LONDON BOROUGH OF
RICHMOND UPON THAMES

2021 Town Centre Land Use Survey

Planning

18 March 2022

Local Plan Monitoring Report

2021 Centre Land Use Survey

Richmond upon Thames

March 2022

Contents

1. Summary

1. The town centre land use survey took place between and 6th October and 17th November 2021. Following the introduction of the combined planning use class in 2020, for the purposes of this report premises were classified into six broad retail categories. Vacant units were recorded where a judgement was made that they were not trading on the day of the site survey which was confirmed where possible with additional research.

2. 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.

2. Introduction

1. Surveys of all the Town Centres, Local Centres, and Important Local Parades have been carried out in the Borough of Richmond upon Thames since the late 1990's. 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. They cover approximately 2,500 properties and the last survey was carried out in 2021.

2. The survey is a snapshot record, undertaken by observation in the field and the researcher makes a judgement as to the nature of the occupier on that day. Information is not requested from landlords, but where available status is 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.

3. Structural changes to retailing

1. There are well-documented changes to the retail sector resulting from growth in multichannel retailing, primarily internet shopping, which has resulted in debate about the amount of shopping needed in the High Street. The most recent research[1] suggests that there is combined over-supply of 1,121 m^2 (gross) of retail and food/beverage floorspace and other non-retail services up to 2034. By 2039 there is a global under-supply of 5,031 m^2 gross. Overall, it is forecast that there will be a modest need for floorspace in these sectors in long term, but not from the same uses.

2. This research took account of the Covid-19 pandemic. However, it is difficult to forecast demand for floorspace at this time and it is recognised that the pandemic has 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, perhaps resulting in both challenges and opportunities.

3. It has never been more important 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.

4. 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.

1 https://www.richmond.gov.uk/media/22987/retail_and_leisure_needs_study_phase_1.pdf

4. 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. 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[2]. Some exemptions and limited prior approval process.
Came into force in April 2014	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.
	retail to banks and building societies (deposit-takers) - allows change of use from a shop (A1) to a bank or a building society. No prior approval process and few exemptions.
Came into force in April 2015	change of use from shops (A1) to financial and professional services (A2). There is no prior approval process and no exemptions.
Came into force in April 2017	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 September 2020[3]	extending some temporary permitted development rights; takeaway food operations from restaurants, cafes and drinking establishments, and some emergency development rights. 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.) • **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. * meeting criteria which means that this protection is unlikely to be applicable in this borough Drinking establishments are categorised as sui generis. 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.

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

[2] The Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2016 introduced other changes including launderettes being included in Class M- retail and specified sui generis uses to dwelling houses.
[3] https://www.gov.uk/guidance/ensuring-the-vitality-of-town-centres

5. 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 31st August 2020	Use Class from 1st 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.

Class E more broadly covers uses previously defined in the revoked Classes A1/2/3, B1, D1(a-b) and ‘indoor sport’ from D2(e):[4]

- E(a) Display or retail sale of goods, other than hot food
- E(b) Sale of food and drink for consumption (mostly) on the premises
- E(c) Provision of:
  - E(c)(i) Financial services,
  - E(c)(ii) Professional services (other than health or medical services), or
  - E(c)(iii) Other appropriate services in a commercial, business or service locality
- E(d) Indoor sport, recreation, or fitness (not involving motorised vehicles or firearms)
- E(e) Provision of medical or health services (except the use of premises attached to the residence of the consultant or practitioner)
- E(f) Creche, day nursery or day centre (not including a residential use)
- E(g) Uses which can be carried out in a residential area without detriment to its amenity:
  - E(g)(i) Offices to carry out any operational or administrative functions,
  - E(g)(ii) Research and development of products or processes
  - E(g)(iii) Industrial processes

[4] https://www.planningportal.co.uk/info/200130/common_projects/9/change_of_use

6. Methodology

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[5].

2. 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.

3. 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.

4. The report includes a centre vacancy rate which is the number of vacant premises/outlets as a proportion of the total premises/outlets in the centre.

5. Survey results have historically been reported using the former use class order, however following the amalgamation of use classes in September 2020, this report builds on the methodology used in previous reports of a broader classification of the type of retail use into Convenience, Durables and Service categories. Details of the predominant uses in each Retail Category are described in the table below. The predominant use in some units may be unclear, however this overall classification allows comparison of the structure of overall uses in each area. For example, a Post Office may be categorised as a service retailer if it provides mainly postal services, but as a convenience retailer if it incorporates a majority of floorspace as a newsagent and stationery.

6. These retail categories are used to compare the proportion of each use between centres and within each centre considering the hierarchy of designated frontage. This shows the variation in retail categories within centres, for example the predominance of Durable/Non-food outlets in the Key frontages and more Food and Leisure outlets in the Secondary and other frontages.

7. This approach also allows monitoring of changes within the new E use class, to show the type of business occupying previously vacant premises, and the changing composition of retail categories in different areas of the borough.

[5] http://www.richmond.gov.uk/home/services/planning/planning_policy/local_plan/authority_monitoring_report.htm

7. The Borough's centres

Table 1: Centre hierarchy

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

Hierarchy as set out in the adopted Local Plan LP25.

8. Retail Category Definitions

Table 2: Classification of the type of retail use

Convenience Retailer	Baker & Confectioner Butcher Chemist Convenience Store Cosmetics & Beauty Products Shop Delicatessen Fishmonger Florist	Greengrocer Mini Supermarket Newsagent Off Licence Pet Shop Post Office Sandwich Shop Supermarket
Durable/Non-food	Bookseller Card Carpet Carpets & Flooring Charity Children's & Infants' Wear Clothes Clothes, Crafts, Glass & Gifts Cosmetics & Beauty Products Department Store Discount Store DIY & Home Improvement	Footwear Furniture Haberdashery Homeware Jewellery, Watches & Silver Ladies' Wear & Accessories Mobile Phone Phone / Vape Sports, Camping & Leisure Goods Stationer Telephones & Accessories Toys, Games & Hobbies
Food and Leisure	Bakery/Café Bar and Restaurant Café Fast Food & Take Away Restaurant	Restaurant and Bar Sushi Bar Take Away/Restaurant Wine Bar/Restaurant
Services	Amusement Arcade Barber Beauty Salon Computer Repair Shop Cosmetics & Beauty Products Shop Courier Services Dry Cleaner & Launderette Electrical Repairs Funeral Director Glazier Hair and Beauty Salon Hairdresser Health Clinic Insurance Services Internet Café Launderette	Nail Salon Opticians Pet Grooming Phone Repairs Photo Processing Photography Studio Picture Framing Shop Post Office Print Shop Shoe Repairs & Key Cutting Tailor Tanning Salon Tattoo Parlour Taxi Hire Travel Agent Undertaker
Financial and Business	Accountant Bank & Building Society Betting Shop	Estate Agent Office Solicitor
Public Service/Facilities	Chiropodist Cinema Dentist Doctor's Surgery Education Centre Gymnasium Health Clinic Library	Medical Clinic Osteopath Physiotherapist Place of Worship School Sports & Leisure Facilities Veterinary Practice Yoga Studio

9. Summary of Vacancies

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 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.

2. The total number of vacant units in the borough's high streets and local parades has increased and the vacancy rate is at the highest level seen for some years. The largest increases in vacancy rates have been in the Town Centres, while the neighbourhood centres and local parades have seen a slight rise and there has been a decrease in vacancies in the local centres. Table 3 below shows that the total number of vacancies in **all frontages** has increased by 15 units since 2020 from 205 to 220.

3. The main town centres have seen an increase of 10 units compared to 2020, although this is lower than the increase of almost 20 vacant units between 2019 and 2020. The local centres have seen a slight decrease from 36 to 34 vacant units. The neighbourhood centres and local parades have both increased marginally but are close to the average seen over the past 10 years.

4. Richmond Town Centre saw the largest increase of 8 vacant units, and East Sheen and Whitton saw smaller increases of 3 units. However, Twickenham decreased by 8 units and Teddington decreased by 2 vacant units compared to 2020.

5. At 9% the borough centre vacancy rate in designated frontages[6] has risen from the 2020 rate of 8.2%, however this is smaller than the rise from 7.4% in the previous year. This vacancy rate in designated frontages is now slightly higher than the borough vacancy rate for all frontages, whereas historically vacancy rates have generally been lower in designated frontages.

Table 3: Summary Table: All vacancies

In designated shopping frontages:[1]	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2019**	**2020**	**2021**	**Average**
total number of vacancies	**141**	**127**	**114**	**125**	**91**	**106**	**137**	**155**	**169**	**129**
town centres	82	79	67	65	58	61	76	95	106	77
local centres	25	18	23	30	13	24	25	36	34	25
neighbourhood centres	15	14	9	19	9	9	15	9	12	12
local parades	19	16	15	11	11	12	21	15	17	15
Vacancy rate (%)	7.5	6.8	6.1	6.7	4.9	5.7	7.4	8.2	**9**	6.9

In all frontages:	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2019**	**2020**	**2021**	**Average**
Total number of vacancies	195	183	168	186	133	163	200	205	220	184
Vacancy rate (%)	8.1	7.6	6.9	7.7	5.5	6.6	8.1	8.4	8.9	7.5

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

10. 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 2020 with 219 vacant units, compared to 205 in 2020. This follows the previous 2 years when the vacancy rate was above 8%. The number of vacant units were significantly lower in 2017 and 2016. The overall vacancy rate in all frontages has increased by 0.5% from to 8.4% in 2020 to 8.9% in 2021.

- At 8.9% the borough centre vacancy rate in designated frontages[7] continues to be low and remains well below the national average of around 14%.[8]

Boroughwide Centre Vacancy Rate (All designated frontages)

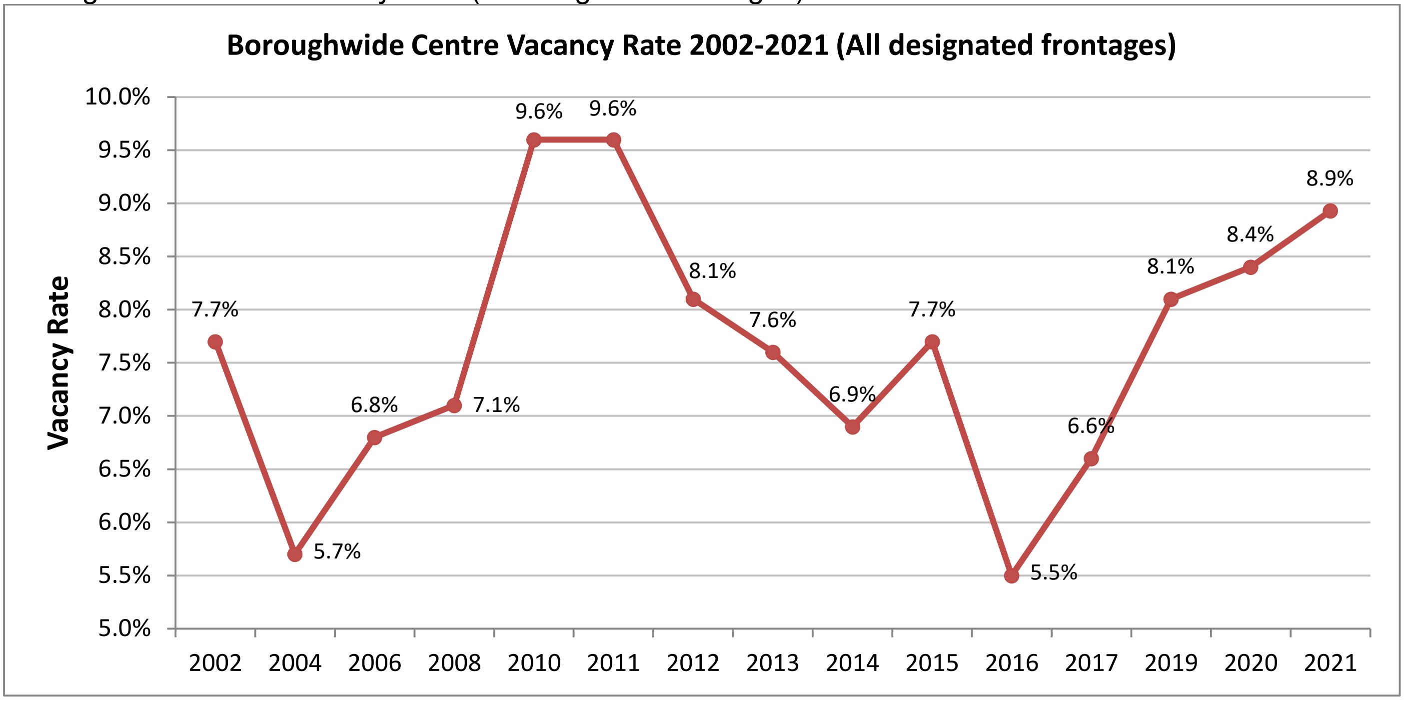


Table 4: Boroughwide Centre Vacancy Rate (All designated frontages)

