

2022 Town Centre Land Use Survey

Planning

17 July 2023

Local Plan Monitoring Report

2022 Centre Land Use Survey

Richmond upon Thames

July 2023

Contents

1. Summary	3
2. Introduction.....	3
3. Structural changes to retailing	3
4. Changes to permitted development rights	4
5. Introduction of combined business class:	5
6. Methodology.....	6
7. The Borough's centres	7
9. Summary of Vacancies.....	9
10. Centre Vacancy Rates.....	10
12. Town Centre Vacancy Rates	12
13. Town Centre Retail Categories.....	13
14. Town Centre vacancy rates	14
15. Richmond Town Centre – Headline results.....	19
16. Richmond Town Centre – Retail Categories	20
17. Twickenham – Headline results	21
18. Twickenham – Retail Categories	22
19. Teddington – Headline results	23
20. Teddington – Retail Categories	24
21. East Sheen – Headline results.....	25
22. East Sheen – Retail Categories.....	26
23. Whitton – Headline results.....	27
24. Whitton – Retail Categories	28
25. Local Centre vacancy rates	29
26. Local Centre retail categories	30
27. Neighbourhood Centre vacancy rates.....	31
28. Neighbourhood Centre retail categories	31
29. Local Parades vacancy rates.....	32

1. Summary

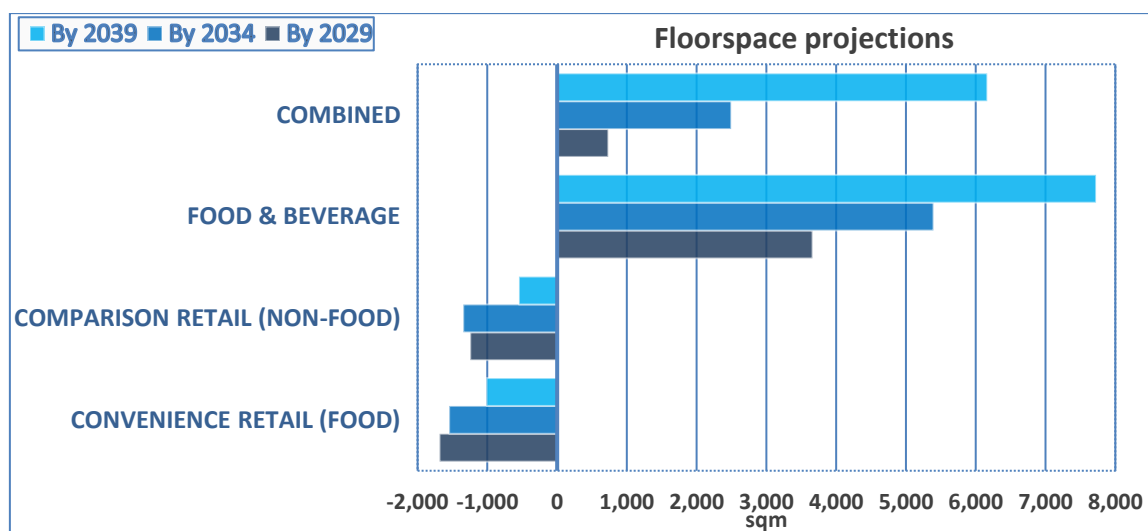
The town centre land use survey took place between and 10th October and 4th November 2022. The survey includes all businesses in designated shopping frontages in the borough. Units being refurbished or redeveloped are included in the vacancy count. Following the introduction of the combined planning 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. Introduction

1. Surveys of all the Town Centres, Local Centres, Neighbourhood Centres, and Important Local Parades have been carried out in the London Borough of Richmond upon Thames since the late 1990s. 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 previous 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 research¹ forecasts a surplus of retail floorspace going forward, with rising demand for Food & Beverage floorspace. By 2034 the overall requirement is fairly modest, at around 2,500m². The emphasis will be on re-purposing retail floorspace. It is recognised that the pandemic has changed the retail sector, accelerating existing trends with an increased demand for internet shopping particularly for home deliveries. 2039 forecasts should be treated with a degree of caution.



2. 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.
3. Further information on centres in the borough hierarchy can be found in the Assessment of Borough Centres 2023 report on the Council's website²

¹ https://www.richmond.gov.uk/media/28086/retail_and_leisure_study_phase_2.pdf

² https://www.richmond.gov.uk/services/planning/planning_policy/local_plan/local_plan_evidence/towns_retail_leisure_research

4. Changes to permitted development rights

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. 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 (Permitted Development) 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 ³ .
	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.
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 2020⁴	<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, 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>
Came into force August 2021	A new Permitted Development right introducing change of use from Class E to residential. There are exceptions including Listed Buildings. ⁵

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

³ 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.

