LONDON BOROUGH OF RICHMOND UPON THAMES

Local Plan

Authority's Monitoring Report

VACANCY RATES IN THE BOROUGH'S CENTRES 2014

This document is part of a series of publications which make up the Council's Authority's Monitoring Report 2013/14.

November 2014

LONDON BOROUGH OF RICHMOND UPON THAMES

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Nese keni veshtersi per te kuptuar kete botim, ju lutemi ejani ne recepcionin ne adresen e shenuar me poshte ku ne mund te organizojme perkthime nepermjet telefonit.

Albanian

إذا كانت لديك صعوبة في فهم هذا المنشور، فنرجو زيارة الإستقبال في العنوان المعطى أدناه حيث بإمكاننا أن نرتب لخدمة ترجمة شفوية هاتفية.

Arabic

এই প্রকাশনার অর্থ বুঝতে পারায় যদি আপনার কোন সমস্যা হয়, নিচে দেওয়া ঠিকানায় রিসেপ্শন-এ চলে আসুন যেখানে আমরা আপনাকে টেলিফোনে দোভাষীর সেবা প্রদানের ব্যবস্থা করতে পারবো।

Bengali

اگر در فهمیدن این نشریه مشکلی دارید لطفا به میز پذیرش در آدرس قید شده در زیر مراجعه نمایید تا ترتیب ترجمه تلفنی برایتان فراهم آورده شود:

Farsi

જો તમને આ પુસ્તિકાની વિગતો સમજવામાં મુશ્કેલી પડતી હોય તો, કૃપયા નીચે જણાવેલ સ્થળના રિસેપ્શન પર આવો, જ્યાં અમે ટેલિફોન પર ગુજ રાતીમાં ઇન્ટરપ્રિટીંગ સેવાની ગોઠવણ કરી આપીશું.

Gujurati

ਜੇਕਰ ਤੁਹਾਨੂੰ ਇਸ ਪਰਚੇ ਨੂੰ ਸਮਝਣ ਵਿਚ ਮੁਸ਼ਕਲ ਪੇਸ਼ ਆਉਂਦੀ ਹੈ ਤਾਂ ਹੇਠਾਂ ਦਿੱਤੇ ਗਏ ਪਤੇ ਉੱਪਰ ਰਿਸੈਪਸ਼ਨ 'ਤੇ ਆਓ ਜਿੱਥੇ ਅਸੀਂ ਟੈਲੀਫ਼ੋਨ ਤੇ ਗੱਲਬਾਤ ਕਰਨ ਲਈ ਇੰਟਰਪ੍ਰਿਟਰ ਦਾ ਪ੍ਰਬੰਧ ਕਰ ਸਕਦੇ ਹਾਂ।

Punjabi

Local Plan Authority's Monitoring Report

2014 Town Centre Land Use Survey: Vacancy rates in the borough's centres

This document is part of a series of publications which make up the Council's Authority's Monitoring Report 2013/14.

These documents will be published in a phased approach on the Council's website, and can be viewed via the following link

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

This is the first report of the series.

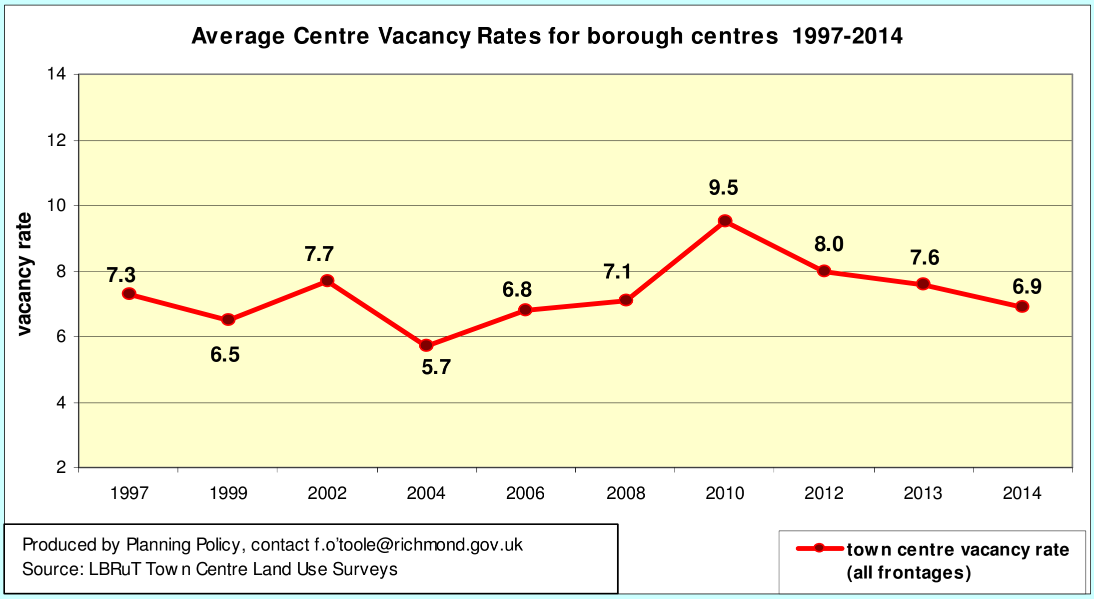
Summary

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.

The key findings are as follows:

Centre vacancy rates (all uses in all frontages)

- **The number of vacant units boroughwide has fallen noticeably over the last three years. The total number of vacancies fell again to 168 in 2014** from 185 in 2013, 194 in 2012 and 231 in 2011.



- **Vacancy rates in the borough's main town centres have dropped between 2013 and 2014 with the exception of Richmond town centre which has experienced a slight increase amounting to 1 additional vacant unit overall.**
- In 2014 there were 82 vacant units in the 5 main centres combined, compared to 99 in 2013 and 98 in 2012. Three years' positive figures may not be enough to suggest a sustained recovery, but are a good sign that vacancy levels are returning to post-recession levels.
- Average vacancy rates in local & neighbourhood centres and local parades were all significantly lower than the national average (c.12%, GOAD figure). The picture is slightly mixed, in that on average rates have fallen in neighbourhood centres, remained essentially the same for local parades (very slight increase by 1 vacancy), but have risen for the larger local centres.

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)

- **Overall the picture is positive with a fall in shop vacancies in the majority of centres, and overall decline in total numbers of vacancies for the third year running since monitoring began.**

- **Vacant shops have been analysed in 2012, 2013 and 2014. Each year the numbers have declined: from 125 in 2012, to 116 in 2013 and again to 100 in 2014.** In 2013 some 8.8% of shops were vacant, this **borough wide shop vacancy rate fell to 7.7%** in 2014.
- Just over half of vacant shops are in the 5 main town centres. Twickenham has discernibly more vacant shops than the other main centres, (but with the exception of Richmond which has one more vacant shop than in 2013), all the district centres have fewer vacant shops than last year.

1. Introduction

1.1.1 This document is one in a series of documents which make up the Council's Authority's Monitoring Report 2013/14. It is a statutory requirement to produce an AMR (previously known as the Annual Monitoring Report). The Localism Act received Royal Assent on the 15 November 2011. In subsection 113 there is a requirement for local authorities to prepare a report which should include information on the implementation of the local development scheme and the extent to which the policies set out in the local development documents are being achieved, and to make it publicly available as soon as available[1].

1.1.2 Changes brought in by the Act introduced greater flexibility in how AMRs can be produced. Previously, the AMR was required to be published as one large document in December each year. The requirement for a single report to be produced at a specific time has been removed by current legislation. This year a number of documents will be published in Winter 2014/Spring 2015, when available, which together will make up the AMR. This report is the first in the series.

2. Methodology

2.1.1 The Council has undertaken an Annual Land Use Survey of borough centres since the late 1990s.

2.1.2 The Land Use Survey is a snap shot survey, undertaken by observation in the field, i.e. the researcher makes a judgement as to the nature of the occupier on that particular day. Information is not requested from landlords, nor verified by an alternative data source. A judgement will be taken by the surveyor in the field as to whether the business is operating, but not open on the survey day. This would include for example, businesses only opening in the evenings, and a small number of shops which still close on Wednesday afternoons.

2.1.3 Only the ground floor use is recorded unless specified (one-off for 1998 survey). It is therefore not a survey of floorspace. (Richmond has a number of stores which operates sales areas over several floors.) Analysis counts businesses once per centre unless operating from separate premises within the same centre. Therefore, the amalgamation of units will not show the increase in floorspace and may in fact indicate a decrease in units in a particular use class, although the denominator would be reduced in line.

2.1.4 As many businesses are included as possible including a small number which are outside of town centre boundaries/mixed use areas as defined in the Local Plan.

2.1.5 Units being refurbished for a new occupier are included in the vacancy count. In a small number of instances a unit which is advertising the new occupier and will be opening in the very near future is not considered a vacancy.

2.1.6 The document includes a **centre vacancy rate** which is the number of vacant premises as a proportion of the total premises in the centre. Since there is considerable interest in the health of retail (A1 use class – shops, including A1 services such as hairdressers, ticket offices, Post Offices) in town centres at present a **shop vacancy rate** is also included which is the number of vacant shops as a proportion of all shops.

3. Background

3.1 Policy context:

National

3.1.1 Key policies within the National Planning Policy Framework, relevant to retail are contained in paras 23-27.

[1] http://www.legislation.gov.uk/ukpga/2011/20/section/113/enacted

3.1.2 In May 2013 the government introduced changes to permitted development rights which affect town centres, making it easier to change between certain uses without the need for planning permission, for a two year period.

Further changes to permitted development rights came into force in April 2014 **which introduced**

- **Retail to residential - a** new class IA allowing 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). This involves a 'prior approval' process and the local planning authority can consider impacts of the proposed change. Up to 150 square metres of retail space will be able to change to residential use. This new right does not apply to land protected by article 1(5) of the General Permitted Development Order, including Conservation Areas.
- **retail to banks and building societies** - new class CA allows change of use from a shop (A1) to a bank or a building society.