Year	2002	2004	2006	2008	2010	2011	2012	2013	2014	2015	2016	2017	2019	2020	2021
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%	8.1%	8.4%	9%

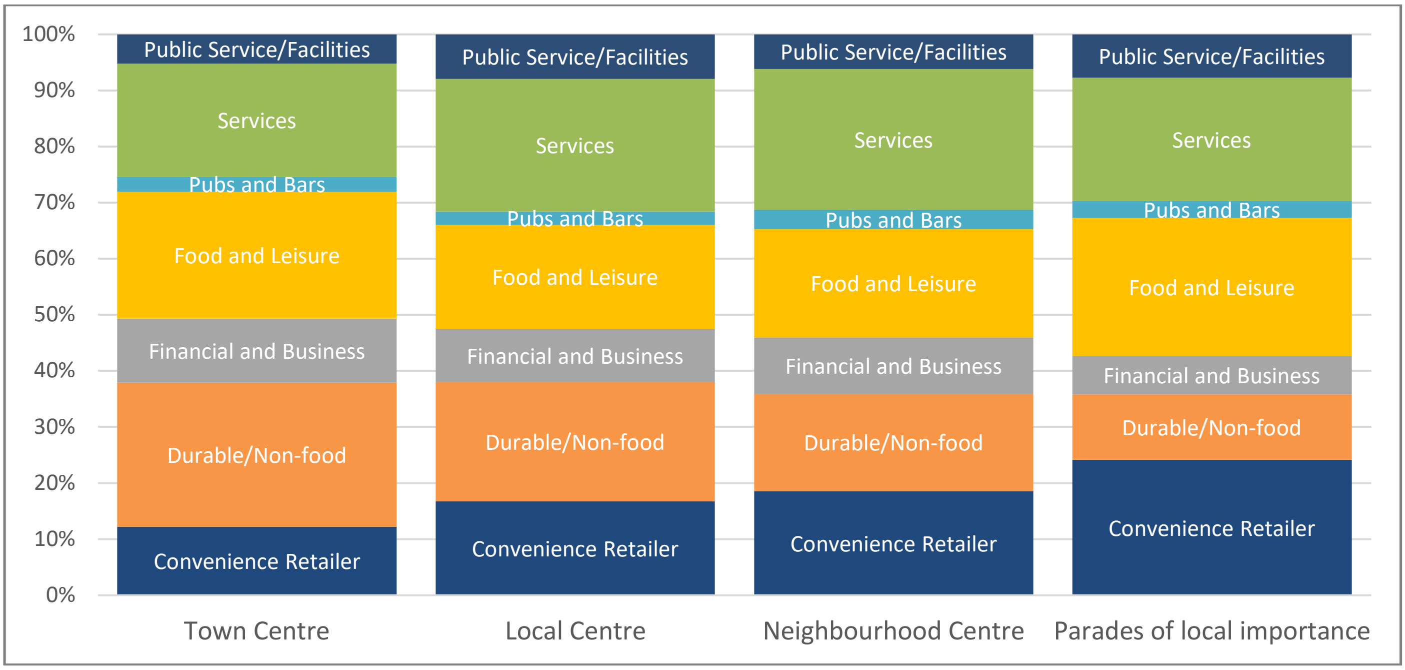
[7] Designated frontages as classified in the Local Plan adopted 2018. See Appendix 4 and Policies Map.
[8] https://brc.org.uk/news/corporate-affairs/glimmer-of-hope-for-vacancy-rate/

11. Retail Categories by Frontage

The table and chart below show the percentage of all units in the retail categories that are in the hierarchy of centres in the borough. These show for example, that the majority Durable/Non-food outlets are generally in Town Centres and the majority of Convenience Retailers are in the Neighbourhood Centres and Parades.

Table 5: Percentage of trading units in centres and parades by retail category

	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Town Centres	12%	20%	26%	11%	23%	3%	5%
Local Centres	17%	24%	21%	10%	18%	2%	8%
Neighbourhood Centres	19%	25%	17%	10%	19%	3%	6%
Parades of local importance	24%	22%	12%	7%	25%	3%	8%



12. Town Centre Vacancy Rates

The overall vacancy rate for **all frontages** in the borough's five town centres in 2021 is 9.4%, a small increase on the 9% recorded in 2020. There has been a year on year rise since 2016, when a 5.8% vacancy rate was recorded, although the rate of increase has slowed from the 1.5% increases in 2019 and 2020. Numbers of vacant units have risen by 3 units to 119 across the five centres.

The vacancy rate in all frontages in the 5 town centres has increased slightly to 9.4% in 2021. The greatest rise of 2.4% was in Richmond, and East Sheen and Whitton also saw an increase in vacancy rates. There was a significant decrease of 2.8% in Twickenham resulting in a rate below the 2014 – 2021 average. Teddington also saw a decrease of 1%, although this is still above average for the town centre.

- 105 units in **all designated frontages** in the five town[9] centres were vacant in 2021, which is a vacancy rate of 9.7%. This is compared to 8.8% in 2020, 7.1% in 2019 and 5.7% of units in 2017.
- Vacancy rates in **key shopping frontages** are slightly lower with 9.2% of units vacant, compared with 9.5% in 2020 and 7.4% recorded in 2019.
- The town centre vacancy rate in **all frontages** is lower than in designated frontages and has increased slightly to 9.4%, from 9.0% in 2020 and 7.5% in 2019.

Town Centre Vacancy Rate (All frontages)

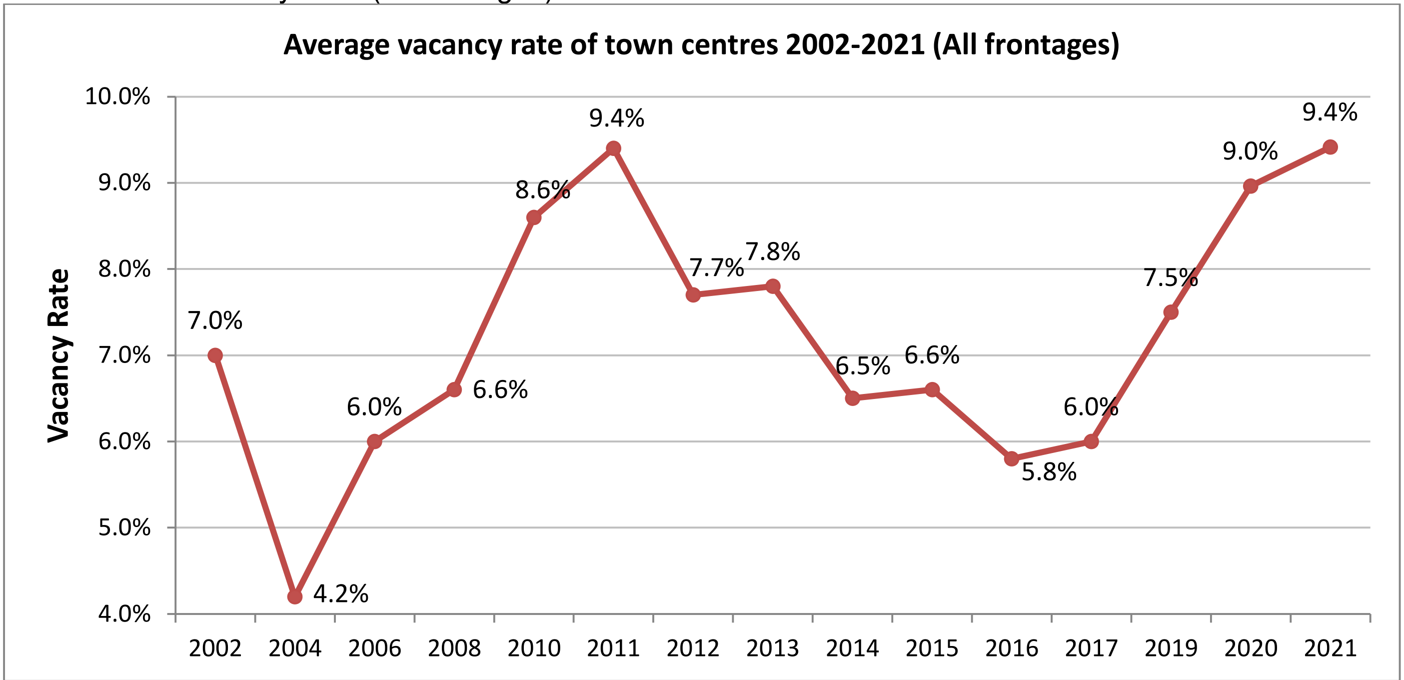


Table 6: Town Centre Vacancy Rate (All frontages)

Year	2002	2004	2006	2008	2010	2011	2012	2013	2014	2015	2016	2017	2019	2020	2021
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%	9.4%

Table 7: Town Centre Vacancy Rate (All frontages)

	2014	2015	2016	2017	2019	2020	2021	Average
Richmond	6.5	7.3	5.3	4.7	6.7	9.7	12.1	7.5
East Sheen	5.9	4.8	6.2	7.6	9.3	9.9	11.4	7.9
Teddington	2.6	3.6	7.7	7.2	4.6	8.2	7.2	5.9
Twickenham	9.4	8.4	5.7	5.7	9.1	9.4	6.6	7.8
Whitton	6.7	9	3.8	5.2	6.6	5.2	7.4	6.2
Total	**6.5**	**6.6**	**5.8**	**6.0**	**7.5**	**9.0**	**9.4%**	**7.3%**

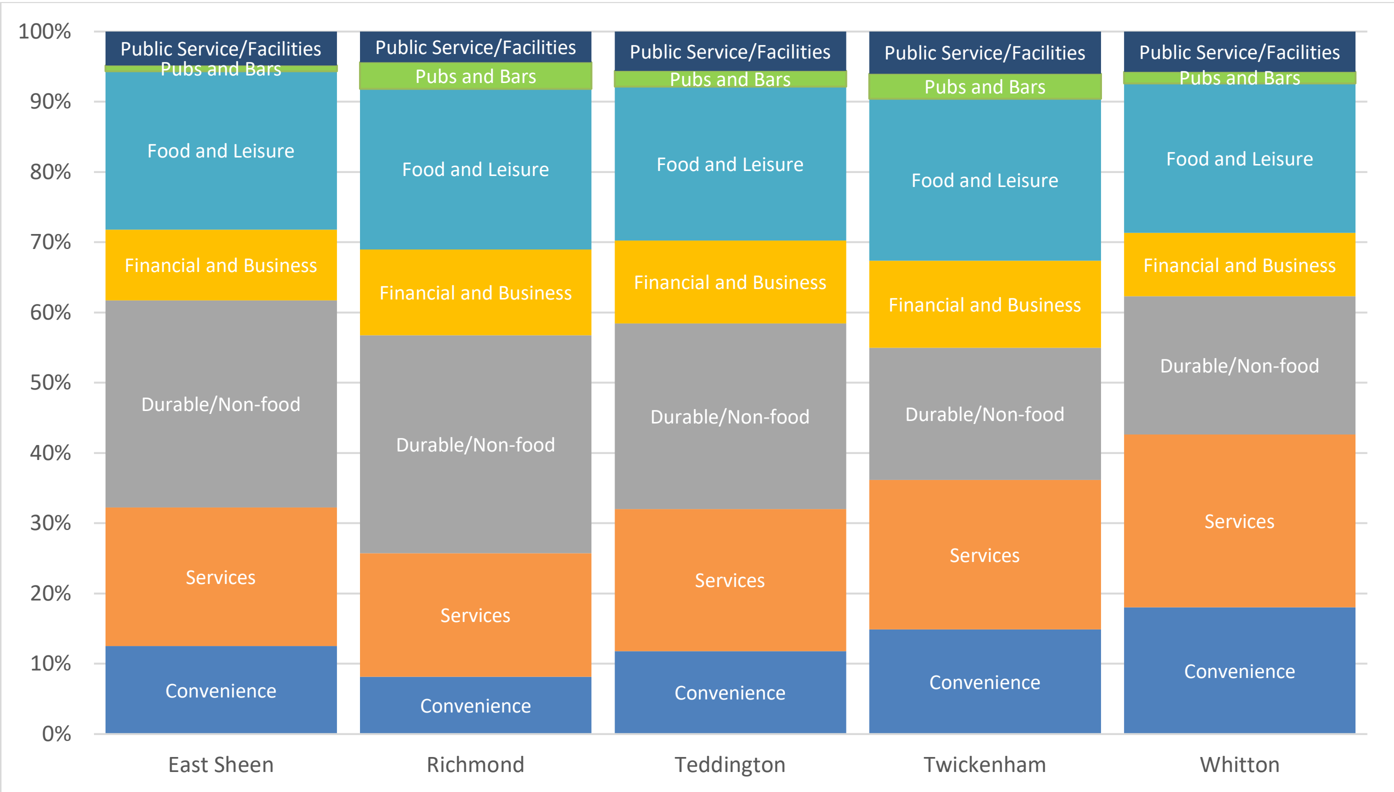
[9] Town centres are synonymous with main centres as defined in the adopted Local Plan

13. Town Centre Retail Categories

The table and chart below show the percentage of all units in the retail categories that are in each Town Centre as a proportion of that category. This allows comparison of the categories between Town Centres, and shows for example, that Richmond and East Sheen have a high proportion of Durable / Non-food units compared to other Town Centres and Whitton a large number of Convenience Retailers and Services. The differences in structure of uses in each Town Centre illustrates the market forces, character, and demographic of each area.