⁴ <https://www.gov.uk/guidance/ensuring-the-vitality-of-town-centres>

⁵ <https://www.planningportal.co.uk/permission/responsibilities/planning-permission/permitted-development-rights>

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 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.

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).⁶

- 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

Since this change in legislation an Article 4 Direction⁷ was made on 21st June 2022 to remove permitted development rights regarding the change of use from class E use to C3 use (dwellinghouses). The effect of the Direction means that a change of use from a commercial, business and service use to residential in certain locations would require planning permission and will be assessed against Local Plan policies. This Direction has been modified by the Secretary of State, working with Council officers. It came into force on 29 July 2022 and covers 62 areas across the borough where the main concentrations of commercial and business uses are located, including industrial estates and business parks. They include areas within the five town centres, local and neighbourhood centres, and local parades.

⁶ https://www.planningportal.co.uk/info/200130/common_projects/9/change_of_use

⁷ https://www.richmond.gov.uk/services/planning/conservation_and_urban_design/conservation_areas/article_4_directions

6. Methodology

1. This Monitoring Report is one of several publications which assess the effectiveness of planning policies in the borough. Reports are published in a phased approach on the Council's website⁸.
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 Classes Order, however following the amalgamation of use classes in September 2020, this report builds on the methodology used in previous reports, categorising land uses into Convenience, Durables and Service categories. Details of the predominant uses in each Retail Category are described in the Table 2 below. The predominant use in some units may be unclear. 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.

⁸ http://www.richmond.gov.uk/home/services/planning/planning_policy/local_plan/authority_monitoring_report.htm

7. The Borough's centres

Table 1: Adopted Local Plan 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. Please note that the Publication Plan (Regulation 19 Plan) includes an amendment to the hierarchy with Twickenham Green being promoted to a neighbourhood centre⁹

⁹ https://www.richmond.gov.uk/services/planning/planning_policy/local_plan/draft_local_plan

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 decreased following the high number of vacancies recorded in 2021, and the vacancy rate is only slightly above the ten-year average. The largest decreases in vacancy rates have been in the Town Centres, while the local centres and local parades have seen a slight fall and there has been a slight increase in vacancies in the neighbourhood centres. Table 3 below shows that the total number of vacancies in **all frontages** has decreased by 14 units since 2021 from 220 to 206.
3. The main town centres have seen a decrease of 25 units compared to 2021, which is the first fall in vacancies seen since 2016. The local centres have seen a slight decrease from 34 to 32 vacant units. The neighbourhood centres have increased from 12 vacant units in 2021 to 16 in 2022, and local parades have fallen slightly by 2 units in 2021 to 15 units in 2022.
4. Richmond Town Centre saw the largest decrease of the town centres with 16 fewer vacant units compared to 2021. East Sheen saw a decrease of 8 units and Whitton a decrease of 4 units. Twickenham saw an increase of 1 unit and Teddington increased by 3 vacant units compared to 2021.
5. At 7.7% the borough centre vacancy rate in designated frontages¹⁰ has fallen from the high vacancy rates of 9% in 2021 and 8.2% in 2020 and is slightly higher than the 7.4% seen in 2019.

Table 3: Summary Table: All vacancies

In designated shopping frontages: ^[1]	2012	2013	2014	2015	2016	2017	2019	2020	2021	2022	Average
total number of vacancies	141	127	114	125	91	106	137	155	169	144	131
town centres	82	79	67	65	58	61	76	95	106	81	77
local centres	25	18	23	30	13	24	25	36	34	32	26
neighbourhood centres	15	14	9	19	9	9	15	9	12	16	13
local parades	19	16	15	11	11	12	21	15	17	15	15
Vacancy rate (%)	7.5	6.8	6.1	6.7	4.9	5.7	7.4	8.2	9.0	7.7	7

In all frontages:	2012	2013	2014	2015	2016	2017	2019	2020	2021	2022	Average
Total number of vacancies	195	183	168	186	133	163	200	205	220	206	186
Vacancy rate (%)	8.1	7.6	6.9	7.7	5.5	6.6	8.1	8.4	8.9	8.4	7.5