3.1.3 The government has recently consulted on more changes to the planning system which if taken forward will allow further change of use from retail as permitted development, and potentially a new wider retail class encompassing much of the existing A2 use class.

Regional:

3.1.4 **The London Plan (July 2011)** provides the regional planning policy context for Richmond Borough and together with the Richmond Local Plan, forms part of the adopted Development Plan. Key policies are 2.15, and 4.7-4.9. On 15th January 2014, the Mayor published Draft Further Alterations to the London Plan (FALP) for a twelve week consultation. The EiP has now been completed.

Local:

3.1.5 (i)In terms of local policy, the Core Strategy is the strategic policy document, of particular relevance are CP 8 Town and Local Centres & CP 9 Twickenham town centre.

3.1.6 (ii) The Development Management Plan takes forward the Core Strategy with more detailed policies for the control of development. Key town centre policies are as follows:

- Policy DMTC 1: Larger town centres
- Policy DMTC 2: Local and Neighbourhood Centres and Areas of Mixed Use
- Policy DM TC 3: Retail Frontages – outlining where and if change of use from retail is acceptable depending on designation. Its purpose is to identify the best location for retail and ensure an appropriate balance of uses in town centres.
- Policy DM TC 5: The Evening Economy – in relation to Twickenham, it encourages diversification of the evening economy.

3.1.7 (iii) The **Twickenham Area Action Plan**
The TAAP was adopted in July 2013. It contains 3 policies on retail and economic development and also a number of proposal sites in the town centre.

3.2 Structural changes to retailing

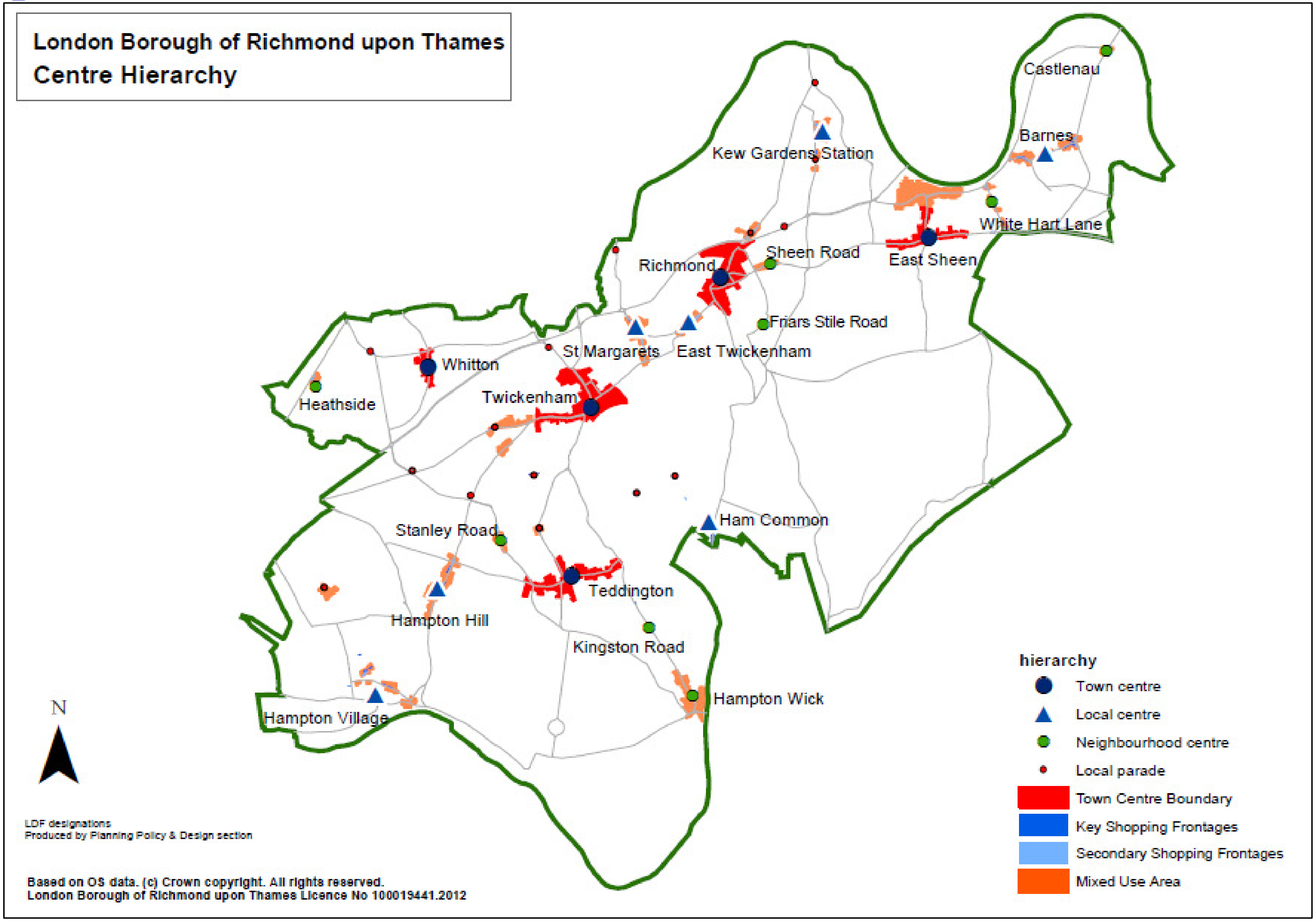
3.2.1 There are also well-documented changes to the retail sector resulting from growth in multichannel retailing, primarily via the internet, which has resulted in debate about the amount of shopping needed in the High Street. Recent research suggests that the capital[2], and the borough specifically[3], still requires additional retail floorspace. It is especially important and timely to monitor town centres.

[2] http://www.london.gov.uk/priorities/planning/publications/consumer-expenditure-and-comparison-goods-retail-floorspace-need
[3] http://www.richmond.gov.uk/richmond_retail_study_november_2014.pdf

3.3 The Borough's town centres

Table 1: centre hierarchy

Type of Centre	Name of Centre
Major town centre (with many shops services, employment and entertainment which service a much wider catchment than just the local population)	Richmond
District centres (shops and services primarily serving local catchments but providing for main weekly convenience shopping)	Twickenham, Teddington, East Sheen and Whitton
Local centres (shops and services for day to day needs, some small offices)	Barnes, East Twickenham, Hampton Hill, Hampton Village, Ham Common, Kew Gardens Station, St Margaret's
Neighbourhood centres (shops and services for day to day needs)	Castelnau; Friars Stile Road; Hampton Wick; Heathside (Powder Mill lane); Sheen Road; Kingston Road, Teddington; Stanley Road, Teddington; White Hart Lane
Parades of local importance	Various across the Borough


London Borough of Richmond upon Thames
Centre Hierarchy
Castlenau
Barnes
Kew Gardens Station
White Hart Lane
East Sheen
Sheen Road
Richmond
Friars Stile Road
St Margarets
East Twickenham
Whitton
Heathside
Twickenham
Ham Common
Stanley Road
Teddington
Hampton Hill
Kingston Road
Hampton Wick
Hampton Village
N
hierarchy
Town centre
Local centre
Neighbourhood centre
Local parade
Town Centre Boundary
Key Shopping Frontages
Secondary Shopping Frontages
Mixed Use Area
LDF designations
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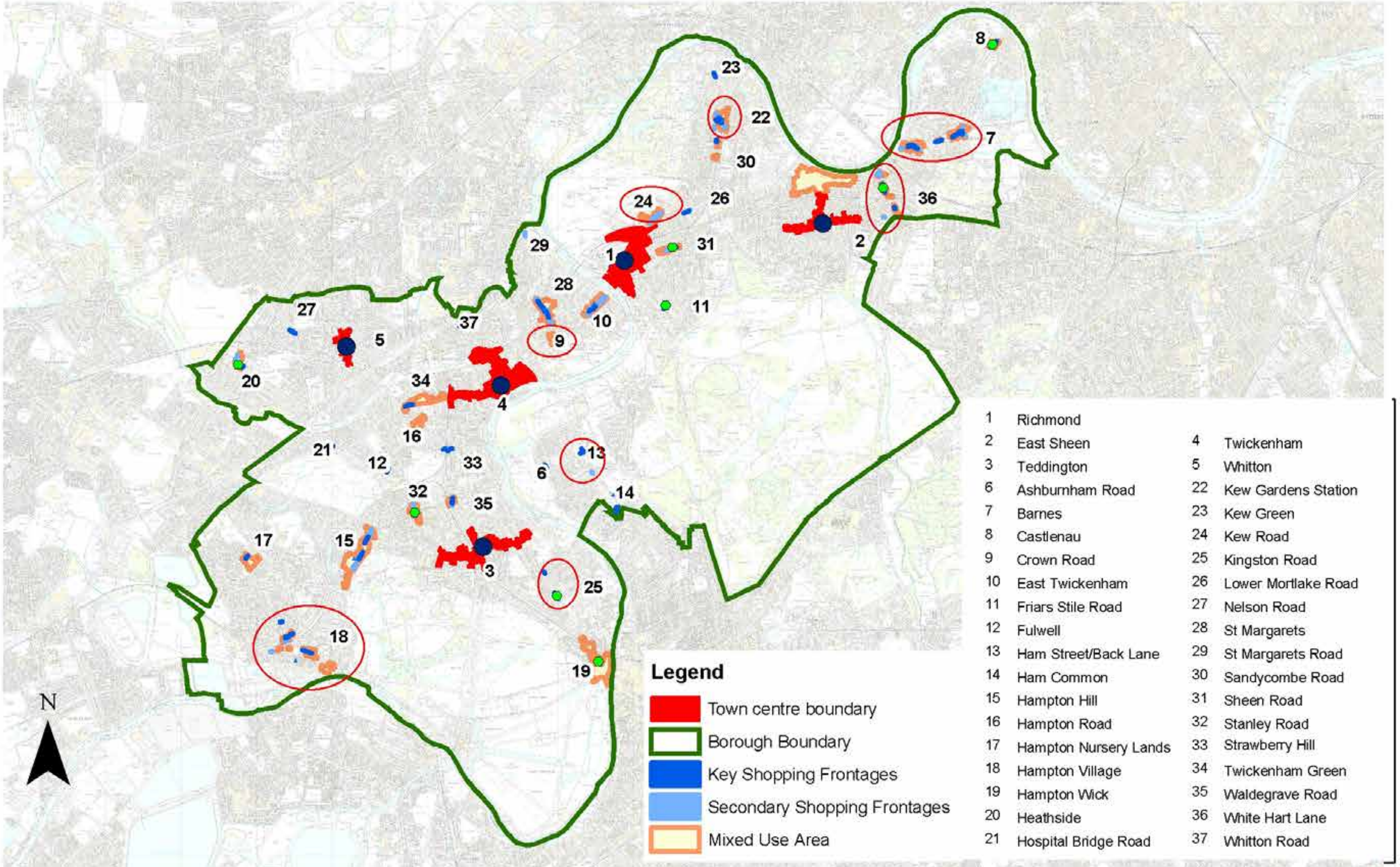
Location of town, local centres and local parades in Richmond upon Thames