Table 8: Percentage of trading units in Town Centres by retail category

Town Centre	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
East Sheen	13%	20%	29%	10%	23%	1%	5%
Richmond	8%	18%	31%	12%	23%	4%	4%
Teddington	12%	20%	26%	12%	22%	2%	6%
Twickenham	15%	21%	19%	12%	23%	4%	6%
Whitton	18%	25%	20%	9%	21%	2%	6%
Grand Total	12%	20%	26%	11%	23%	3%	5%



14. Main Town Centre vacancy rates

Table 9: Vacancy rates in 5 main town centres (designated frontages)

	key shopping frontage							secondary shopping frontage							all designated frontage						
	2014	2015	2016	2017	2019	2020	2021	2014	2015	2016	2017	2019	2020	2021	2014	2015	2016	2017	2019	2020	2021
Richmond	6	7.7	4.7	4.3	4.8	10.8	**10.4**	6.9	5.9	7.1	5.9	9.8	8.6	**17.8**	6.3	7.2	5.5	4.8	6.3	10.1	**12.7**
East Sheen	5.3	2.6	3.9	6.6	14.7	11.8	**15.6**	6.8	3.8	6	9	5.2	6	**7.5**	6.2	3.3	5.3	8.1	8.6	8.1	**10.5**
Teddington	3.4	3.4	7.7	4.3	6	6	**7**	1.7	3.3	6.7	6.7	5.1	15.3	**10.2**	2.8	3.4	7.3	5.1	5.7	9.1	**8**
Twickenham	9.2	7.6	4.6	6.2	8.5	11.4	**7.5**	7.9	7	6.1	3.5	7.8	7	**7.8**	8.6	7.3	5.3	4.9	8.2	9.3	**7.6**
Whitton	7.1	8.8	1.8	7	8.6	3.6	**5.2**	6	10.2	4.2	6.1	6	8	**10**	6.6	9.4	2.9	6.6	7.4	5.7	**7.4**
Average	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	**10.5**	6.3	6.1	5.4	5.7	7.2	8.9	**8.9**

Table 10: Vacancy rates in 5 main town centres (all frontages)

	centre vacancy rate (all frontages)								number of vacant units					
	2012	2014	2015	2016	2017	2019	2020	2021	2015	2016	2017	2019	2020	2021
Richmond	8.3	6.5	7.3	5.3	4.7	6.7	9.7	**12.1**	26	19	17	24	35	**44**
East Sheen	6.5	5.9	4.8	6.2	7.6	9.3	9.9	**11.4**	14	18	22	27	29	**33**
Teddington	5.2	2.6	3.6	7.7	7.2	4.6	8.2	**7.2**	7	15	14	9	16	**14**
Twickenham	8.7	9.4	8.4	5.7	5.7	9.1	9.4	**6.6**	25	17	17	27	28	**20**
Whitton	10.4	6.7	9	3.8	5.2	6.6	5.2	**7.4**	12	5	7	9	7	**10**
Average/total	7.7	6.5	6.6	5.8	6	7.5	9	**9.3**	84	74	77	96	115	**121**

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.

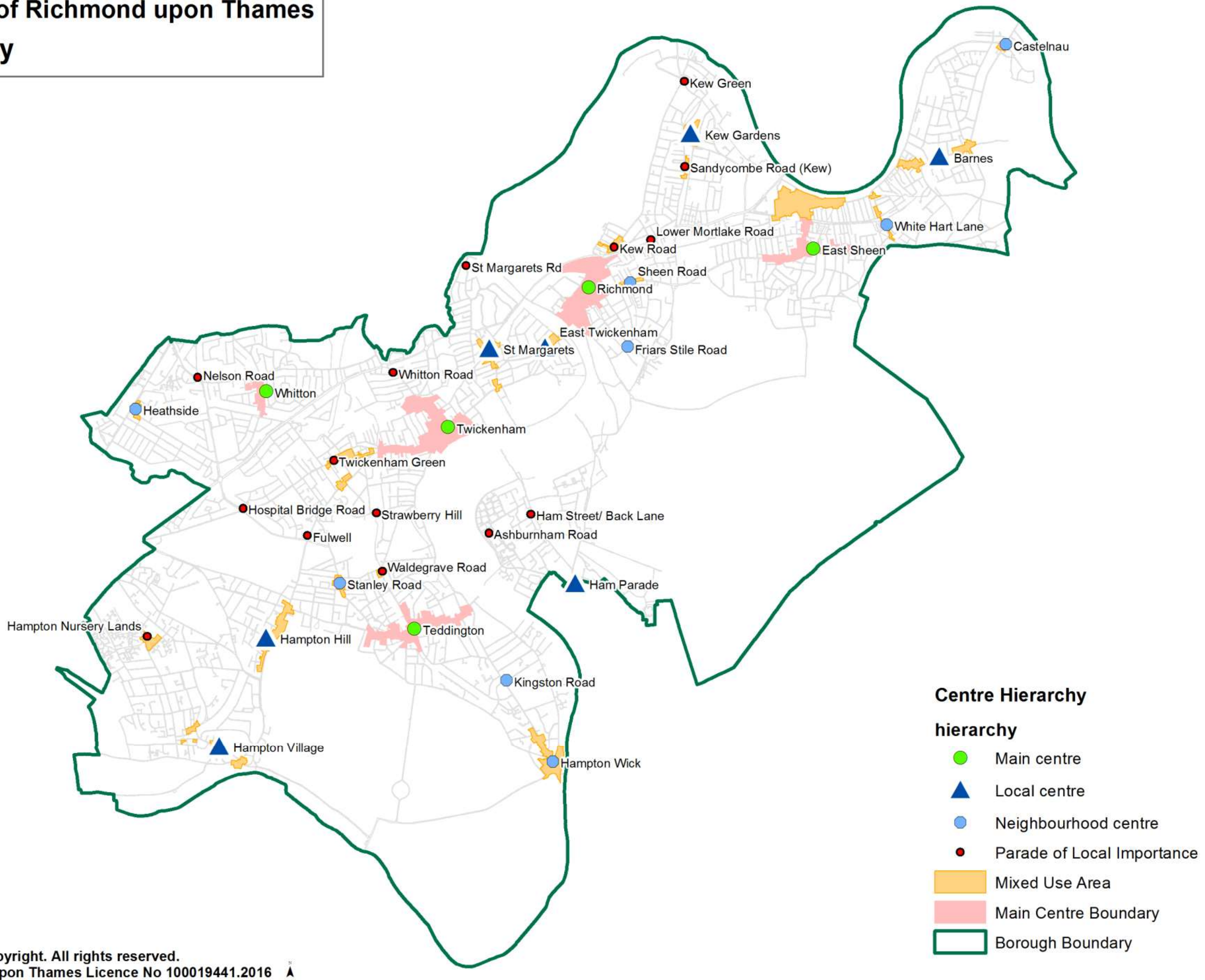
Table 11: Vacancy Rates in Local, Neighbourhood Centres and Local Parades (designated frontages)

	key shopping frontage							secondary shopping frontage							all designated frontage						
	2014	2015	2016	2017	2019	2020	2021	2014	2015	2016	2017	2019	2020	2021	2014	2015	2016	2017	2019	2020	2021
Local centres																					
Barnes	3.9	1.3	2.6	8.0	5.3	6.6	7.9	3.8	3.7	0	11.5	3.8	11.5	11.5	3.9	2	2	8.9	4.9	7.8	8.8
East Twickenham	10.5	21.1	11.1	0	0	17.65	23.5	9.4	17.3	0	5.7	5.7	5.7	3.8	9.7	18.3	2.9	4.2	4.3	8.6	8.6
Hampton Hill	3.4	0	0	3.4	17.2	24.1	17.2	6.3	8.5	2.1	4.3	6.5	10.4	8.3	5.2	5.3	1.3	3.9	10.7	15.6	11.7
Hampton Village	0	3.6	3.7	3.7	7.1	7.1	14.3	5.6	5.6	0	0	5	0	5	2.2	4.3	2.2	2.1	6.3	4.2	10.4
Ham Parade	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	3	0
Kew Gardens	4	8	4.2	0	0	4.167	0.0	6.3	6.3	6.3	0	6	6	6.3	4.9	7.3	5	0	3	5	2.5
St Margarets	3.2	6.5	0	0	3.2	3.2	3.3	6.3	3.1	9.4	18.8	12.1	12.1	9.1	4.8	4.8	4.8	9.5	7.8	7.8	6.3
Average	4.2	5.1	3.4	4.3	5.1	8.1	8.5	6.6	9.2	2.6	7.1	6.6	8.5	7.0	5.3	6.9	3	5.6	5.8	8.3	7.8
Neighbourhood																					
Castelnau	8.7	13	0	0	9	0	13.0	-	-	-	-	-	-	-	8.7	13	0	0	9	0	13
Friars Stile Road*	0	17.6	6.3	0	6	0	0	-	-	-	-	-	-	-	0	17.6	6.3	0	6	0	0
Hampton Wick*	12.5	12.5	25	12.5	0	12.5	12.5	-	-	-	-	-	-	-	12.5	12.5	25	12.5	0	12.5	12.5
Heathside	0	0	0	0	20	13.3	6.7	0	0	7.7	0	8	7	14	0	0	3.6	0	14	10	10.3
Sheen Road	0	0	11.1	0	11	11	33.3	0	0	0	0	0	0	0	0	0	6.3	0	6	6	14.3
Kingston Road	6.7	13.3	6.7	6.7	6.7	6.7	0	0	50	0	16.7	0	0	0	4.8	23.8	5.6	9.5	4.8	4.8	0
Stanley Road	0	4.8	0	4.8	0	0	0	13.3	13.3	6.7	6.7	12.5	0	0	5.6	8.3	2.8	5.6	5.4	0.0	0
White Hart Lane	9.1	13.6	4.8	9.5	13	9	4.3	4.8	4.8	4.8	9.5	4.8	4.8	5	7	9.3	4.8	9.5	9.1	6.8	4.5
Average	4.7	10	4.7	3.9	8.4	5.3	6.9	4.8	9.7	5.1	6.3	6.3	3.1	4.8	4.7	9.9	4.8	4.7	7.7	4.6	6.2
Local parades																					
Ashburnham Road	0	0	0	0	13	25	25	-	-	-	-	-	-	-	0	0	0	0	12.5	25	25
Fulwell	0	0	11.1	0	22	11	33.3	-	-	-	-	-	-	-	0	0	11.1	0	22	11	33.3
Ham Street / Back Lane	9.1	23.1	15.4	23.1	30.8	15.4	23.1	0	0	0	0	0	0	0	6.7	17.6	11.8	17.6	23.5	11.8	17.6
Hampton Nursery Lands	0	0	0	0	25	25	0	-	-	-	-	-	-	-	0	0	0	0	25	25	0
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	25	0	0	0	-	-	-	-	-	-	-	12.5	12.5	12.5	25.0	0	0	0
Kew Road	-	-	-	-	-	-	0	3.4	0	3.4	3.4	10.3	0.0	0	3.4	0	3.4	3.4	10.3	3.4	6.9
Lower Mortlake Road	0	0	0	0	0	27.3	18.2	0	0	0	0	0	0	0	0	0	0	0	0	25	16.7
Nelson Road	18.2	9.1	18.2	18.2	27.3	0	9.1	-	-	-	-	-	-	-	18.2	9.1	18.2	18.2	27.3	9.1	9.1
Sandycombe Road**	0	0	0	0	17	0	0	0	0	0	16.7	0	33.33	16.7	0	0	0	8.3	16.7	16.7	8.3
Strawberry Hill	14.3	0	0	0	0	0	0	-	-	-	-	-	-	-	14.3	0	0	12.5	25.0	0.0	0
Twickenham Green	22.2	16.7	11.1	0	6	0	5.6	-	-	-	-	-	-	-	22.2	16.7	11.1	0	0	0	7.1
Waldegrave Road	20	10	10	20	20	10	0	0	0	0	0	0	0	0	14.3	7.1	7.1	0	6	6	0
St Margarets Road*	-	-	-	-	-	-	0	25	25	12.5	12.5	25	12.5	12.5	25	25	12.5	14.3	14.3	7.1	7.1
Whitton Road	0	0	0	0	0	0	16.7	-	-	-	-	-	-	-	0	0	0	0	0	0	16.7
Average	9.8	7.3	7.2	7.3	12.2	7.4	10.6	5.8	3.8	3.8	5.8	11.5	5.8	3.8	8.6	6.3	6.3	6.9	12.0	5.7	9.7