¹⁰ 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 decreased slightly with 206 vacant units, compared to 220 in 2021. This follows the previous 5 years when the vacancy rate increased each year from the lowest rate recorded of 5.5% in 2016.
- At 8.4% the borough centre vacancy rate in designated frontages¹¹ continues to be low and remains well below the national average of around 14%.¹²

Boroughwide Centre Vacancy Rate (All designated frontages)

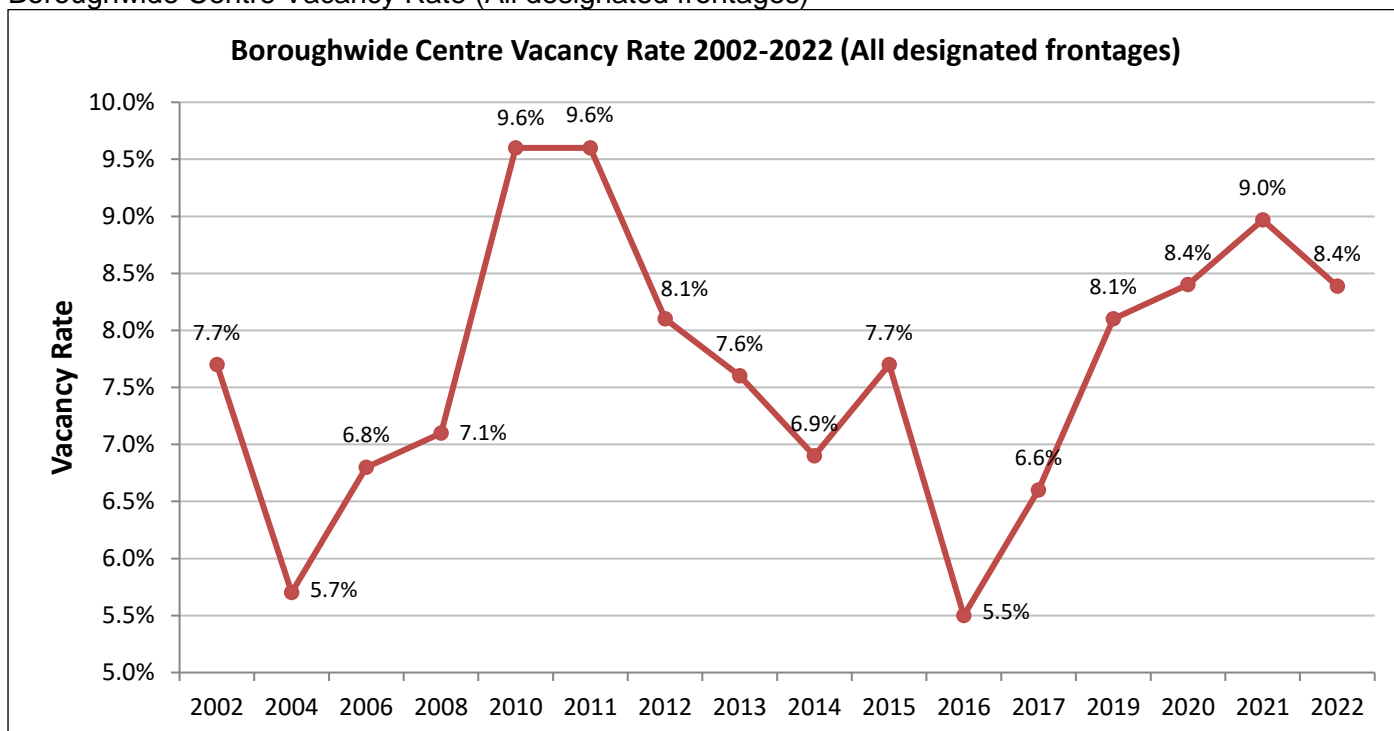


Table 4: Boroughwide Centre Vacancy Rate (All designated frontages) 2012 - 2022

Year	2012	2013	2014	2015	2016	2017	2019	2020	2021	2022
Vacancy Rate	8.1%	7.6%	6.9%	7.7%	5.5%	6.6%	8.1%	8.4%	9%	8.4%

¹¹ Designated frontages as classified in the Local Plan adopted 2018. See Appendix 4 and Policies Map.