Red circles identify extent of designated frontage in that particular centre

LDF designations
Produced by Planning Policy & Design Section

4.0 Vacancy rates

4.1 Centre vacancy rates

Table 2 : Vacancy rates in 5 main town centres

	key shopping frontage						secondary shopping frontage						all designated frontage						all frontage			
	2008	2010	2011	2012	2013	2014	2008	2010	2011	2012	2013	2014	2008	2010	2011	2012	2013	2014	2011	2012	2013	2014
Richmond	5.1	4.6	8.4	7.8	4.7	6.0	4.9	10.9	16.8	10.0	8.9	6.9	5	6.5	10.9	8.4	6.0	6.3	11.3	8.3	6.2	6.5
East Sheen	4.6	4.5	9.2	2.6	3.9	5.3	11.1	12.7	9.1	6.6	9.0	6.8	7.7	8.4	9.1	5.2	7.1	6.2	9.8	6.5	7.6	5.9
Teddington	5.3	7.9	1.7	2.6	4.3	3.4	4.3	7.8	9.7	10.0	10.0	1.7	4.7	7.8	4.5	5.1	6.2	2.8	4.1	5.2	6.2	2.6
Twickenham	4.5	6.8	5.3	8.3	9.1	9.2	3.9	6.5	12.3	10.3	10.4	7.9	4.3	6.7	8.5	9.3	9.7	8.6	10.0	8.7	10.7	9.4
Whitton	8.7	5.8	10.3	10.3	5.3	7.1	25.6	27.0	10.2	10.0	12.0	6.0	14.8	13.2	10.3	10.2	8.4	6.6	9.6	10.4	8.1	6.7
Average	**5.6**	**5.5**	**6.8**	**6.5**	**5.5**	**6.2**	**10**	**11.1**	**11.8**	**9.2**	**9.8**	**6.3**	**7.3**	**7.9**	**8.9**	**7.6**	**7.4**	**6.3**		**7.7**	**7.8**	**6.5**

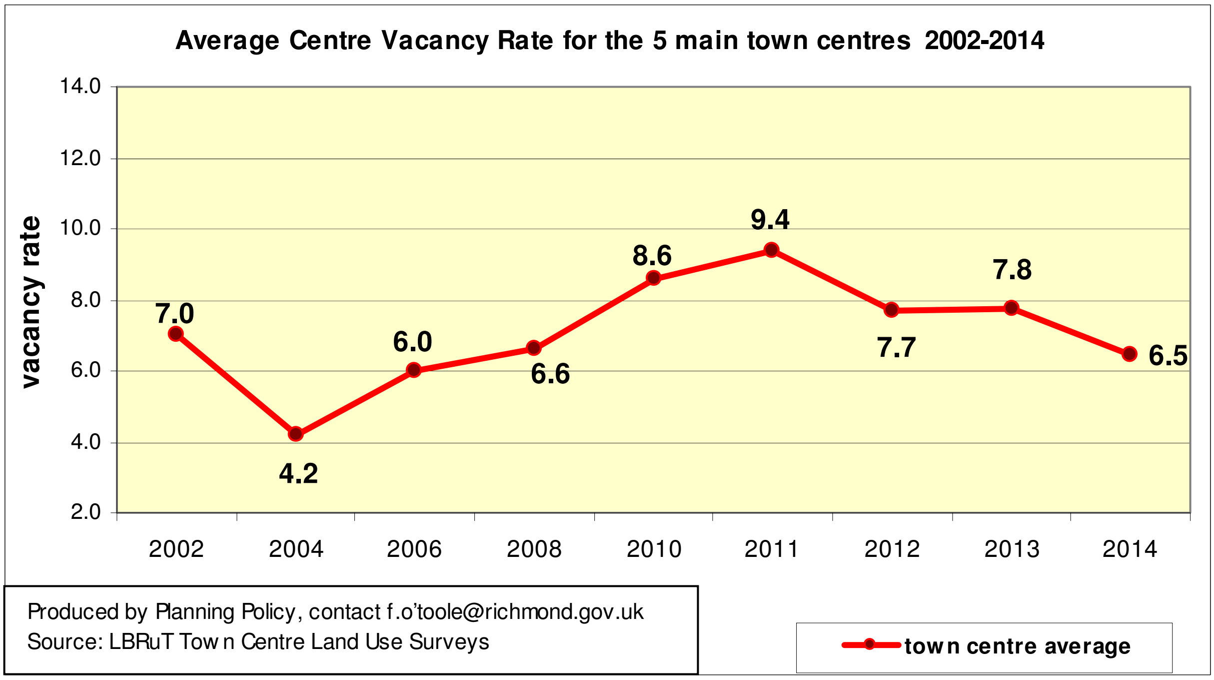
Source: LBRuT Town Centre Land Use Surveys. Produced by Planning Policy Section. Snapshot surveys.
Red indicates an increase in the rate between 2013 and 2014, black no change, and **blue** an fall in the rate.

4.1.1 Vacancy rates are regarded as one of, if not the best indicator of the health of town centres. However, unlike some indicators such as pedestrian flow which provide up-to-date information, it may take some time for change to reveal itself through vacancy rates. This is because data are collected annually and a unit may have been vacant months before that point. Also, a business may be struggling for some time before closure and thus the survey would not reflect these difficult circumstances.

4.1.2 Vacancy rates in the borough's main town centres have dropped between 2013 and 2014 with the exception of Richmond town centre which has experienced a slight increase amounting to 1 net increase. They remain low compared to the national figure of 12.1% in 2014[4], averaging (for the 5 main centres) 6.2% in key shopping frontage, 6.3% in secondary shopping frontage, resulting in an overall figure for designated frontages of 6.3%. The table also presents the figures for the total vacancy rates for centres (including businesses in non-designated frontages), which reveal an overall vacancy rate of 6.5% for the 5 main town centres, which is noticeably lower than the previous year (7.8%). In 2014 there were 82 vacant units in the 5 main centres combined, compared to 99 in 2013 and 98 in 2012. Three years' positive figures may not be enough to suggest a sustained recovery, but are a good sign that vacancy levels are returning to post-recession levels. We should exercise some caution in drawing conclusions, particularly as vacancy rates are a slow indicator of change.

[4] NB figures for national vacancy rates will differ by data provider. This figure is the GOAD UK average.

Figure 3



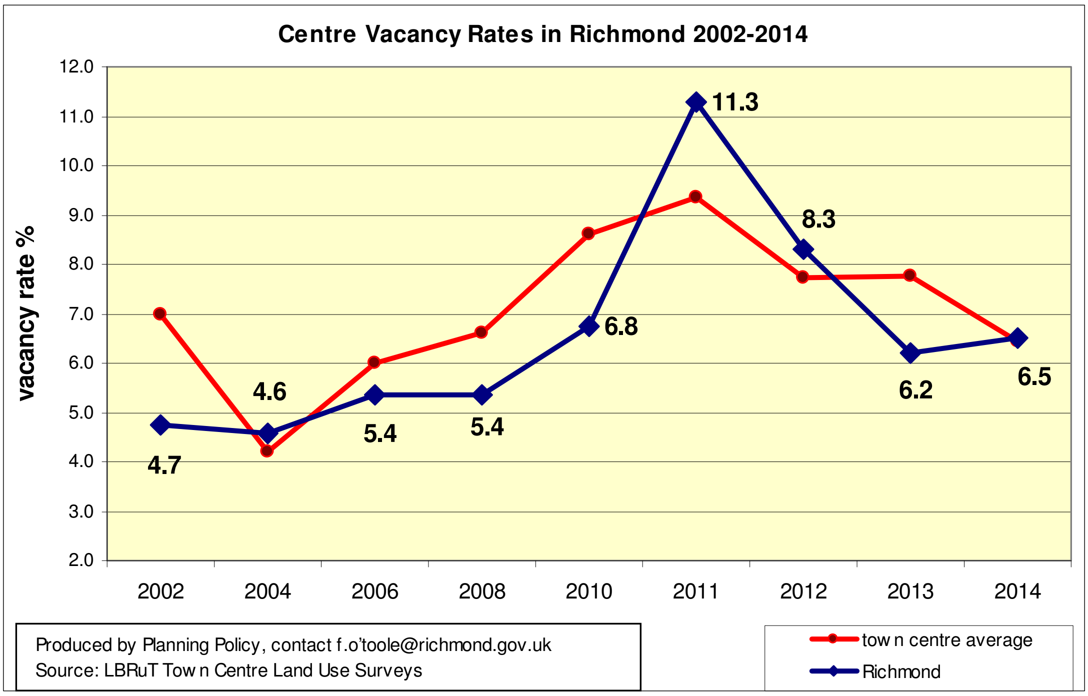
4.1.3 There are of course differences between centres. Teddington's vacancy rates have dropped again after a small increase between 2012 and 2013 and at 2.6% the rate is the lowest of the larger centres. The centre has 7 fewer vacancies than in 2013. Whitton's rates have also fallen again and along with East Sheen and Whitton is around the 6-7% mark.

