	A2	Vacant
01/Sec	19 Sheen Road Richmond TW9 1AD	Vacant	VA2	Vacant
01/Sec	12B Eton Street Richmond TW9 1EE	Kall-Kwik	A1	Vacant
01/Sec	13 Hill Rise Richmond TW10 6UQ	Vacant	VA1	Vacant
01/Sec	5 - 7 Hill Rise Richmond TW10 6UQ	Vacant	VA1	Vacant
01/Sec	The Duke 2 - 3 Duke Street Richmond TW9 1HP	The Duke	A4	Closed

Teddington

LDF Frontage	Address	2019 Survey	2019 Use Class	2020 Survey
03/Sec	84 - 86 Broad Street Teddington TW11 8QT	Vacant	VA1	Vacant
03/Key	50 Broad Street Teddington TW11 8QY	Paul Kay	A1	Closed
03/Sec	78 Broad Street Teddington TW11 8QT	Hill Stop	A3	Closed
03/Sec	3 Broad Street Teddington TW11 8QZ	NeatSmith	A1	Vacant
03/Sec	1 Broad Street Teddington TW11 8QZ	Fabric House	A1	Vacant
03/Sec	11 Broad Street Teddington TW11 8QZ	Shooting Star Chase	A1	Closed
03/Key	55 Broad Street Teddington TW11 8QZ	Vacant	VA3	Vacant
03/Key	39 High Street Teddington TW11 8ET	The Card Collection	A1	Vacant
03/Key	23 High Street Teddington TW11 8EX	Vacant	VA2	Vacant
03/Key	18 High Street Teddington TW11 8EW	Jack Brunsdon & Son	A1	Vacant
03/Key	42 High Street Teddington TW11 8ES	Vacant	VA2	Vacant
03/Key	97 High Street Teddington TW11 8HG	Organically	A3	Closed
03/Sec	East Wing Causeway House 13 The Causeway Teddington TW11 0HA	Spaces	B1	Vacant
03/Sec	10 - 12 The Causeway Teddington TW11 0HE	Intoto	A1	Refurb
03/Sec	8 The Causeway Teddington TW11 0HE	Toast	A3	Closed
03/Sec	16-20 The Causeway Teddington TW11 0HE	Offices	B1	Vacant

Twickenham

LDF_Frontage	Address	2019 Survey	2019 Use Class	2020 Survey
02/Key	21 Church Street Twickenham TW1 3NJ	Vacant	VA3	Vacant
02/Key	56 Church Street Twickenham TW1 3NR	Vacant	VA1	Vacant
02/Key	41 Church Street Twickenham TW1 3NS	Vacant	VA1	Vacant
02/Key	32 Church Street Twickenham TW1 3NR	Vacant	VA1	Vacant
02/Key	35 Church Street Twickenham TW1 3NR	Vacant	VSG	Vacant
02/Sec	118 Heath Road Twickenham TW1 4BW	Donna Lucia	A3/A4	Vacant
02/Sec	120 Heath Road Twickenham TW1 4BW	Vacant	VA3	Vacant
02/Sec	64-66 Heath Road Twickenham TW1 4BX	Vacant	VA2	Vacant
02/Sec	138-140 Heath Road Twickenham TW1 4BN	Seldram Supplies	A1	Closed
02/Sec	136 Heath Road Twickenham TW1 4BN	Vacant	VA1	Vacant
02/Sec	149 - 151 Heath Road Twickenham TW1 4BH	Redevelopment Site	UC	Under Construction
02/N	103 - 109 Heath Road Twickenham TW1 4AZ	Vacant	VA1	Vacant
02/Sec	1 Heath Road Twickenham TW1 4AW	Vacant	VD2	Vacant
02/Sec	51 King Street Parade King Street Twickenham TW1 3SG	Dynasty	A1	Closed
02/Key	26 - 30 King Street Twickenham TW1 3SN	Cycle Republic	A1	Vacant
02/Key	44 King Street Twickenham TW1 3SH	Courtyard	A1	Vacant
02/Key	38 King Street Twickenham TW1 3SH	TSB Building Society	A2	Vacant
02/Key	15 King Street Twickenham TW1 3SD	Patisserie Valerie	A1/A3	Vacant
02/Key	11 King Street Twickenham TW1 3SD	Vacant	VA1	Vacant
02/Key	21 King Street Twickenham TW1 3SF	Vacant	VA1/A3	Vacant
02/Key	38 London Road Twickenham TW1 3RR	The Munch Box	A1	Closed
02/Key	7 London Road Twickenham TW1 3SX	Faraluna	A1/A3	Vacant
02/Key	1 London Road Twickenham TW1 3SX	Vacant	VA2	Vacant
02/N	68 Richmond Road Twickenham TW1 3BE	Topolli	A3	Closed
02/N	77 Richmond Road Twickenham	Redevelopment site	UC	Vacant
02/N	1A Water Lane Twickenham TW1 3NP	Vacant	VA1	Vacant
02/N	29 - 31 York Street Twickenham TW1 3JZ	Vacant	VA3/A4	Vacant
02/Key	9 York Street Twickenham TW1 3JZ	The Meat Room	A1	Vacant

Whitton

LDF Frontage	Address	2019 Survey	2019 Use Class	2020 Survey
04/Key	99 High Street Whitton Twickenham TW2 7LD	Vacant	VA1	Vacant
04/Key	87 High Street Whitton Twickenham TW2 7LD	Vacant	VA1	Vacant
04/N	70 Hounslow Road Twickenham TW2 7EX	Vacant	VA1	Vacant
04/Sec	108 High Street Whitton Twickenham TW2 7LN	Vacant	VA1/A3	Vacant
04/Sec	22 - 24 High Street Whitton Twickenham TW2 7LT	Vacant	VSG	Vacant
04/Sec	123 High Street Whitton Twickenham TW2 7LQ	Vacant	VA2	Vacant
04/Sec	109 High Street Whitton Twickenham TW2 7LD	Gloria's	A1	Closed