Table 12: Vacancy Rates in Local, Neighbourhood Centres and Local Parades (all frontages)

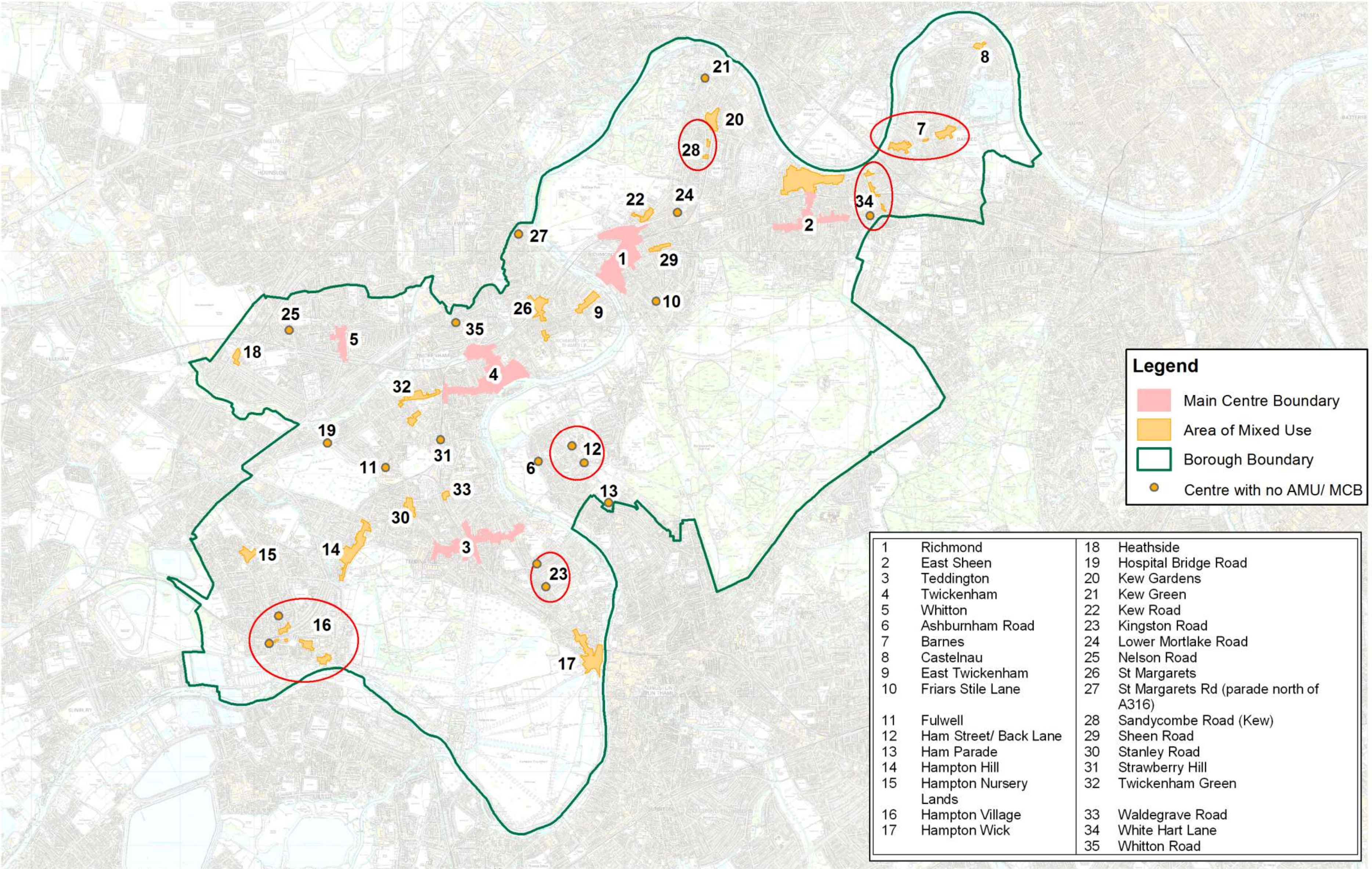
	centre vacancy rate (all frontages)							number of vacant units						
	2014	2015	2016	2017	2019	2020	2021	2014	2015	2016	2017	2019	2020	2021
Local centres														
Barnes	4	2.4	2.4	8.6	7.0	8.6	**7.9**	5	3	3	11	9	11	**10**
East Twickenham	9.1	17.1	2.7	3.9	5.3	9.3	**9.3**	7	13	2	3	4	7	**7**
Hampton Hill	10.6	11.4	6.2	12.9	13.6	14.9	**12.8**	14	15	8	17	18	20	**17**
Hampton Village	2.5	5.1	2.5	1.3	7.4	6.2	**8.5**	2	4	2	1	6	5	**7**
Ham Parade	7	7	7	9.3	0	2	**0.0**	3	3	3	4	0	1	**0**
Kew Gardens Station	3.9	5.9	4.1	2.0	2.1	4.1	**4.2**	2	3	2	1	1	2	**2**
St Margarets	4.5	4.5	4.4	8.8	8.7	8.7	**5.9**	3	3	3	6	6	6	**4**
Average/total	6.3	7.7	4	7.5	7.6	9.0	**8.2**	36	44	23	43	44	52	47
Neighbourhood centres														
Castelnau	8.3	12.5	0	0.0	8.0	0.0	**12**	2	3	0	0	2	0	**3**
Friars Stile Road	5	14.3	5.3	4.8	4.8	0.0	**4.8**	1	3	1	1	1	0	**1**
Hampton Wick	20.7	29.8	11.1	6.9	5.1	8.1	**14.5**	12	17	5	4	3	5	**9**
Heathside	0	0	3	0	15.2	11.8	**11.8**	0	0	1	0	5	4	**4**
Sheen Road	4.7	4.9	6.5	4.3	8.7	4.3	**6.8**	2	2	3	2	4	2	**3**
Kingston Road	4.8	23.8	5.6	9.5	4.8	4.8	**0.0**	1	5	1	2	1	1	**0**
Stanley Road	4.4	6.7	4.4	6.7	8.7	2.2	**2.2**	2	3	2	3	4	1	**1**
White Hart Lane	8.3	13.3	5.4	8.3	8.1	6.3	**6.3**	5	8	3	5	5	4	**4**
Average/total	8.2	13.6	5.6	5.5	8.0	5.3	**7.9**	25	41	16	17	25	17	**25**
Local parades														
Ashburnham Road	0	0	0	0	0.0	25.0	**25**	0	0	0	0	0	2	**2**
Fulwell	0	0	8.3	0	16.7	8.3	**25**	0	0	1	0	2	1	**3**
Ham Street / Back Lane	6.3	16.7	11.1	16.7	22.2	11.1	**16.7**	1	3	2	3	4	2	**3**
Hampton Nursery Lands	0	0	0	0	9.1	8.3	**9.1**	0	0	0	0	1	1	**1**
Hospital Bridge Road	0	0	0	0	0	0	**0**	0	0	0	0	0	0	**0**
Kew Green	5.3	5.3	5.3	15.8	0	5	**5.3**	1	1	1	3	0	1	**1**
Kew Road	2.9	0	2.9	2.9	8.6	2.9	**8.6**	1	0	1	1	3	1	**3**
Lower Mortlake Road	0	0	0	4.5	0	14	**13.6**	0	0	0	1	0	3	**3**
Nelson Road	18.2	9.1	18.2	18.2	27.3	9.1	**9.1**	2	1	2	2	3	1	**1**
Sandycombe Road**	7	4.7	5.1	7.7	10.3	10.3	**0.0**	3	2	2	3	4	4	**2**
Strawberry Hill	14.3	0	0	0	0	0	**0**	2	0	0	0	0	0	**0**
Twickenham Green	23.8	14.3	11.4	4.5	9.1	4.5	**21.4**	10	6	5	2	4	2	**3**
Waldegrave Road	13.3	6.7	6.7	13.3	13.3	6.7	**2.3**	2	1	1	2	2	1	**1**
St Margarets Road*	27.3	18.2	9.1	9.1	18.2	7.1	**0.0**	3	2	1	1	2	1	**2**
Whitton Road	0	6.7	28.6	26.7	33.3	13.3	**16.7**	0	1	4	4	5	2	**2**
Average/total	9	6.1	7.1	7.9	10.8	7.9	**9.8**	25	17	20	22	30	22	**27**