4.1.4 Between 2012 and 2013 Twickenham experienced a discernible increase in vacancies, with 32 vacancies in the centre when surveyed. The number has now dropped back to 28. At 9.4% Twickenham's vacancy rate is noticeably higher than the other larger centres. Nevertheless, it remains below the national average of 12%.

4.1.5 Please see table below for a more detailed commentary on business closures and openings on a centre-by-centre basis.

Table 3: Business closures and new businesses in town centres since previous year (at time of survey).

town centre	
Richmond	Richmond's overall figures are similar to the previous year. In 2014 there were 23 vacant units in the centre resulting in a 6.5% vacancy rate, compared to 22 vacants in 2014 and a 6.2% rate in 2013.



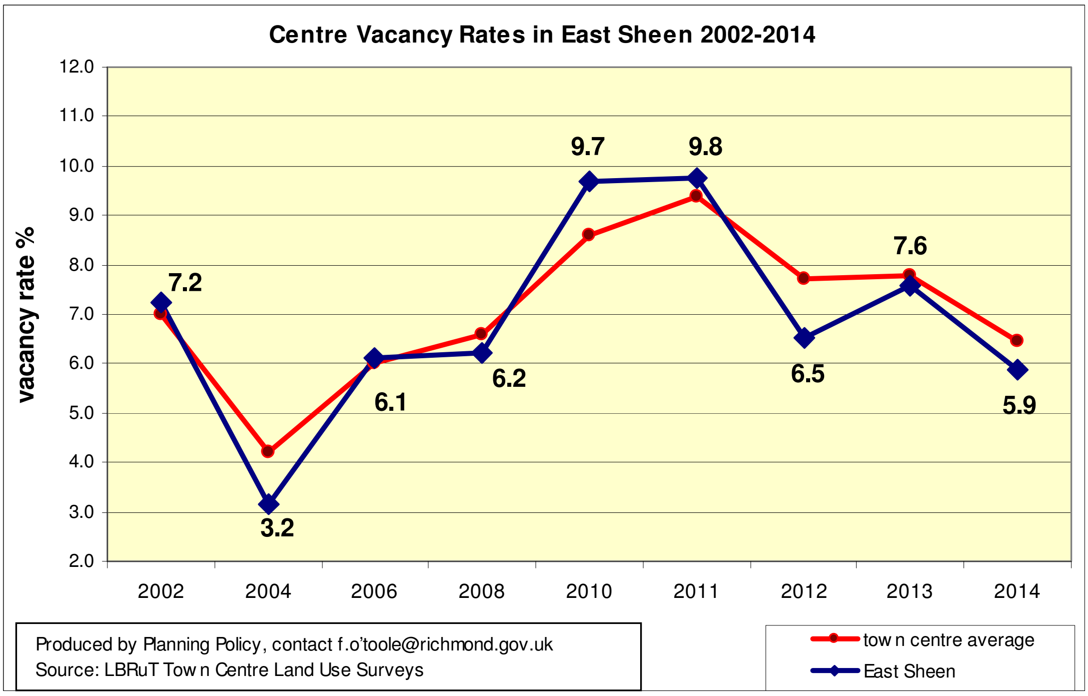
6 of these units are currently being refurbished – 3 of the 6 are for restaurants, not involving change of use.

Whilst several multiples have closed: Laura Ashley, Blacks, River Island, Dwell, Hobbs, Monsoon, Calvin Klein (a change of use to A2 on appeal); others have opened: Tiger, Greggs, Cos (in the former Dwell), Reebok, Wholefoods, Fired Earth.

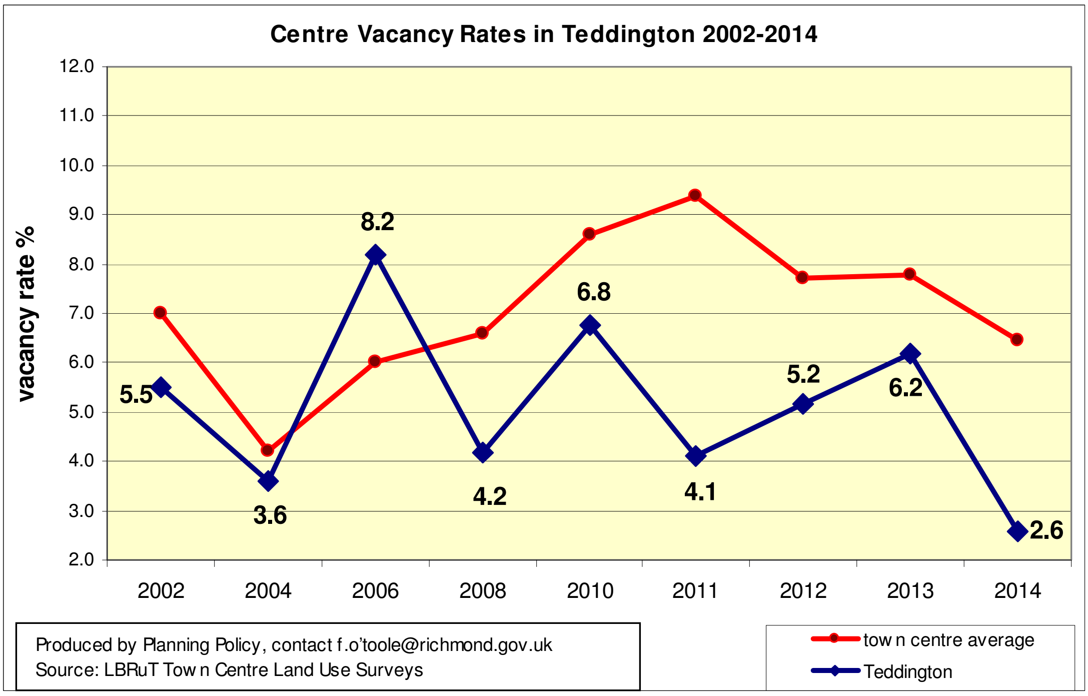
Of the two sizable vacant units in George St, the main shopping street, Laura Ashley is currently under refurbishment for Zara, and the River Island for the retailer Smiggle http://www.smiggle.co.uk/shop/en/smiggleuk

Many of the new retailers have existing representation in Kingston perhaps indicating that Richmond remains attractive to multiple retailers.

<table>
<tr>
<td>East Sheen</td>
<td>
East Sheen has experienced a noticeable drop in vacancies (5 in number) which is positive for the centre. The figures indicate a return to vacancy rates of the pre-recession period.



New businesses include: a number of new independent comparison retailers - Nula (Ladies Clothes), Sheen Living (gifts), Dibranto (Ironmongers/DIY), The Maternity Company; The Bakery, Threshers – adding to convenience provision along with 2 new cake shops (one opening shortly after the survey was undertaken), plus several new/ rebranded restaurants, and other services such as computer servicing, barbers & a tanning salon. In addition a couple of businesses have relocated within the centre, which is another positive sign.
</td>
</tr>
<tr>
<td>Teddington</td>
<td>
Vacancies remain extremely low at only 2.6%, the lowest it has been for over a decade. The number of vacant premises have dropped significantly since 2013. When surveyed Teddington had only 2 vacant shops and 5 vacant premises in total.
One notable addition to the retail provision is the opening of the Morrison's Local in Broad Street.