¹² <https://brc.org.uk/news/corporate-affairs/glimmer-of-hope-for-vacancy-rate/>

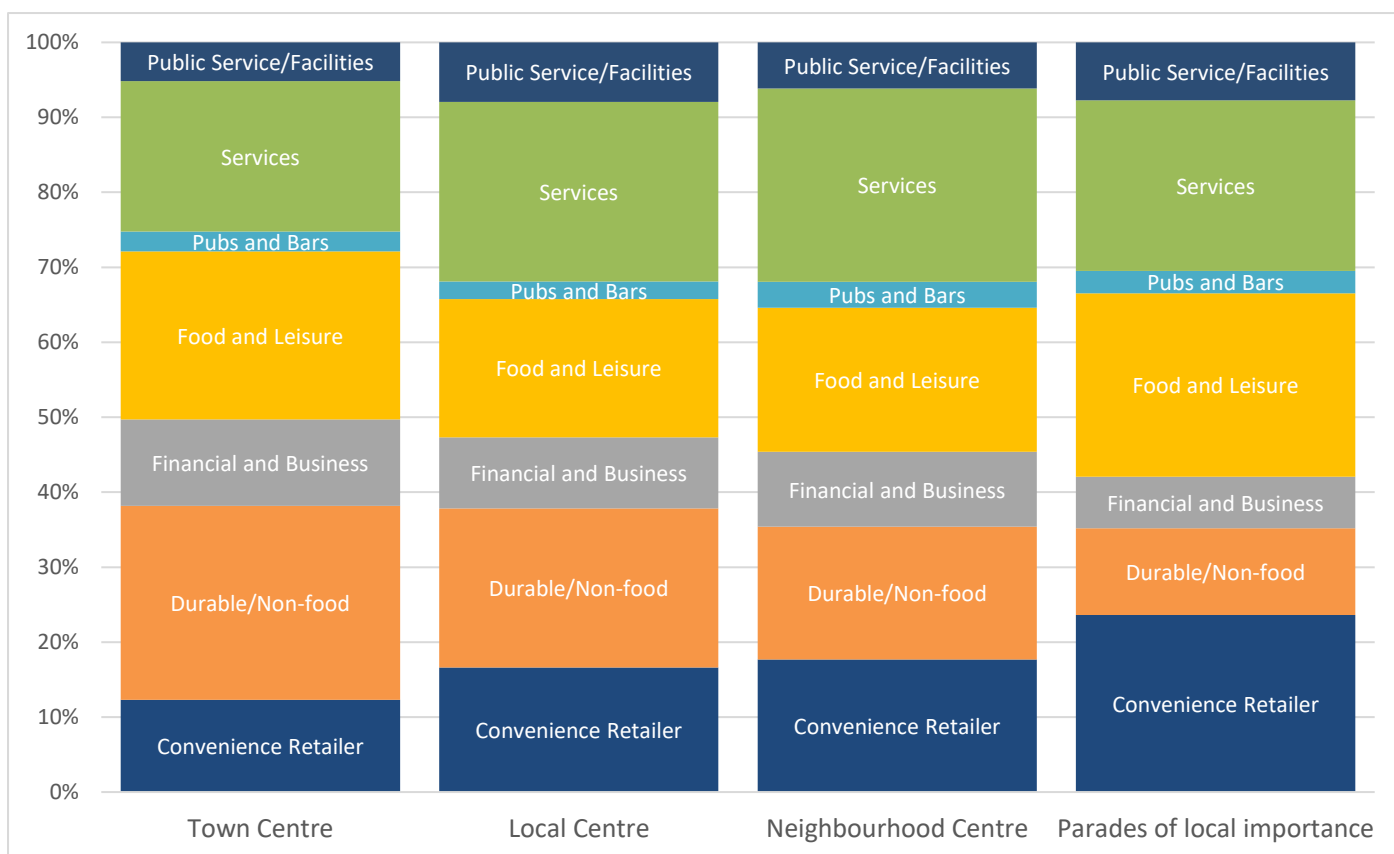
11. Retail Categories by Frontage

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 Centre	12%	20%	26%	12%	22%	3%	5%
Local Centre	17%	24%	21%	10%	18%	2%	8%
Neighbourhood Centre	18%	26%	18%	10%	19%	3%	6%
Parades of local importance	24%	23%	12%	7%	24%	3%	8%

Red = increase, Blue = decrease



12. Town Centre Vacancy Rates

The overall vacancy rate for **all frontages** in the borough's five town centres in 2022 is 7.8%, a large decrease on the 9.4% recorded in 2021. The fall of 1.6% follows a year on year rise since 2016, when a 5.8% vacancy rate was recorded. Numbers of vacant units have fallen by 25 units to 81 across the five centres.