London Borough of Richmond upon Thames
Centre Hierarchy



Local Plan designations
Produced by Local Plan Team

Centres in Richmond upon Thames

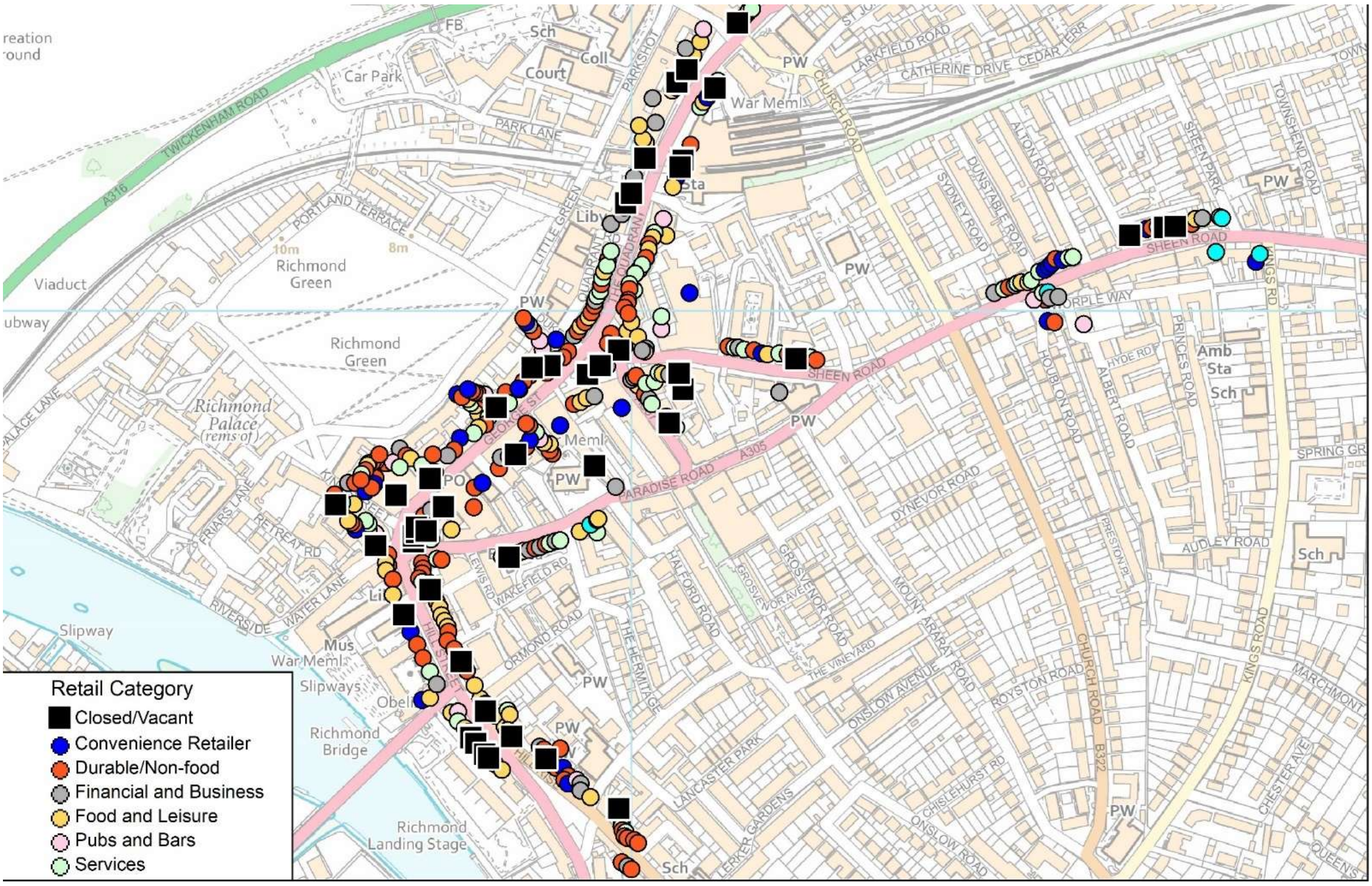


Red circles identify extent of designated frontage in that particular centre

Local Plan designations
Produced by Local Plan Team

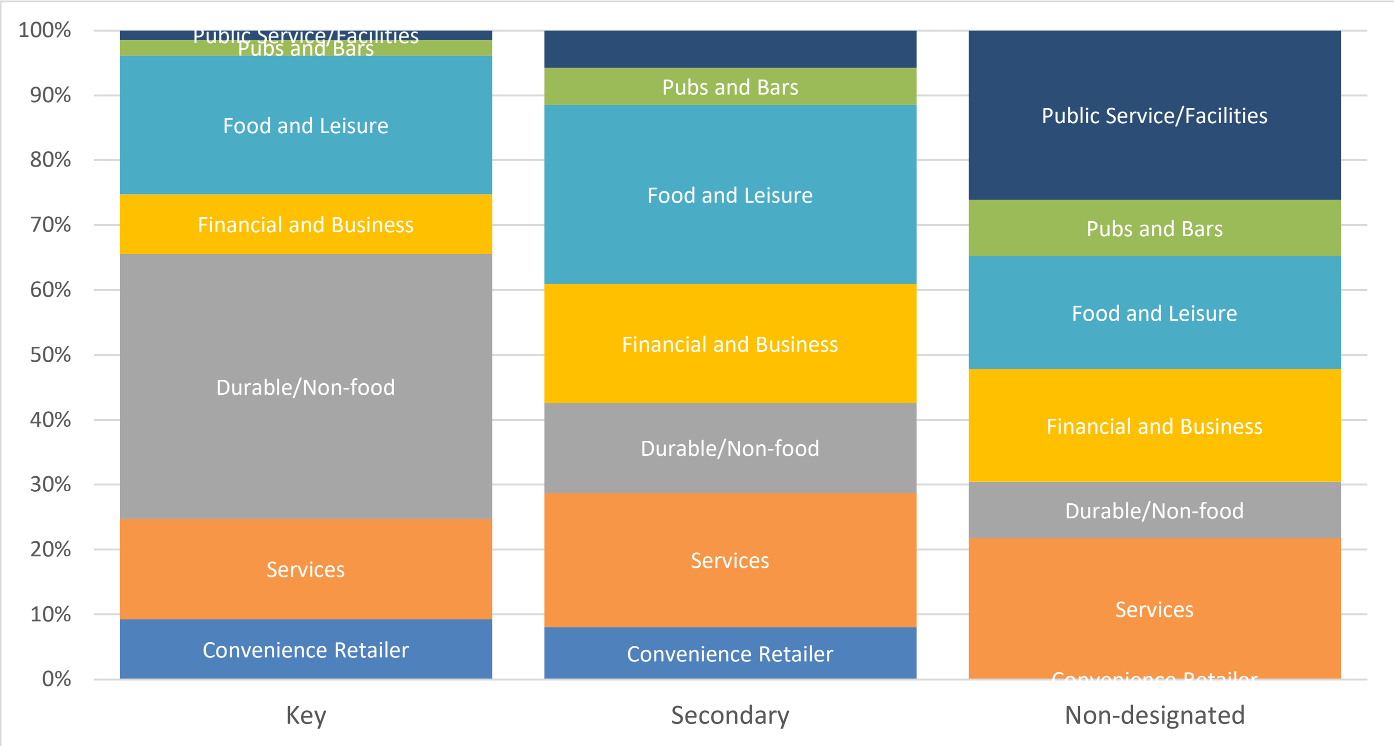
15. Richmond Town Centre – Headline results

- Out of the 44 vacancies in Richmond town centre, 36 were vacant units and 7 units were undergoing refurbishment or construction work.
- 17 of the vacant units were also recorded as vacant in 2020
- Vacancies are spread evenly across the centre with the majority on George Street with 14 vacant units, 5 on Hill Rise, 5 at the Quadrant and 3 on Sheen Road.
- 6 of the newly vacant units were previously restaurants, 3 clothes shops, 2 cafes and an optician were also newly vacant.
- 20 Vacant units were in Key Frontages, and the remainder were in Secondary Frontages



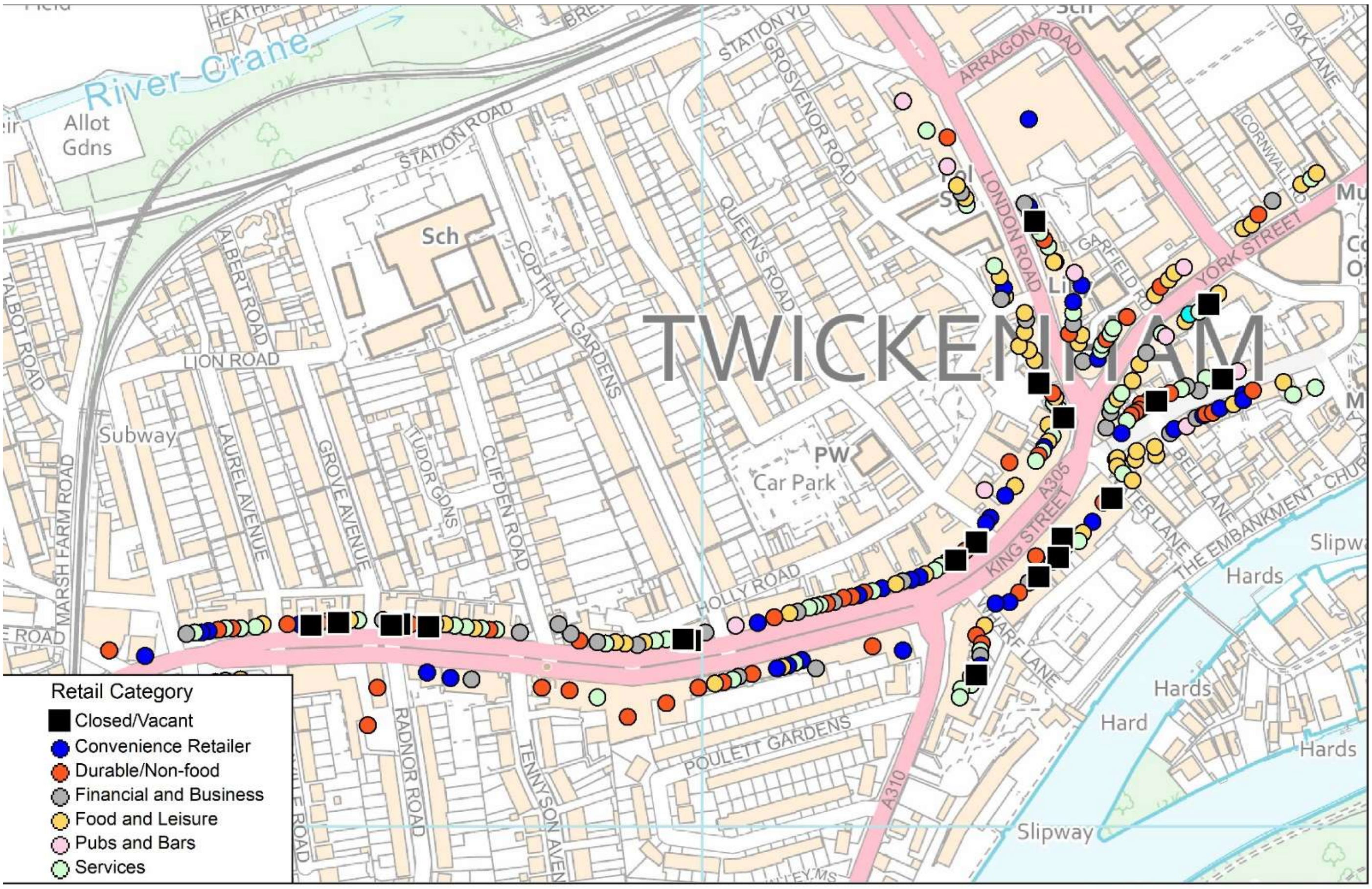
16. Richmond Town Centre – Retail Categories

Frontage	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Key	9%	16%	41%	9%	21%	2%	1%
Secondary	8%	21%	14%	18%	28%	6%	6%
Non-designated	0%	22%	9%	17%	17%	9%	26%
Grand Total	8%	17%	31%	12%	23%	4%	4%



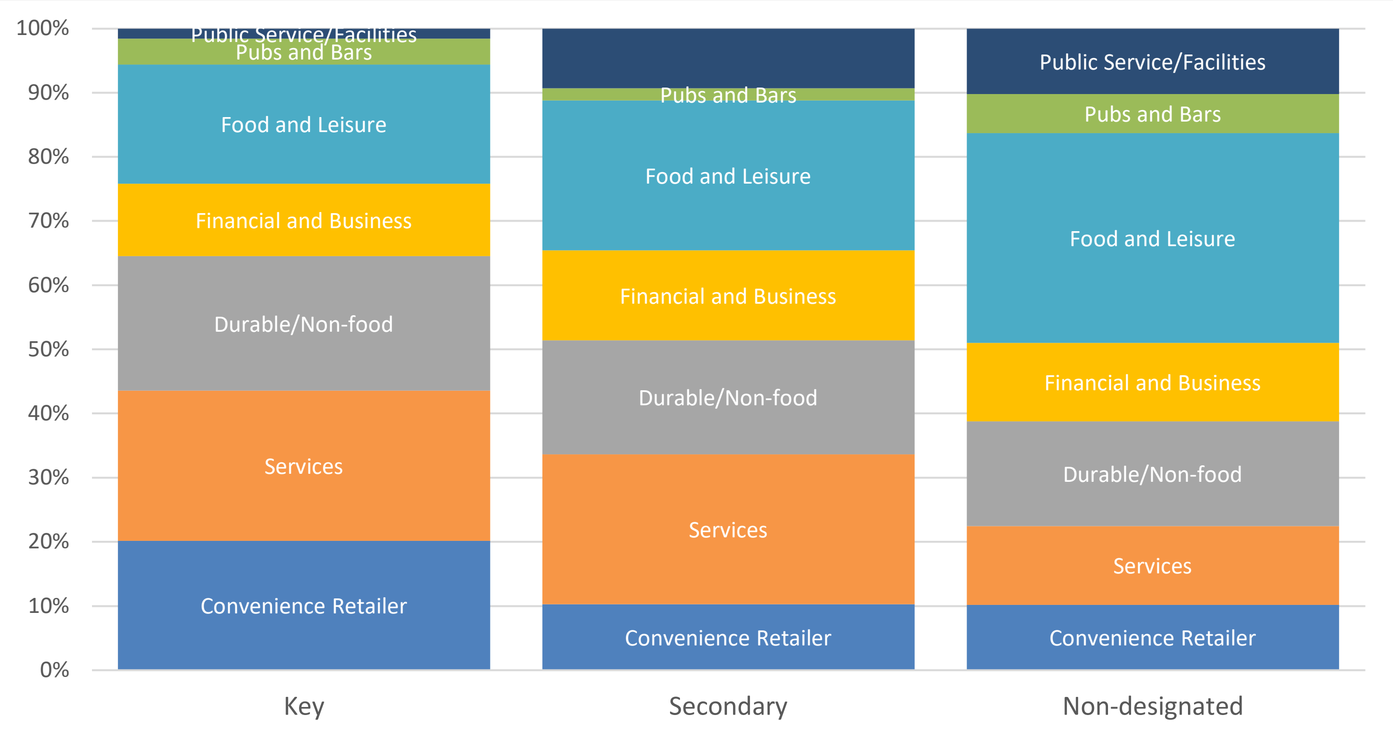
17. Twickenham – Headline results

- There were 20 vacancies in Twickenham Town Centre of which 3 were newly vacant restaurants, 2 newly vacant cafes and 1 newly vacant bank. This compares to a total of 28 vacant units in 2020.
- 11 vacant shops remained unoccupied from 2020.
- 7 vacant units on Heath Road, included 4 newly vacant units and 2 under refurbishment
- 7 vacant units on King Street included 2 newly vacant units
- The remaining vacant units included 3 units on London Road, 2 on Church Street and 1 on York Road.