The only significant long term vacancies are 16-20 The Causeway and No 55 Broad St.
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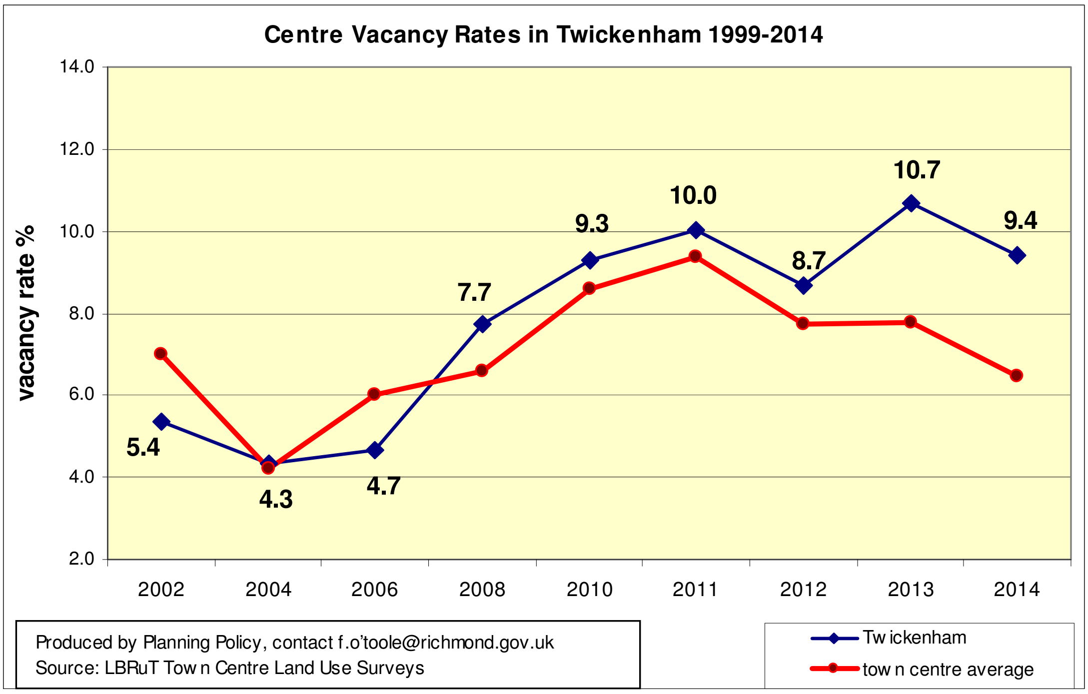
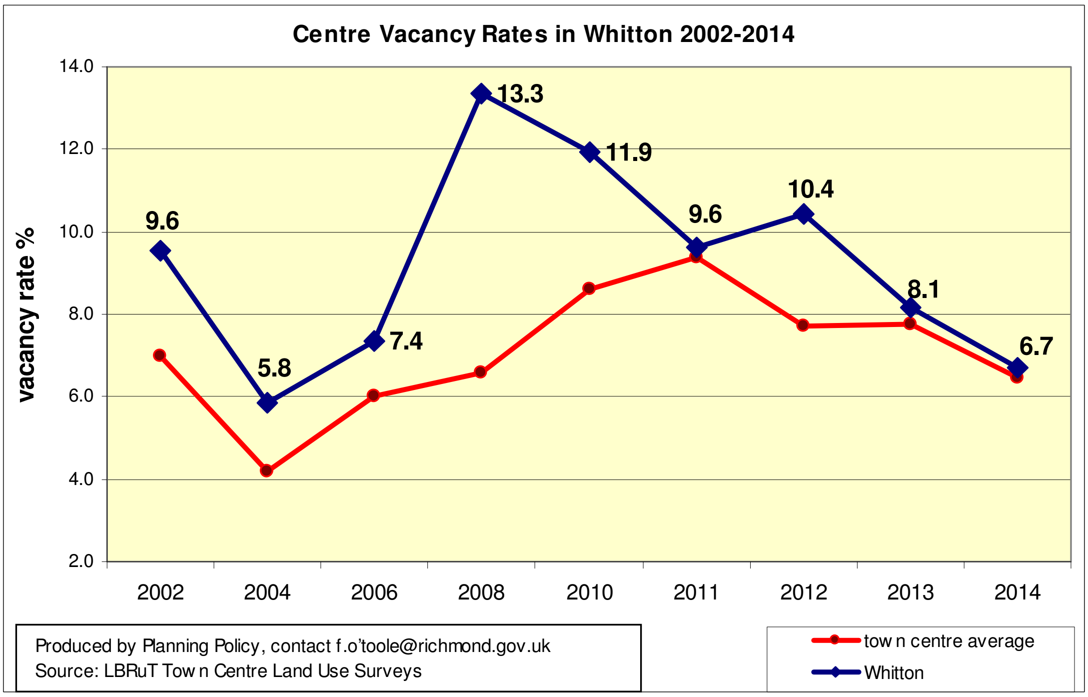
Twickenham	Twickenham's vacancy rate has dropped from 10.7 in 2013 to 9.4% in 2014. This is a decrease of 4 vacant units which is a positive sign. Twickenham has a shop vacancy rate of 14% which is high compared to other district centres. 21 of the 28 vacancies (75%) are shops.  New businesses opening in the centre include a toy store, ladies clothes, upholsterers, auction house and café, hairdresser, Hungarian deli, kitchen fitters, men's fashions', funeral directors and dry cleaners, a pop-up craft & design gallery. There are two new estate agents in York Street, one taking a large triple unit and another in a former pub.
Whitton	Whitton's rates have dropped again and are now in line with the average for the 5 main centres.  New businesses include retail services such as a hairdresser, computer repairs, funeral directors, designers/printers, and a betting shop. A new bakery has opened, as has a jewellers.

Source: Planning Policy Team.

*1 – long term vacant = a unit which was vacant at the 2010, 2011 and 2012 Surveys. In the vast majority of cases it is likely that the unit was continuously vacant over this period. However, since the Land Use Surveys are snapshot surveys it would not preclude a short-term let having opened and closed in the interim.

Table 3: Centre vacancy rates in the smaller centres

	key shopping frontage					secondary shopping frontage					all designated frontage					all frontage			
Local centres	2008	2010	2012	2013	2014	2008	2010	2012	2013	2014	2008	2010	2012	2013	2014	2011	2012	2013	2014
Barnes	11.5	17.7	6.5	**5.2**	**3.9**	0	3.6	11.1	0.0	**3.8**	8.5	14.0	7.7	3.9	**3.9**	8.6	6.3	4.7	**4.0**
East Twickenham	5.3	0	5.3	**5.3**	**10.5**	5.7	13.2	9.4	7.5	**9.4**	5.6	9.7	8.3	6.9	**9.7**	7.8	7.8	6.5	**9.1**
Hampton Hill*	0	4	3.6	**0.0**	**3.4**	4.3	4.3	4.3	4.3	**6.3**	2.8	2.9	4.0	2.7	**5.2**	7.8	7.0	6.2	**10.6**
Hampton Village	11.5	11.1	7.1	**3.6**	**0.0**	5	19.0	5.6	0.0	**5.6**	8.7	9.1	6.5	2.2	**2.2**	10.1	5.1	2.6	**2.5**
Ham Common	3.3	3.3	0.0	**0.0**	**6.7**	0	0	0	0	**0.0**	2.9	2.9	0.0	0.0	**5.9**	2.4	2.4	2.4	**7.0**
Kew Gardens Station	4.3	4.2	4.0	**4.0**	**4.0**	0	6.3	6.3	6.3	**6.3**	2.6	5.0	4.9	4.9	**4.9**	5.8	3.8	3.9	**3.9**
St Margarets	3.2	0	3.2	**3.2**	**3.2**	3.1	6.3	6.3	9.4	**6.3**	3.2	3.2	4.8	6.3	**4.8**	7.4	4.5	6.0	**4.5**
Average		8.5	4.6	**3.4**	**4.2**		8.5	7.0	5.1	**6.6**		8.5	5.7	4.1	**5.3**	7.7	5.7	**4.9**	**6.3**
neighbourhood centres																			
Castlenau	8.7	13.0	8.7	13.0	**8.7**	n/a	n/a	n/a	n/a		8.7	13.0	8.7	13.0	**8.7**	8.3	8.3	12.5	**8.3**
Friars Stile Road*	0.0	11.8	0.0	5.9	**0.0**	0.0	50.0	n/a	n/a		0.0	19.0	0.0	5.9	**0.0**	14.3	9.5	14.3	**5.0**
Hampton Wick*	9.1	0.0	0.0	14.3	**12.5**	n/a	n/a	n/a	n/a		9.1	0.0	0.0	14.3	**12.5**	20.0	23.6	22.2	**20.7**
Heathside	0.0	13.3	13.3	20.0	**0.0**	7.7	0.0	0.0	0.0	**0.0**	3.6	7.1	7.1	10.7	**0.0**	6.1	6.1	9.1	**0.0**
Sheen Road	11.1	11.1	11.1	0.0	**0.0**	0.0	0.0	25.0	0.0	**0.0**	6.3	6.3	17.6	0.0	**0.0**	4.9	11.9	4.9	**4.7**
Kingston Road	6.7	13.3	6.7	0.0	**6.7**	0.0	16.7	16.7	0.0	**0.0**	4.8	14.3	9.5	0.0	**4.8**	14.3	9.5	0.0	**4.8**
Stanley Road	4.5	9.5	4.8	4.8	**0.0**	7.1	14.3	13.3	13.3	**13.3**	5.6	11.4	8.3	8.3	**5.6**	6.7	6.7	8.9	**4.4**
White Hart Lane	9.5	9.1	4.5	4.5	**9.1**	0.0	9.5	9.5	9.5	**4.8**	4.8	9.3	7.0	7.0	**7.0**	11.9	8.5	8.3	**8.3**
Average		10.5	**6.2**	**7.8**	**4.7**		10.8	11.3	6.5	**4.8**		10.6	7.9	**4.1**	**4.7**	11.0	11.4	**10.7**	**8.2**
local parades																			
Ashburnham Road	0.0	0.0	0.0	0.0	**0.0**	n/a	n/a	n/a	n/a	**n/a**	0.0	0.0	0.0	0.0	**0.0**	0.0	0.0	0.0	**0.0**
Fulwell	22.2	22.2	11.1	0.0	**0.0**	n/a	n/a	n/a	n/a	**n/a**	22.2	22.2	11.1	0.0	**0.0**	25.0	16.7	0.0	**0.0**
Ham Street / Back Lane	23.1	0.0	7.7	7.7	**9.1**	0.0	40.0	25.0	0.0	**0.0**	17.6	11.1	11.8	5.9	**6.7**	5.6	11.1	5.6	**6.3**
Hampton Nursery Lands	0.0	0.0	0.0	0.0	**0.0**	n/a	n/a	n/a	n/a	**n/a**	0.0	0.0	0.0	0.0	**0.0**	0.0	0.0	0.0	**0.0**
Hospital Bridge Road	0.0	16.7	0.0	0.0	**0.0**	n/a	n/a	n/a	n/a	**n/a**	0.0	16.7	0	0.0	**0.0**	16.7	0.0	0.0	**0.0**
Kew Green	11.1	11.1	12.5	12.5	**12.5**	n/a	n/a	n/a	n/a	**n/a**	11.1	11.1	12.5	12.5	**12.5**	5.6	11.1	11.1	**5.3**
Kew Road	n/a	n/a	n/a	n/a	**n/a**	7.1	3.6	7.1	6.9	**3.4**	7.1	3.6	7.1	6.9	**3.4**	5.9	8.8	5.7	**2.9**
Lower Mortlake Road	9.1	9.1	9.1	0.0	**0.0**	0.0	0.0	0.0	0.0	**0.0**	8.3	8.3	8.3	0.0	**0.0**	5.6	5.9	0.0	**0.0**
Nelson Road	9.1	27.3	27.3	27.3	**18.2**	n/a	n/a	n/a	n/a	**n/a**	9.1	27.3	27.3	27.3	**18.2**	27.3	27.3	27.3	**18.2**
Sandycombe Road	16.7	16.7	0.0	0.0	**0.0**	0.0	16.7	0.0	0.0	**0.0**	8.3	16.7	0	0.0	**0.0**	9.5	7.0	4.7	**7.0**
Strawberry Hill	14.3	14.3	7.1	14.3	**14.3**	n/a	n/a	n/a	n/a	**n/a**	14.3	14.3	7.1	14.3	**14.3**	21.4	7.1	14.3	**14.3**
Twickenham Green	11.8	17.6	27.8	16.7	**22.2**	n/a	n/a	n/a	n/a	**n/a**	11.8	17.6	27.8	16.7	**22.2**	19.0	16.7	14.3	**23.8**
Waldegrave Road	10.0	10.0	10.0	20.0	**20.0**	0.0	0.0	0.0	0.0	**0.0**	7.1	7.1	7.1	14.3	**14.3**	13.3	13.3	13.3	**13.3**
St Margarets Road	n/a	n/a	n/a	n/a	**n/a**	25.0	25.0	25.0	25.0	**25.0**	25.0	25.0	25	25.0	**25.0**	27.3	27.3	27.3	**27.3**
Whitton Road	16.7	16.7	0.0	0.0	**0.0**	n/a	n/a	0.0	0.0	**0.0**	16.7	22.2	0.0	0.0	**0.0**	18.8	6.7	6.7	**0.0**
Average		12.9	11.2	9.7	**9.8**		11.5	9.6	7.7	**5.8**		12.5	10.7	9.0	**8.6**	12.7	10.9	**8.7**	**9.0**

Source: LBRuT Town Centre Land Use Surveys.