The greatest decrease of 3.8% was in Richmond town centre, and East Sheen and Whitton also saw a decrease in vacancy rates of 2.4% and 2.9% respectively. There was a slight increase of 1.5% in Teddington and a smaller increase in Twickenham of 0.3%. East Sheen now has the highest vacancy rate of 9% recorded with 26 vacant units out of a total of 298 units in the centre.

- 81 units in **all designated frontages** in the five town¹³ centres were vacant in 2022, which is a vacancy rate of 7.5%. This is compared to 9.8% in 2021 and 8.8% in 2020. The lowest rate was 5.4% recorded in 2016.
- Vacancy rates in **key shopping frontages** are slightly lower with 7.4% of units vacant, compared with 9.2% in 2021 and 9.3% recorded in 2020.
- The town centre vacancy rate in **all frontages** is higher than in designated frontages but has decreased significantly to 7.8%, from 9.4% in 2021 and 9% in 2020.

Town Centre Vacancy Rate (All frontages)

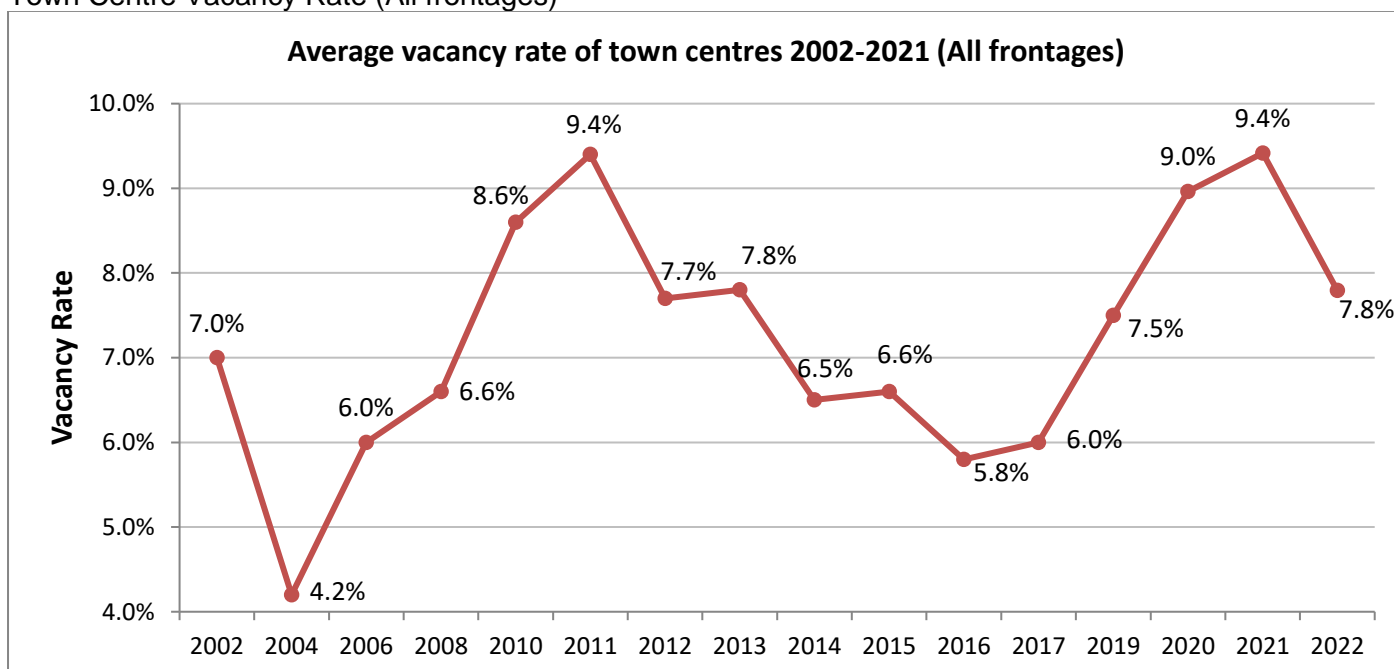


Table 6: Town Centre Vacancy Rate (All frontages) 2012 - 2022

Year	2012	2013	2014	2015	2016	2017	2019	2020	2021	2022
Vacancy Rate	7.7%	7.8%	6.5%	6.6%	5.8%	6.0%	7.5%	9.0%	9.4%	7.8%