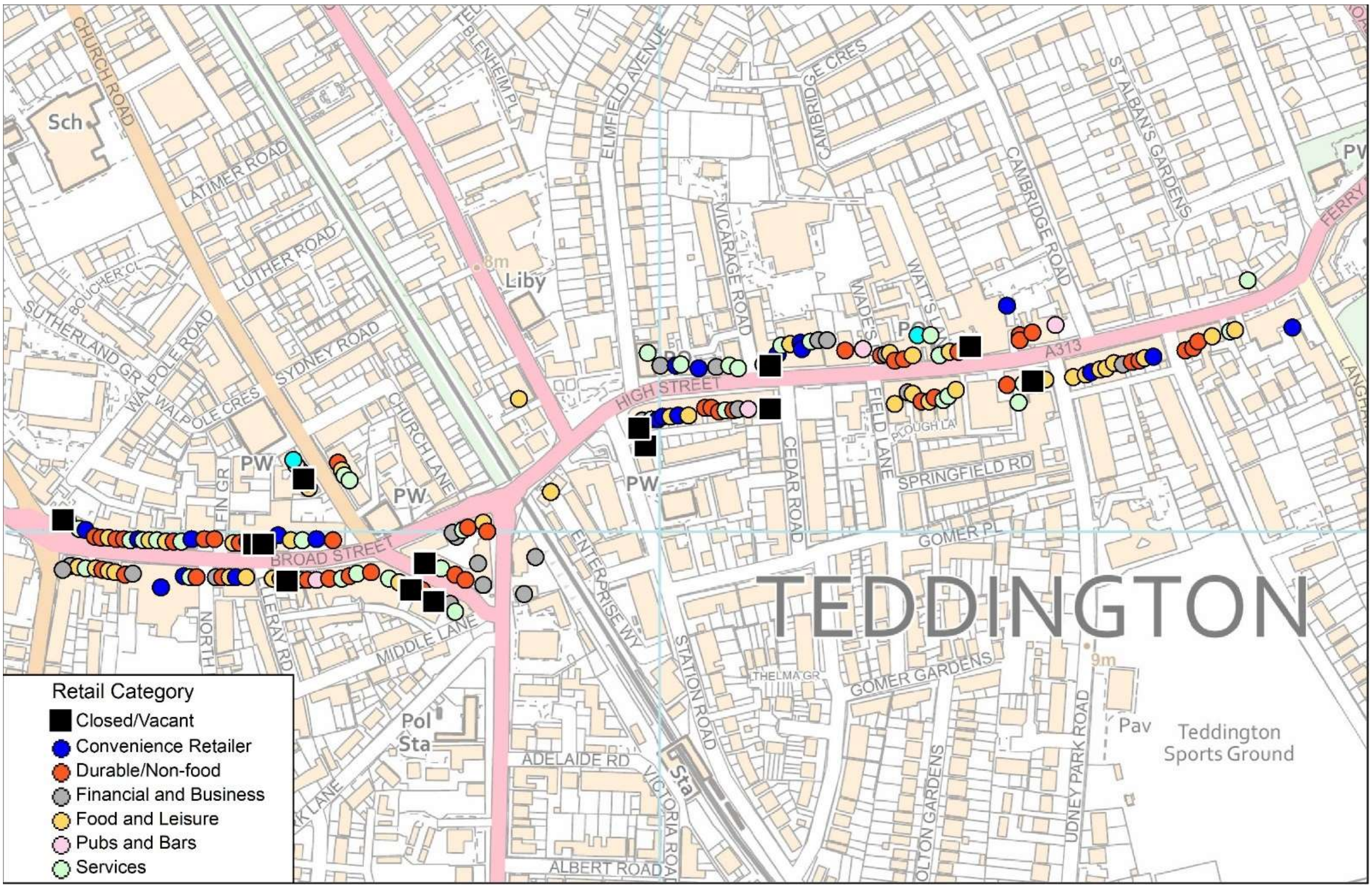
18. Twickenham – Retail Categories

Frontage	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Key	20%	23%	21%	11%	19%	4%	2%
Secondary	10%	23%	18%	14%	23%	2%	9%
Non-designated	10%	12%	16%	12%	33%	6%	10%
Grand Total	15%	21%	19%	13%	23%	4%	6%



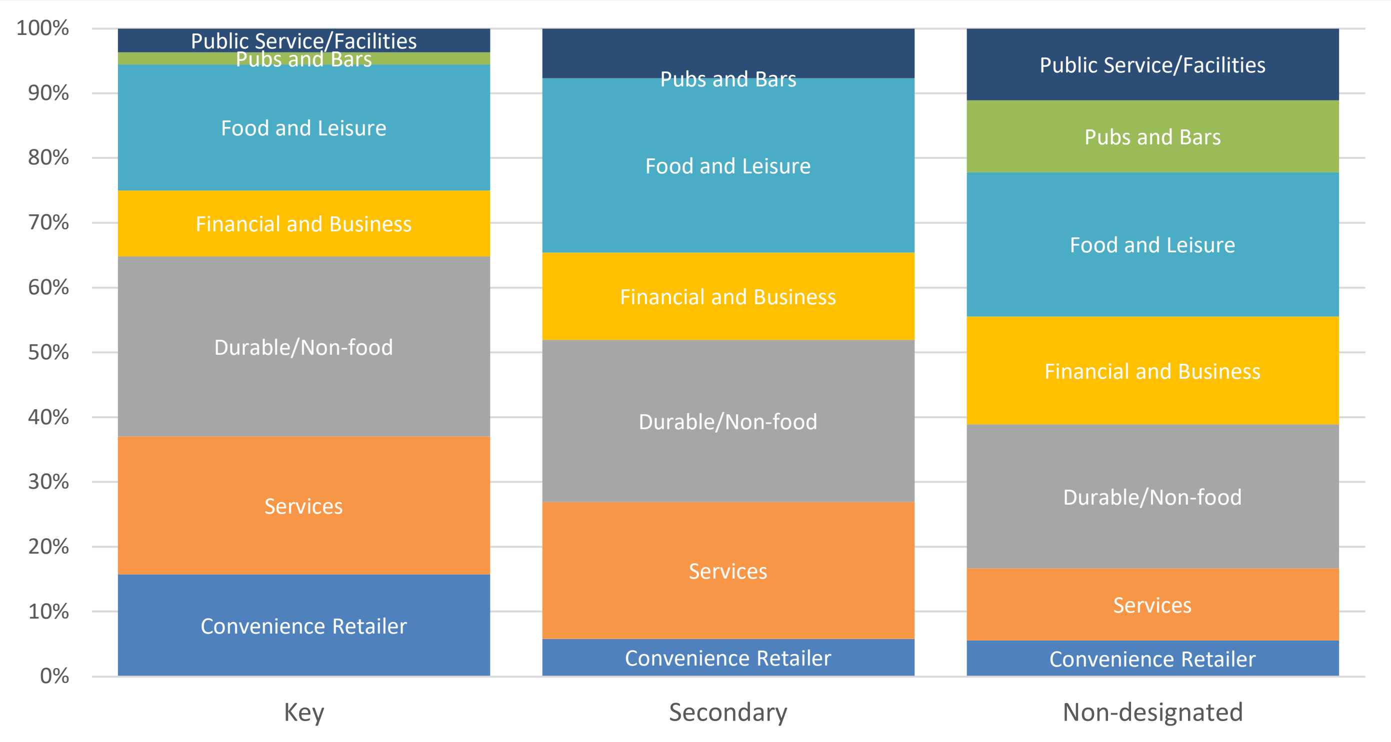
19. Teddington – Headline results

- Teddington had 14 vacant units compared to 16 recorded in 2020.
- This included 8 newly vacant units, 3 closed Café units, an Estate Agent, and a Bank.
- 6 units have remained vacant since 2020.
- 4 vacant units were on Broad Street, including 1 newly vacant restaurant.
- 5 vacant units were on High Street, including 2 Café units and an Estate Agent.
- 3 vacant units at The Causeway included a Bank and 1 unit undergoing refurbishment.
- There has been a decrease in vacancies in the secondary shopping frontages, however the key shopping frontage vacancy rate increased slightly.



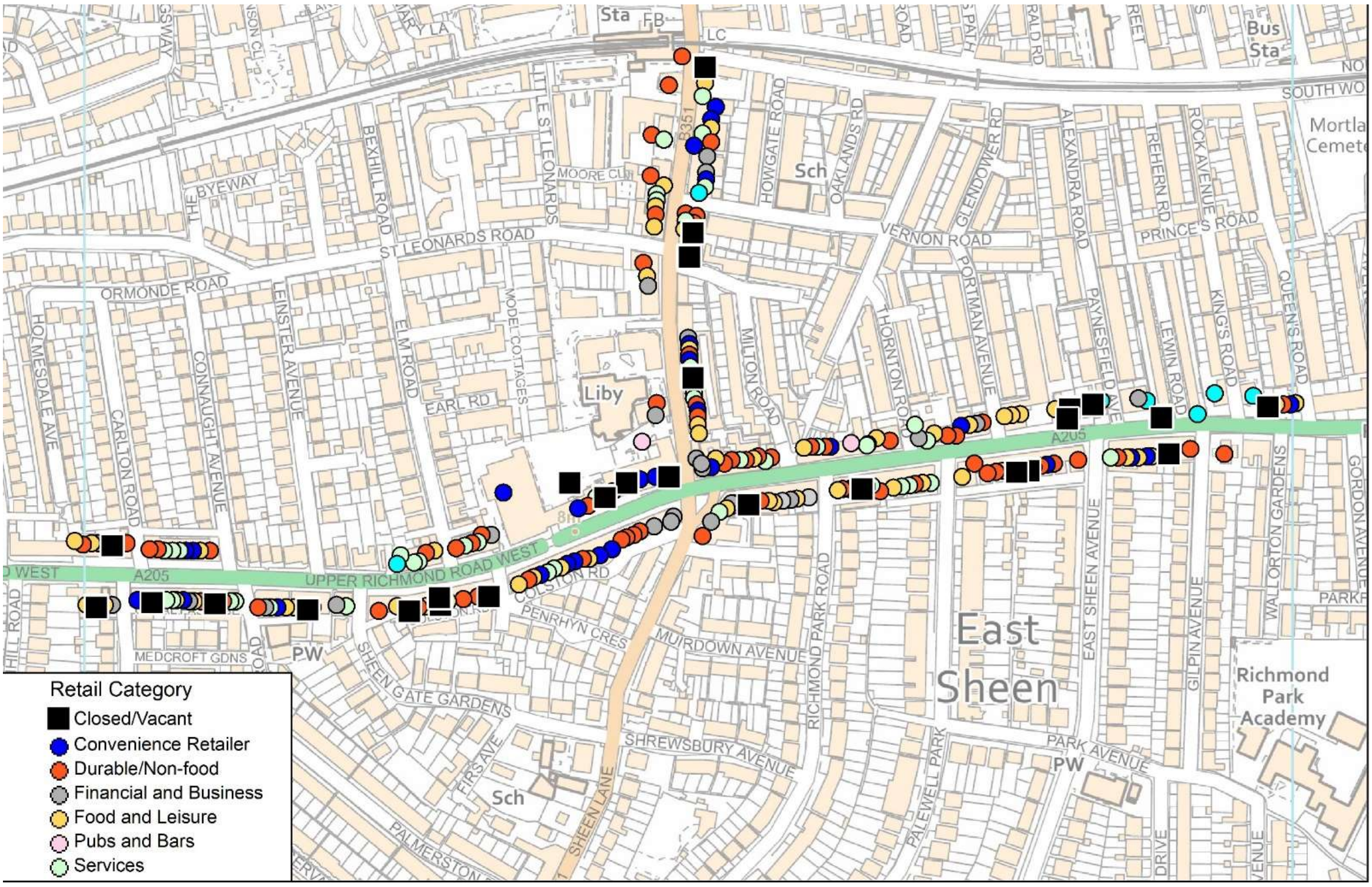
20. Teddington – Retail Categories

Frontage	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Key	16%	21%	28%	10%	19%	2%	4%
Secondary	6%	21%	25%	13%	27%	0%	8%
Non-designated	6%	11%	22%	17%	22%	11%	11%
Grand Total	12%	20%	26%	12%	22%	2%	6%