Note to Table:
Red indicates an increase in the rate between 2013 and 2014, black no change, and **blue** an fall in the rate.

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

4.1.6 Average vacancy rates in local & neighbourhood centres and local parades were all significantly lower than the national average. The picture is slightly mixed in that on average rates have fallen in neighbourhood centres, remained essentially the same for local parades (very small increase of 1 vacancy), but have risen for the larger local centres.

4.1.7 Amongst the local centres Hampton Hill, Ham Common and East Twickenham have experienced an increase in vacancy rates. Hampton Hill and East Twickenham have the highest vacancy rates amongst the local centres (10.6% and 9.1% respectively) and the former has experienced a noticeable increase in vacancies in particular (an overall net increase of 6). Only half of the vacancies in this centre are shops. Recent closures including a range of land uses.

4.1.8 Amongst the local parades Twickenham Green is the only centre which has experienced a notable increase in vacancy levels. When surveyed, only 4 of the 10 vacancies were shops.

4.1.9 For neighbourhood centres, the picture is much more positive. In fact only Kingston Road has an increase in rates and this by only 1 unit.

Table 4: Commentary for Local and neighbourhood centres and local parades

local centre	
Barnes	Vacancies have dropped slightly since 2013, and only 1 of the 5 vacancies was a shop. There are no long term vacancies.
East Twickenham	Although there has been no change in the number of vacant shops, the total number of vacancies has risen slightly.
Hampton Hill	Vacancy levels have noticeably increased from last year, the rate having risen from 6.2% in 2013 to a relatively high 10.6%. Although the number of vacant shops has risen since last year (from 5 to 7), they make up only half of the vacancies in the centre as a whole. Closures in the last year include: Barclays bank, estate agent & office space, a deli/café, gift chop and car hire.
Hampton Village	Hampton Village has only 2 vacancies, one of which is a newbuild which is as yet unoccupied. There has been very little change in this healthy centre.
Ham Common	There has been some change in the businesses represented in Ham Common over the last year. Barclays bank has closed which is believed to be the proposed site of a new Sainsburys Local. A new hairdresser replaces the former gift shop, and indeed another gift shop has closed in the centre. The florists at No. 23 has also closed. Elsewhere a physiotherapist has opened. Vacancies have increased in number (from 1 to 3) but from a very low base.
Kew Gardens Station	In terms of vacancies, not a great deal of change in the centre itself. Two long term vacants neither of which are shops.
St Margarets	Change in the last year has generally been positive in St Margarets with fewer vacancies in the centre and a number of new businesses opening: a sash window retailer, estate agent, thrift shop, and coffee shop. Closures include a haberdashers and soft furnishing retailer.
neighbourhood centre	
Castelnau	Vacancy rates have dropped slightly as one vacant unit is now occupied by an estate agent in a former sui generis use.
Friars Stile Road	Vacancy rates have dropped slightly as a restaurant and art gallery have opened since last year. Only one vacant unit (the former PO) now remains, located in non-designated frontage where there is scope for a change of use.
Hampton Wick	Hampton Wick remains the centre with by far the highest number of vacancies (12 in number). 8 of these have been vacant for at least 2 years. The overall number of vacancies remains unchanged since last year. Just less than half of the vacancies are vacant shops (A1 use class). However, the centre has attracted a number of new retailers in recent years, most recently a bridalwear shop.
Heathside	There were no vacancies at the time of the survey, with 3 new businesses opening up in vacant units: 2 new hairdressers and a convenience store/cash & carry.
Sheen Road	Very little change has occurred since last year. There are no new vacancies and the two vacant units remain (one a vacant A2 and the other former use is not known).
Kingston Road	A florist has closed in Kingston Rd centre, and this is the only change since 2013.
Stanley Road	Vacancies remain low in Stanley Road. Two new businesses have opened since last year, one being the 6th branch of the Cavan bakery (Jan 14).
White Hart Lane	Overall the number of shops in the centre has not changed since 2013. It has 5 vacancies, all of which are vacant shops/retail service.
local parades	
Ashburnham Road	No change
Fulwell	No change. Fulwell remains fully occupied.
Ham Street / Back Lane	No change. The centre retains one vacancy.
Hampton Nursery Lands	No change. The centre remains fully occupied.
Hospital Bridge Rd	No change. The centre remains fully occupied.
Kew Green	Two previously vacant units have been occupied. The dry cleaners has closed. So overall a net improvement.
Kew Road	A new nail salon has opened in the centre in a formerly vacant unit. There is only one vacancy in the centre, which has been vacant for 2 years or more.
Lower Mortlake Road	Lower Mortlake Road now has a new bathroom showroom (a redevelopment), but otherwise there is no change from last year. There are no vacancies.
Nelson Road	The centre retains 2 vacancies. However, one vacant unit has been occupied by a new barbers shop since the last survey.
Sandycombe Road	Vacancies have increased from 2 to 3. This parade has a new antiques shop but a lighting shop and car showroom have closed.
Strawberry Hill	No change. The two vacant units remain unfilled.
Twickenham Green	There has been a noticeable increase in vacant units in this centre. It now has a total of 10 vacant units compared to 6 the previous year. However, only 4 of which are vacant shops (compared to 3 in 2013). The centre has lost a convenience store in the last year. It retains a Sainsburys Local.
Waldegrave Road	There are 2 vacancies in this small centre. One is a new vacancy resulting from the closure of the evening wear hire/shop.
St Margarets Road	No net gain or loss. Three vacant units remain, all of which were former shops/retail services.
Whitton Road	This small centre on the edge of Twickenham district centre is fully occupied.

Source: LBRuT Town Centre Land Use Centre 2014

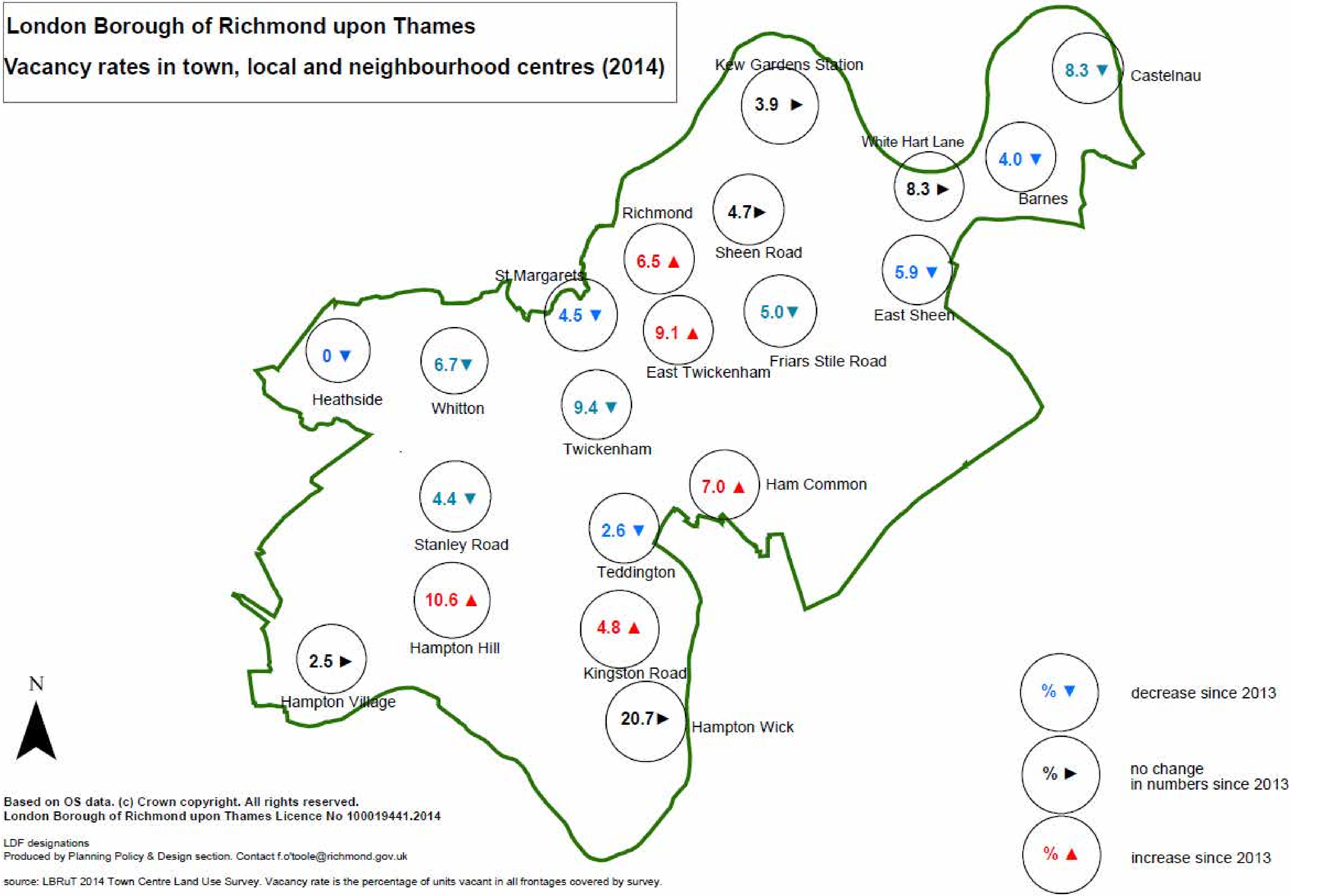
Overall figures:

The total number of vacant outlets in **designated frontages** is as follows: 67 in town centres (79 in 2013, 82 in 2012, 96 in 2011), 23 in local centres (18 in 2013, 25 in 2012, 33 in 2011), 9 in neighbourhood centres (14 in 2013, 15 in 2012, 16 in 2011), and 15 in local parades (16 in 2013, 19 in 2012, 25 in 2011).