Table 7: Town Centre Vacancy Rate (All frontages)

	2014	2015	2016	2017	2019	2020	2021	2022	Average
Richmond	6.5	7.3	5.3	4.7	6.7	9.7	12.1	8.3	7.6
East Sheen	5.9	4.8	6.2	7.6	9.3	9.9	11.4	9.0	8.0
Teddington	2.6	3.6	7.7	7.2	4.6	8.2	7.2	8.8	6.2
Twickenham	9.4	8.4	5.7	5.7	9.1	9.4	6.6	7.0	7.7
Whitton	6.7	9	3.8	5.2	6.6	5.2	7.4	4.4	6.0
Total	6.5	6.6	5.8	6.0	7.5	9.0	9.4	7.8	7.3

¹³ Town centres are synonymous with main centres as defined in the adopted Local Plan

13. Town Centre Retail Categories

The tables 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 composition in each Town Centre illustrates the market forces, character, and demographic of each area. Table 9 shows changes in each town centre since the 2021 survey. Notable changes include a decrease in Services in Whitton and an increase in Food and Leisure in Twickenham.

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	12%	20%	29%	10%	23%	1%	5%
Richmond	8%	17%	32%	11%	24%	4%	4%
Teddington	12%	21%	26%	11%	22%	2%	6%
Twickenham	14%	20%	20%	12%	25%	3%	6%
Whitton	19%	23%	20%	10%	22%	2%	5%
Grand Total	12%	20%	26%	11%	23%	2%	5%