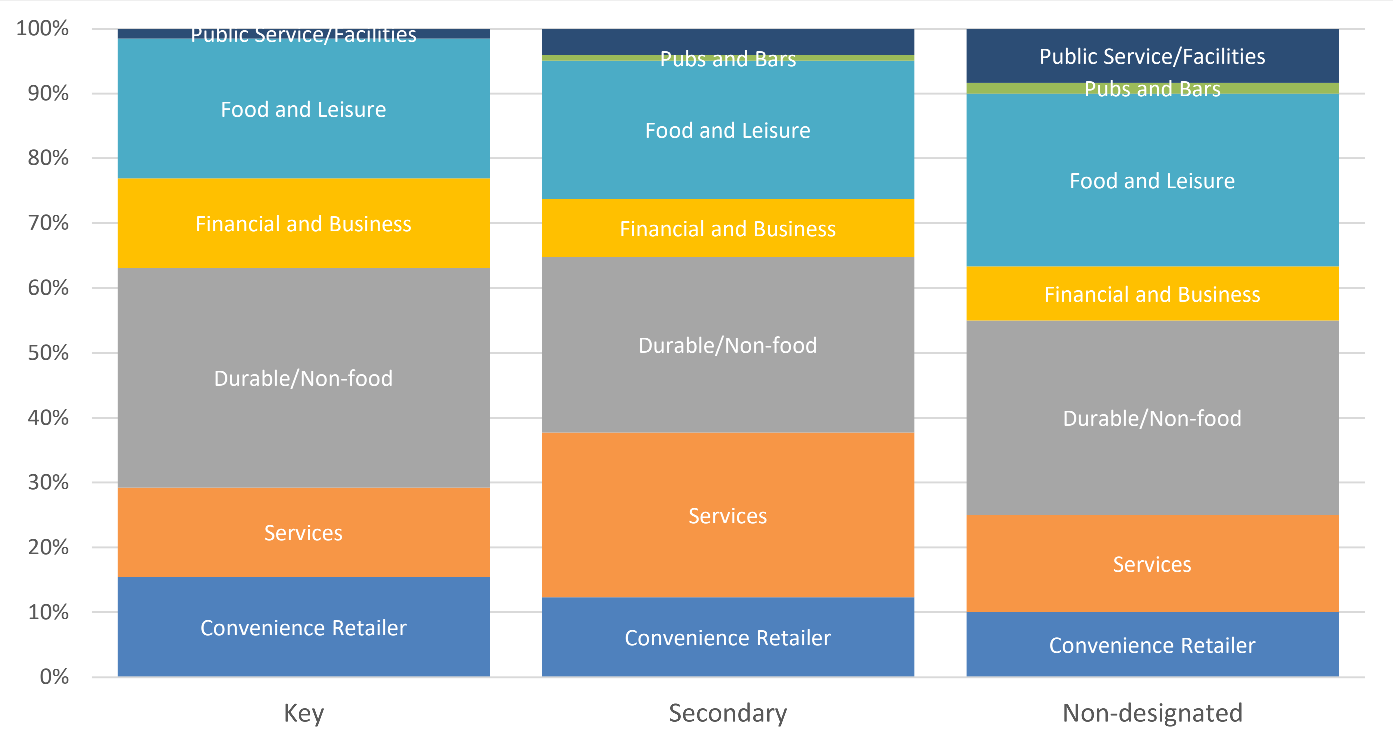
21. East Sheen – Headline results

- East Sheen had 33 vacant units compared with 29 recorded in 2020.
- 12 newly vacant shops included a Bank, furniture and bed showrooms and a chemist.
- 16 units remained unoccupied since the 2020 survey.
- 29 vacant units were on Upper Richmond Road West, and there were 4 vacant units on Sheen Lane
- 12 vacant units were located in Key frontages, 10 in secondary frontages and 11 in non-designated frontages.



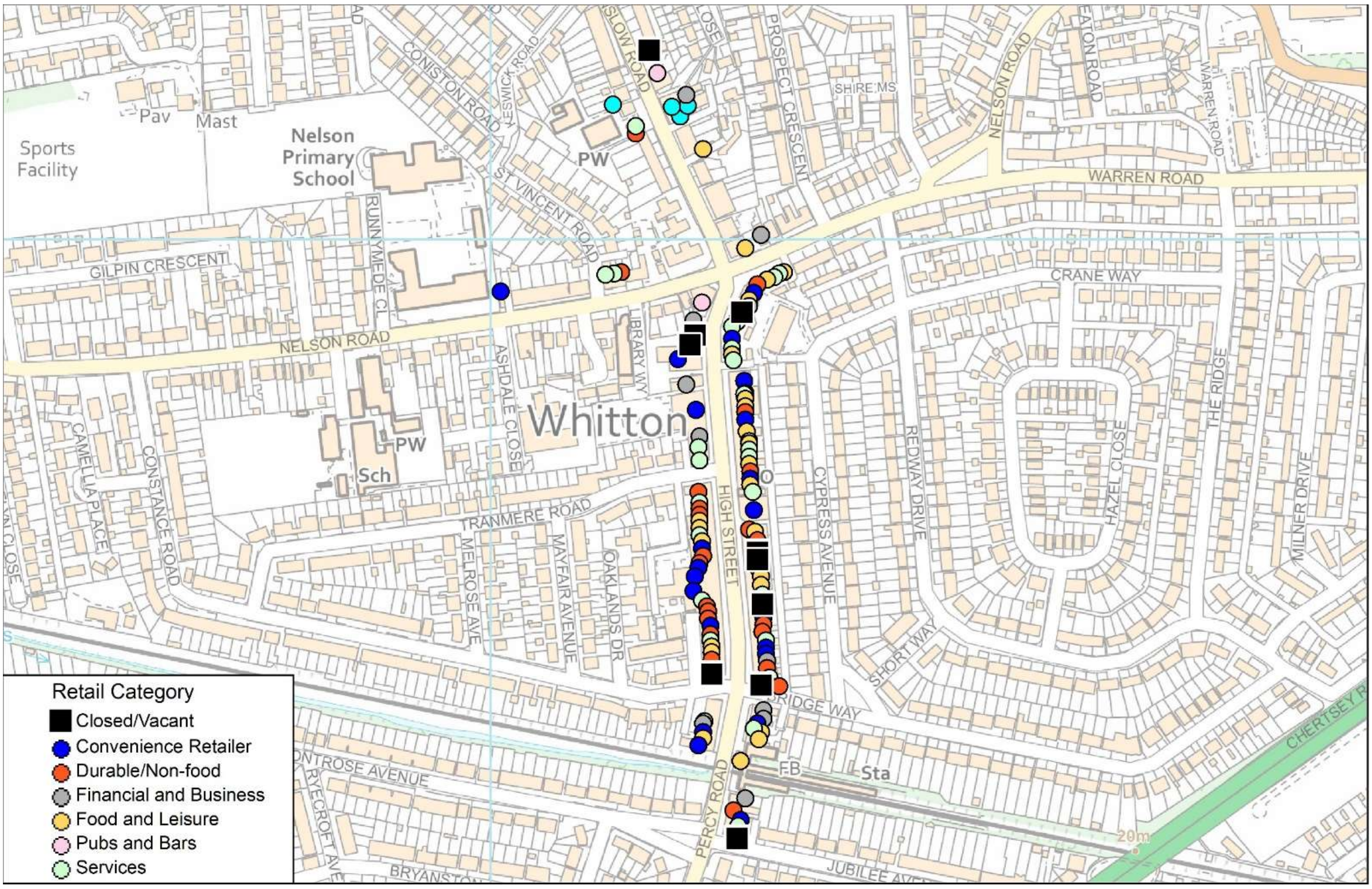
22. East Sheen – Retail Categories

Frontage	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Key	15%	14%	34%	14%	22%	0%	2%
Secondary	12%	25%	27%	9%	21%	1%	4%
Non-designated	10%	15%	30%	8%	27%	2%	8%
Grand Total	13%	20%	30%	10%	23%	1%	4%



23. Whitton – Headline results

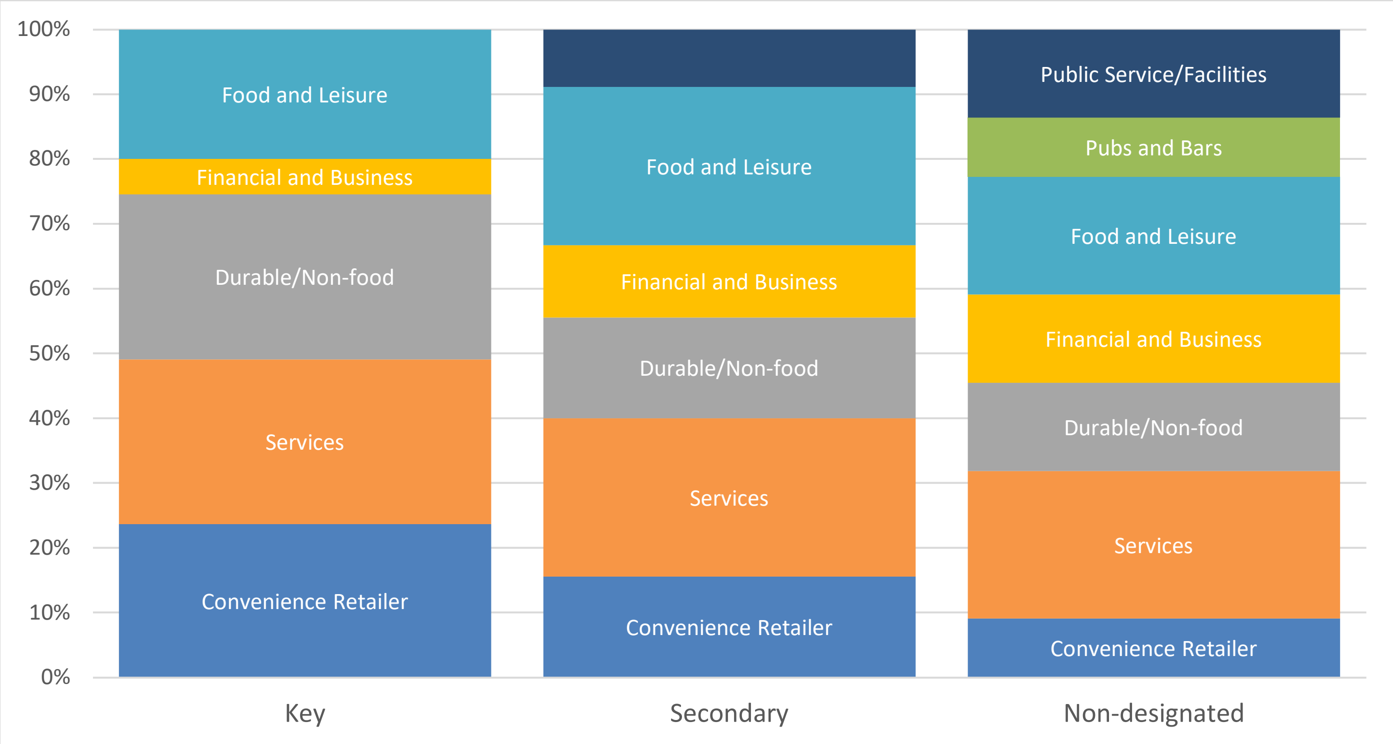
- There were 10 vacant units in Whitton compared to 7 vacancies in 2020 within the main centre boundary[10].
- 4 of these units remained unoccupied since the 2020 survey, and there were 2 newly vacant Banks
- 3 of the vacant units were in key frontages, 5 on secondary frontages and the remaining 2 were on the non-designated frontages at Percy Road and Hounslow Road.



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

24. Whitton – Retail Categories

Frontage	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Key	24%	25%	25%	5%	20%	0%	0%
Secondary	16%	24%	16%	11%	24%	0%	9%
Non-designated	9%	23%	14%	14%	18%	9%	14%
Grand Total	18%	25%	20%	9%	21%	2%	6%



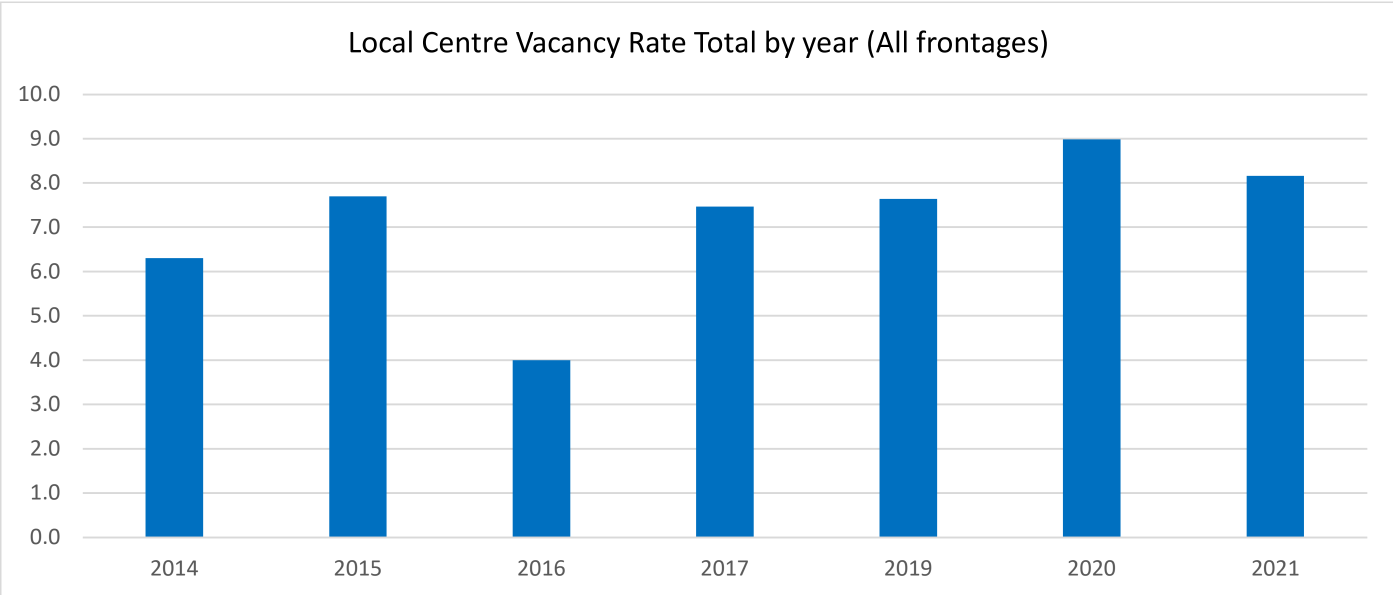
25. Local Centre vacancy rates

Vacancy rates in **key frontages** in the local centres have increased by 0.4% overall to 8.5%, when compared to 2020.