The overall figure is 114 vacant outlets in designated frontages compared to 127 in the previous year and 141 in 2013,170 in 2011 and 163 in 2010. This represents a borough vacancy rate in designated frontages of 6.1%, compared to 6.8% last year, 7.5% in 2013, 9.0% in 2011 and 8.7% in 2010. This appears to show a positive trend of falling vacancy rates in designated frontages.

The corresponding figures for **all frontages** shows an emerging trend, with a further decline in the “borough vacancy rate” to 6.1% in 2014, compared to 6.9% in 2013, 7.6% in 2013, 8.0% in 2012 and 9.5% in 2011. **The total number of vacancies fell again to 168 in 2014** a further fall from 185 in 2013, 194 in 2012 and 231 in 2011.

The Land Use Survey is a snapshot survey, generally undertaken in the summer and therefore the data may have changed since the survey was carried out. However**, the number of vacant units boroughwide has fallen noticeably over the last three years.**


London Borough of Richmond upon Thames
Vacancy rates in town, local and neighbourhood centres (2014)
Kew Gardens Station
3.9
Castelnau
8.3
White Hart Lane
8.3
4.0
Barnes
Richmond
4.7
Sheen Road
6.5
5.9
East Sheen
St Margarets
4.5
9.1
5.0
Friars Stile Road
East Twickenham
0
Heathside
6.7
Whitton
9.4
Twickenham
7.0
Ham Common
4.4
Stanley Road
2.6
Teddington
10.6
Hampton Hill
4.8
Kingston Road
2.5
Hampton Village
20.7
Hampton Wick
N
%
decrease since 2013
no change
in numbers since 2013
increase since 2013
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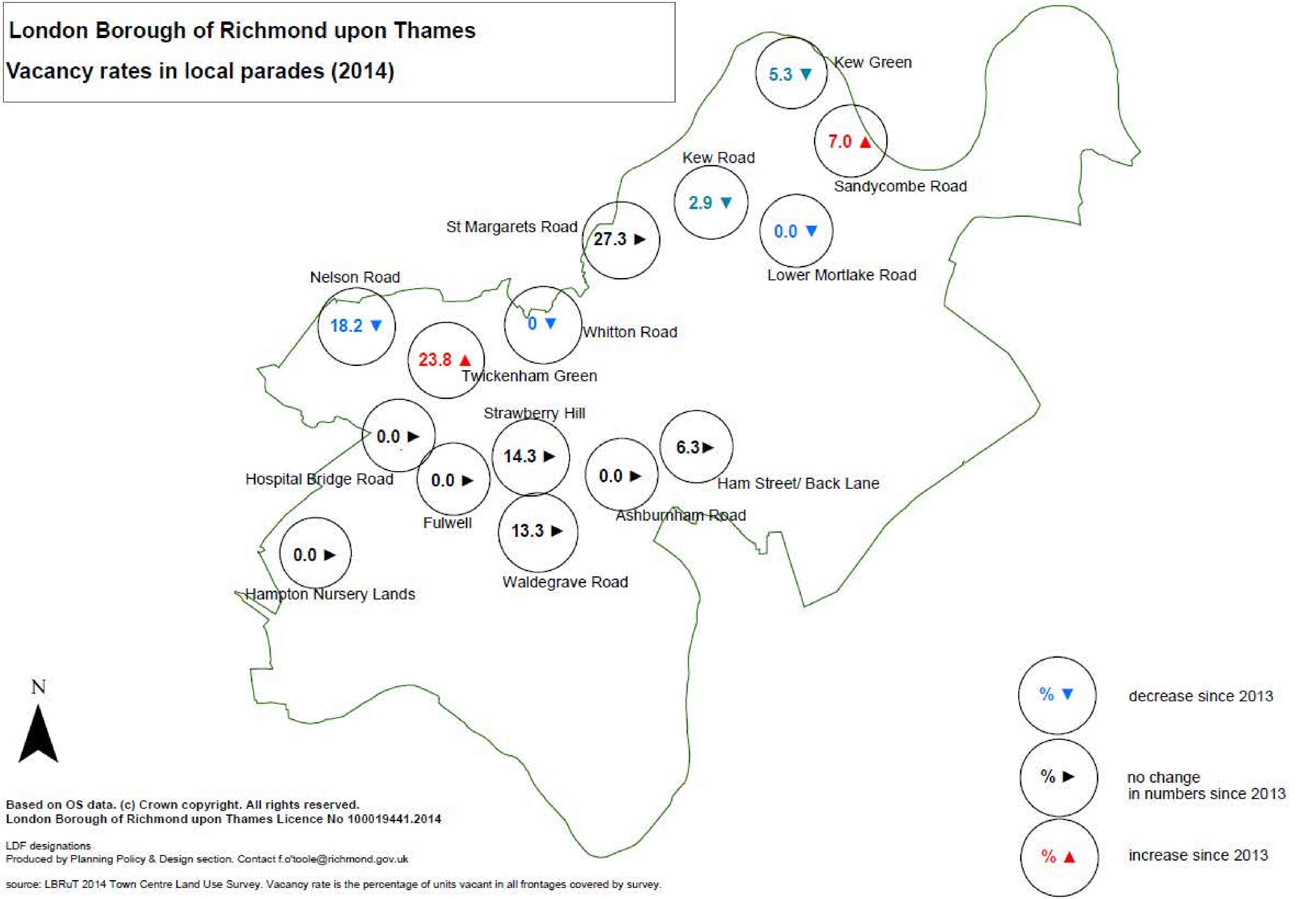
LDF designations
Produced by Planning Policy & Design section. Contact f.o'toole@richmond.gov.uk
source: LBRuT 2014 Town Centre Land Use Survey. Vacancy rate is the percentage of units vacant in all frontages covered by survey.



LDF designations
Produced by Planning Policy & Design section. Contact f.o'toole@richmond.gov.uk

source: LBRuT 2014 Town Centre Land Use Survey. Vacancy rate is the percentage of units vacant in all frontages covered by survey.

LONDON BOROUGH OF RICHMOND UPON THAMES

4.2 Shop Vacancy Rates

4.2.1 This section of the report provides statistics on vacant shops specifically, in order to provide information on the health of the retail sector in the borough. This is in part a response to national concerns that the 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 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 a quick or responsive as an indicator of change.