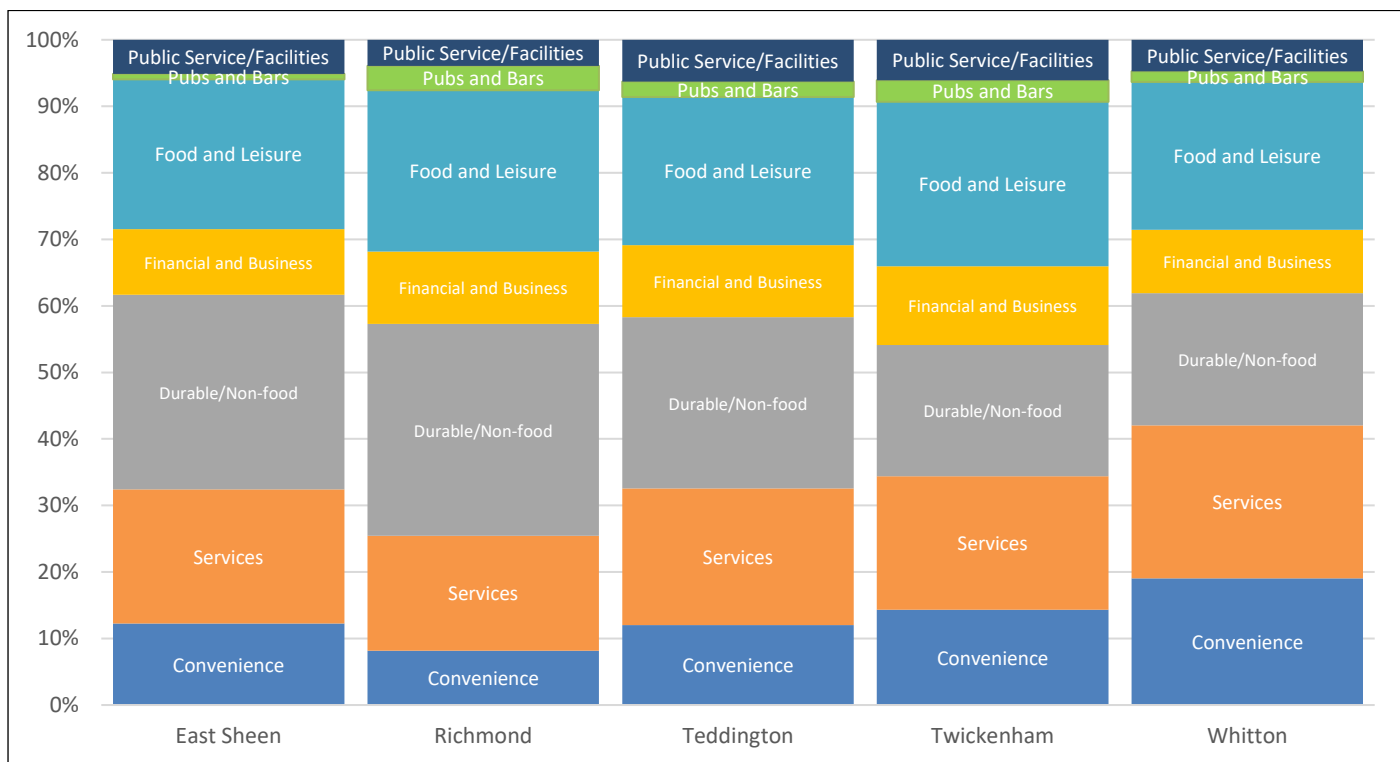


Table 9: Change in percentage of trading units in Town Centres by retail category – 2021 - 2022

Town Centre	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
East Sheen	-1%	0%	0%	0%	0%	0%	0%
Richmond	0%	-1%	1%	-1%	1%	0%	0%
Teddington	0%	1%	0%	-1%	0%	0%	0%
Twickenham	-1%	-1%	1%	0%	2%	-1%	0%
Whitton	1%	-2%	0%	1%	1%	0%	-1%
Grand Total	0%	0%	0%	0%	0%	-1%	0%

14. Town Centre vacancy rates

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

	key shopping frontage							secondary shopping frontage							all designated frontage						
	2015	2016	2017	2019	2020	2021	2022	2015	2016	2017	2019	2020	2021	2022	2015	2016	2017	2019	2020	2021	2022
Richmond	7.7	4.7	4.3	4.8	10.8	10.4	6.5	5.9	7.1	5.9	9.8	8.6	17.8	11.2	7.2	5.5	4.8	6.3	10.1	12.7	8
East Sheen	2.6	3.9	6.6	14.7	11.8	15.6	10.4	3.8	6	9	5.2	6	7.5	4.5	3.3	5.3	8.1	8.6	8.1	10.5	6.7
Teddington	3.4	7.7	4.3	6	6	6.8	9.4	3.3	6.7	6.7	5.1	15.3	10.2	10	3.4	7.3	5.1	5.7	9.1	8.0	9.6
Twickenham	7.6	4.6	6.2	8.5	11.4	7.5	7.5	7	6.1	3.5	7.8	7	7.8	7.8	7.3	5.3	4.9	8.2	9.3	7.6	7.6
Whitton	8.8	1.8	7	8.6	3.6	5.2	3.4	10.2	4.2	6.1	6	8	10	4	9.4	2.9	6.6	7.4	5.7	7.4	3.7
Average	6.4	4.9	5.2	7.4	9.5	9.2	7.4	5.7	6.2	6.3	6.7	8.2	10.5	7.5	6.1	5.4	5.7	7.2	8.9	9.8	7.5

Table 11: Vacancy rates in 5 main town centres (all frontages)

	centre vacancy rate (all frontages)							number of vacant units						
	2015	2016	2017	2019	2020	2021	2022	2015	2016	2017	2019	2020	2021	2022
Richmond	7.3	5.3	4.7	6.7	9.7	12.1	8.3	26	19	17	24	35	44	30
East Sheen	4.8	6.2	7.6	9.3	9.9	11.4	9.0	14	18	22	27	29	33	26
Teddington	3.6	7.7	7.2	4.6	8.2	7.2	8.8	7	15	14	9	16	14	17
Twickenham	8.4	5.7	5.7	9.1	9.4	6.6	7.0	25	17	17	27	28	20	21
Whitton	9	3.8	5.2	6.6	5.2	7.4	4.4	12	5	7	9	7	10	6
Average/total	6.6	5.8	6	7.5	9.0	9.4	7.8	84	74	77	96	115	121	100

Source: LBRuT Town Centre Land Use Surveys. Produced by Local Plan Team. Snapshot surveys.

Red indicates an increase in the vacancy rate between 2021 and 2022, black no change, and blue a fall in the rate.