The vacancy rate in **all frontages** in local centres has decreased from 9% in 2020 to 8.2%, with notable decreases in Hampton Hill (-2.1%), Ham Common (-2.3%) and St Margarets (-2.8%). The only increase in the vacancy rate was in Hampton Village (2.3%), however due to the smaller number of units in the local centres, this was only an increase of 2 in the number of vacant units.

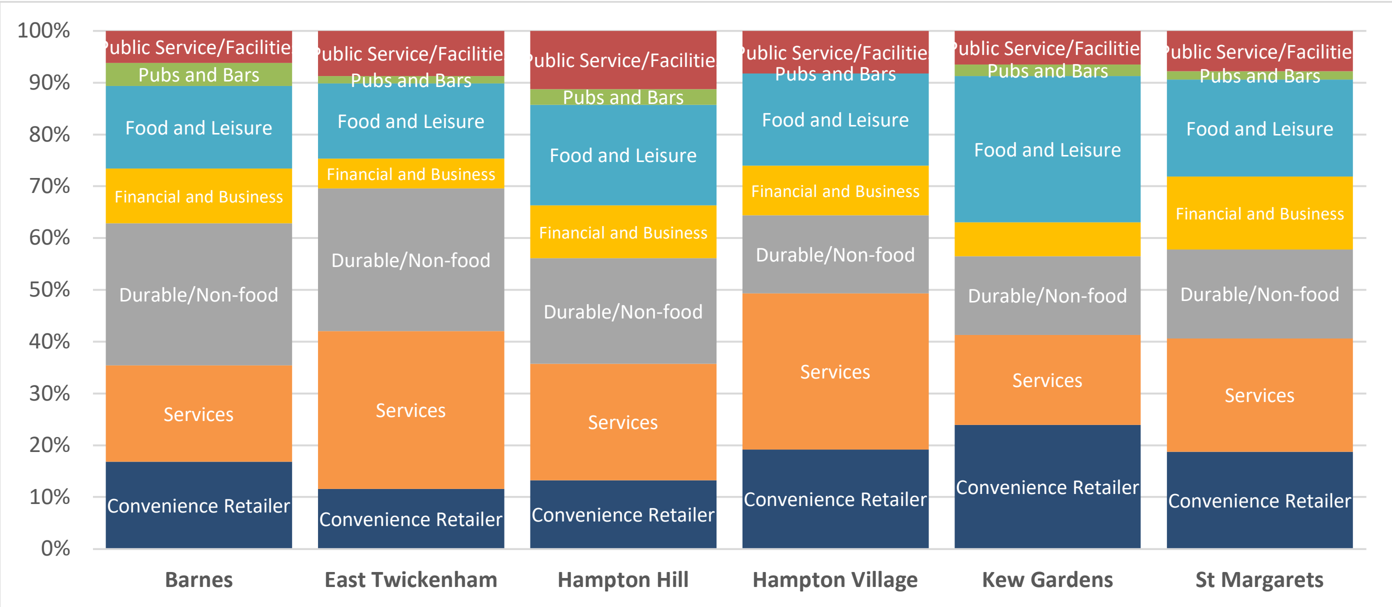
Local Centre Vacancy Rates by year (All frontages)

	2014	2015	2016	2017	2019	2020	2021	Average
Barnes	4.0	2.4	2.4	8.6	7.0	8.6	7.9	5.5
East Twickenham	9.1	17.1	2.7	3.9	5.3	9.3	9.3	7.9
Hampton Hill	10.6	11.4	6.2	12.9	13.6	14.9	12.8	11.6
Hampton Village	2.5	5.1	2.5	1.3	7.4	6.2	8.5	4.2
Ham Common	7.0	7.0	7.0	9.3	0.0	2.3	0.0	5.4
Kew Gardens	3.9	5.9	4.1	2.0	2.1	4.1	4.2	3.7
St Margarets	4.5	4.5	4.4	8.8	8.7	8.7	5.9	6.6
Grand Total	6.3	7.7	4.0	7.5	7.6	9.0	8.2	7.0



26. Local Centre retail categories

	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Barnes	17%	19%	27%	11%	16%	4%	6%
East Twickenham	12%	30%	28%	6%	14%	1%	9%
Hampton Hill	13%	22%	20%	10%	19%	3%	11%
Hampton Village	19%	30%	15%	10%	18%	0%	8%
Kew Gardens	24%	17%	15%	7%	28%	2%	7%
St Margarets	19%	22%	17%	14%	19%	2%	8%
Grand Total	17%	23%	21%	10%	18%	2%	8%



27. Neighbourhood Centre vacancy rates

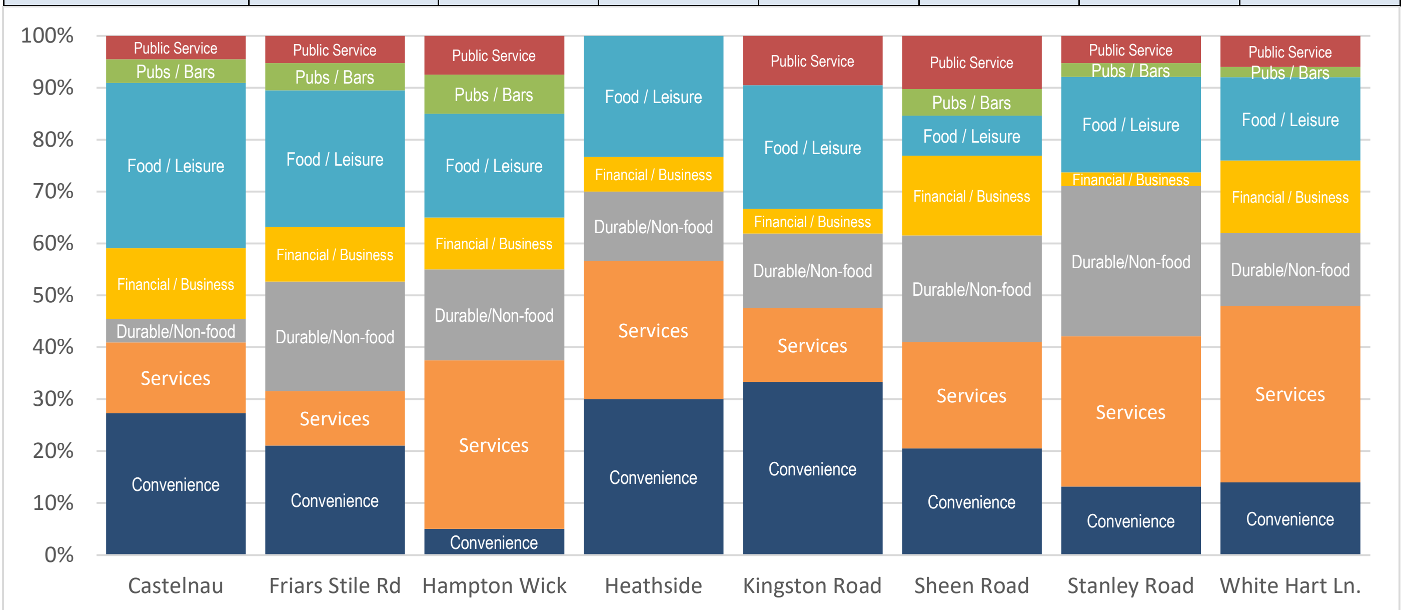
The vacancy rate in **all frontages** in the neighbourhood centres has increased since 2020 from an average of 5.3% to 7.9%. This follows a decrease between 2020 and 2019 from an average of 8% to 5.3%. Castelnau saw the largest increase with 3 out of 25 units becoming vacant, and Hampton Wick also saw an increase from 5 to 9 vacant units out of a total of 62 units in the neighbourhood centre. Friars Style Road and Sheen Road had a small increase in vacancy rates compared to 2020, Kingston Road had no vacant units and Stanley Road, and White Hart Lane had no change in the vacancy rate.

Neighbourhood Centre Vacancy Rates by year (All frontages)

	2014	2015	2016	2017	2019	2020	2021	Average
Castelnau	8%	12%	0%	0%	8%	0%	12%	4.7%
Friars Stile Road	4.8%	14.3%	4.8%	4.8%	4.8%	0%	4.8%	5.6%
Hampton Wick	20.7%	29.3%	8.6%	6.9%	5.1%	8.1%	14.5%	13.1%
Heathside	0%	0%	3%	0%	15.2%	11.8%	11.8%	5%
Sheen Road	4.8%	4.8%	6.4%	4.3%	8.7%	4.3%	6.8%	5.5%
Kingston Road	4.8%	23.8%	4.8%	9.5%	4.8%	4.8%	0%	8.7%
Stanley Road	4.4%	6.7%	4.4%	6.7%	8.7%	2.2%	2.2%	5.5%
White Hart Lane	8.3%	13.3%	5%	8.3%	8.1%	6.3%	6.3%	8.2%
Grand Total	8.2%	13.4%	5.2%	5.5%	8%	5.3%	7.9%	7.6%

28. Neighbourhood Centre retail categories

	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Castelnau	27%	14%	5%	14%	32%	5%	5%
Friars Stile Rd	21%	11%	21%	11%	26%	5%	5%
Hampton Wick	5%	33%	18%	10%	20%	8%	8%
Heathside	30%	27%	13%	7%	23%	0%	0%
Kingston Road	33%	14%	14%	5%	24%	0%	10%
Sheen Road	21%	21%	21%	15%	8%	5%	10%
Stanley Road	13%	29%	29%	3%	18%	3%	5%
White Hart Ln.	14%	34%	14%	14%	16%	2%	6%
Grand Total	19%	25%	17%	10%	19%	3%	6%



29. Local Parades vacancy rates

Local Parades vacancy rates have increased slightly since the 2020 survey, with a total of 27 vacant units compared to 22 recorded in 2020. This brings the vacancy rate up from 7.9% to 9.8%, which is above the average of 8.3%. Fulwell and Kew Road increased by 2 vacant units, and Twickenham Green, St Margarets Road and Ham Street / Back Lane all increased by 1 vacant unit. Sandycombe Road had a 2 fewer vacant units than in 2020. Strawberry Hill and Hospital Bridge Road both recorded no vacant units, as has been the case for several years.

	2014	2015	2016	2017	2019	2020	2021	Average
Ashburnham Road	0%	0%	0%	0%	0%	25.0%	25.0%	7.1%
Fulwell	0%	0%	8.3%	0%	16.7%	8.3%	25.0%	8.3%
Ham Street/ Back Lane	5.6%	16.7%	11.1%	16.7%	22.2%	11.1%	16.7%	14.3%
Hampton Nursery Lands	0%	0%	0%	0%	9.1%	8.3%	9.1%	3.8%
Hospital Bridge Road	0%	0%	0%	0%	0%	0%	0%	0%
Kew Green	5.3%	5.3%	5.3%	15.8%	0%	5.3%	5.3%	6.0%
Kew Road	2.9%	0%	2.9%	2.9%	8.6%	2.9%	8.6%	4.1%
Lower Mortlake Road	0%	0%	0%	4.5%	0%	13.6%	13.6%	4.5%
Nelson Road	18.2%	9.1%	18.2%	18.2%	27.3%	9.1%	9.1%	15.6%
Sandycombe Road	7.0%	4.7%	5.1%	7.7%	10.3%	10.3%	5.3%	7.2%
Strawberry Hill	14.3%	0%	0%	0%	0%	0%	0%	2.0%
Twickenham Green	23.8%	14.3%	11.4%	4.5%	9.1%	4.5%	6.8%	10.6%
Waldegrave Road	13.3%	6.7%	6.7%	13.3%	13.3%	6.7%	6.7%	9.5%
St Margarets Road	27.3%	18.2%	9.1%	9.1%	18.2%	7.1%	14.3%	14.7%
Whitton Road	0%	6.7%	26.7%	26.7%	33.3%	13.3%	16.7%	17.6%
Grand Total	8.9%	6.0%	7.1%	7.9%	10.8%	7.9%	9.8%	8.3%