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

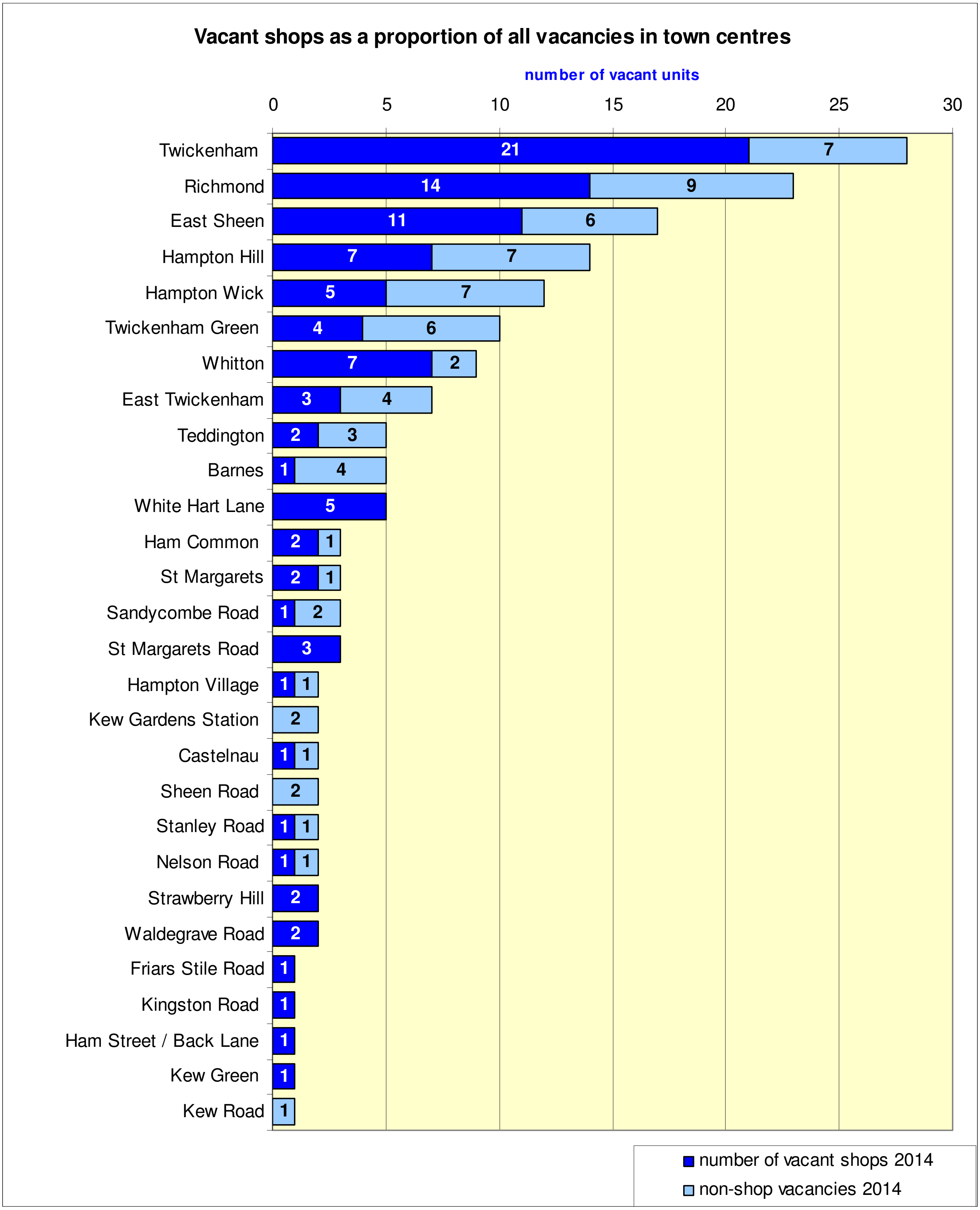
centres & parades in the borough hierarchy	2014			2013			2012		Actual change between 2013 & 2014 surveys	
	vacant shops	% vacant shops	% of vacancies which are shops	vacant shops	% shops which are vacant	% of vacancies which are shops	vacant shops	% vacant shops	actual change in all vacancies	actual change in vacant shops
town centres (5 main)										
Richmond	14	6.6	60.9	13	6.0	59.1	22	10.1	1	1
East Sheen	11	6.5	64.7	16	9.6	72.7	14	8.4	**-5**	**-5**
Teddington	2	1.8	40.0	5	4.5	41.7	4	3.6	**-7**	**-3**
Twickenham	21	14.2	75.0	22	14.5	68.8	16	10.5	**-4**	**-1**
Whitton	7	9.7	77.8	8	10.5	72.7	10	13.2	**-2**	**-1**
town centre total	**55**	**7.7**	**67.1**	64	**8.9**		66		**-17**	**-9**
local centres										
Barnes	**1**	1.4	20.0	4	5.7	66.7	7	10.0	-1	-3
East Twickenham	**3**	6.5	42.9	3	6.4	60.0	4	8.5	2	0
Hampton Hill	**7**	12.3	50.0	5	7.7	62.5	5	7.7	6	2
Hampton Village	**1**	2.3	50.0	1	2.3	50.0	2	4.5	0	0
Ham Common	**2**	8.7	66.7	0	0.0	0.0	0	0.0	2	2
Kew Gardens Station	**0**	0.0	0.0	0	0.0	0.0	0	0.0	0	0
St Margarets	**2**	5.1	66.7	2	5.3	50.0	2	5.3	-1	0
local centre total	**16**	**5.3**	**44.4**	15			20		**8**	**1**
neighbourhood centres										
Castelnau	**1**	9.1	**50.0**	2	18.2	66.7	1	9.1	-1	**-1**
Friars Stile Road	**1**	8.3	**100.0**	2	14.3	66.7	2	14.3	-2	**-1**
Hampton Wick*	**5**	26.3	**41.7**	7	38.9	50.0	6	27.8	0	**-2**
Heathside	**0**	0.0	**0.0**	3	17.6	100.0	2	11.8	-3	**-3**
Sheen Road	**0**	0.0	**0.0**	0	0.0	0.0	3	15.8	0	**0**
Kingston Road	**1**	7.7	**100.0**	0	0.0	0.0	2	13.3	1	**1**
Stanley Road	**1**	4.0	**50.0**	3	13.0	75.0	2	8.7	-2	**-2**
White Hart Lane	**5**	16.7	**100.0**	4	12.9	80.0	4	12.9	0	**1**
neighbourhood centre total	**14**	**9.3**	**56.0**	21			21		**-7**	**-7**

LONDON BOROUGH OF RICHMOND UPON THAMES

centres & parades in the borough hierarchy	2014			2013			2012		Actual change between 2012 & 2013 surveys	
	vacant shops	% vacant shops	% of vacancies which are shops	vacant shops	% vacant shops	% of vacancies which are shops	vacant shops	% vacant shops	actual change in all vacancies	actual change in vacant shops
local parades										
Ashburnham Road	**0**	**0.0**	**-**	0	0.0	0.0	0	0.0	**0**	**0**
Fulwell	**0**	**0.0**	**-**	0	0.0	0.0	1	16.7	**0**	**0**
Ham Street / Back Lane	**1**	**12.5**	**100**	1	11.1	100.0	2	22.2	**0**	**0**
Hampton Nursery Lands	**0**	**0.0**	**-**	0	0.0	0.0	0	0.0	**0**	**0**
Hospital Bridge Road	**0**	**0.0**	**-**	0	0.0	0.0	0	0.0	**0**	**0**
Kew Green	**1**	**11.1**	**100**	2	18.2	100.0	2	18.2	**-1**	**-1**
Kew Road	**0**	**0.0**	**0**	1	6.3	50.0	1	6.3	**-1**	**-1**
Lower Mortlake Road	**0**	**0.0**	**-**	0	0.0	0.0	1	10.0	**0**	**0**
Nelson Road	**1**	**14.3**	**50**	2	33.3	66.7	2	33.3	**-1**	**-1**
Sandycombe Road	**1**	**6.3**	**33.3**	1	5.9	50.0	1	5.9	**1**	**0**
Strawberry Hill	**2**	**28.6**	**100**	2	28.6	100.0	1	14.3	**0**	**0**
Twickenham Green	**4**	**25.0**	**40**	3	16.7	50.0	4	22.2	**4**	**1**
Waldegrave Road	**2**	**25.0**	**100**	1	11.1	50.0	0	0.0	**0**	**1**
St Margarets Road	**3**	**75.0**	**100**	3	75.0	100.0	3	75.0	**0**	**0**
Whitton Road	**0**	**0.0**	**-**	0	0.0	0.0	0	0.0	**-1**	**0**
local parade total	**15**	**11.7**	**60.0**	16			18		**1**	**-1**

Source: LBRuT Annual Town Centre Land Use Surveys. Produced by Planning Policy Section.
Shops = Businesses falling within the A1 Use class which also includes some services such as Post Offices, dry cleaners, ticket offices.

The figures in the table are net gains/ losses. There will be some natural change within centres, with some retailers closing and others opening.

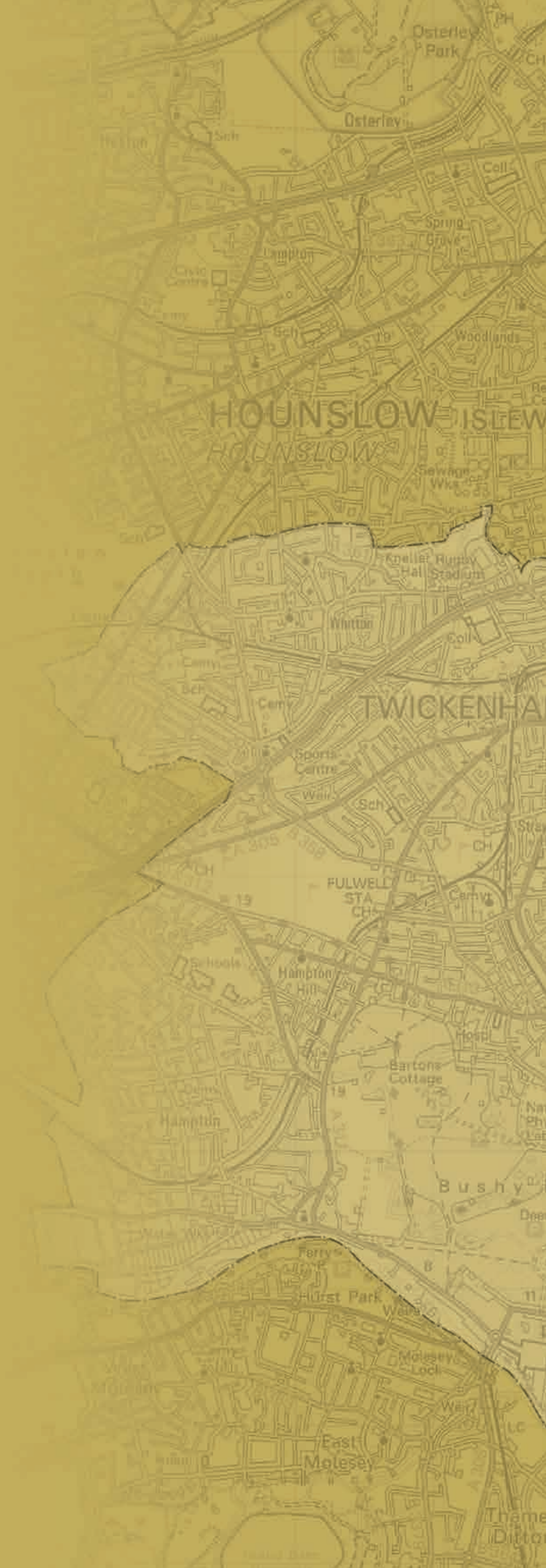


Vacant shops have been analysed in 2012, 2013 and 2014. Each year the numbers have declined: from 125 in 2012, to 116 in 2013 and again to 100 in 2014. In 2013 some 8.8% of shops were vacant. **The borough wide shop vacancy rate fell to 7.7% in 2014.** Just over half of vacant shops are in the 5 main town centres. Twickenham has discernibly more vacant shops than the other main centres, but with the exception of Richmond which has one more vacant shop than in 2013, all the district centres have fewer vacant shops than last year.

Amongst the smaller centres the increase in shop vacancies has been marginal with an overall decline in vacant shops.

In both 2013 and 2014 approximately 60% of all vacancies in the borough are vacant shops or retail services (within the A1 use class). **Therefore a significant number of vacant units in the borough are not vacant shops illustrating it is not just retailers who are operating in challenging conditions.**

Overall the picture is positive with a fall in shop vacancies in the majority of centres, and overall decline in total numbers of vacancies for the third year running since monitoring began.



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