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

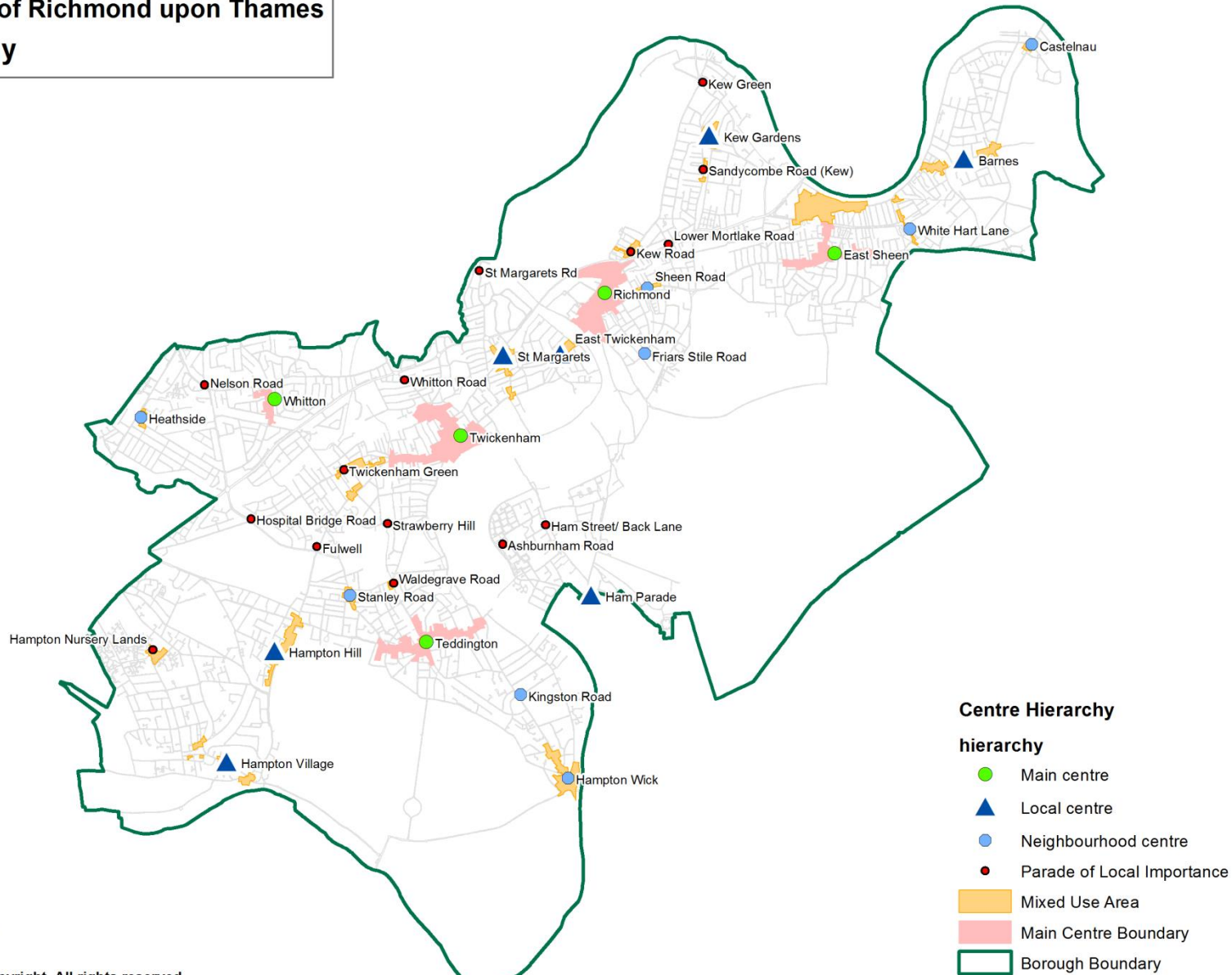
	key shopping frontage							secondary shopping frontage							all designated frontage						
	2015	2016	2017	2019	2020	2021	2022	2015	2016	2017	2019	2020	2021	2022	2015	2016	2017	2019	2020	2021	2022
Local centres																					
Barnes	1.3	2.6	8.0	5.3	6.6	7.9	3.9	3.7	0.0	11.5	3.8	11.5	0.1	23.1	2.0	2.0	8.9	4.9	7.8	8.8	8.8
East Twickenham	21.1	11.1	0.0	0.0	17.6	23.5	17.6	17.3	0.0	5.7	5.7	5.7	0.0	11.3	18.3	2.9	4.2	4.3	8.6	8.6	12.9
Hampton Hill	0.0	0.0	3.4	17.2	24.1	17.2	3.4	8.5	2.1	4.3	6.5	10.4	0.1	2.1	5.3	1.3	3.9	10.7	15.6	11.7	2.7
Hampton Village	3.6	3.7	3.7	7.1	7.1	14.3	7.1	5.6	0.0	0.0	5.0	0.0	0.1	5.0	4.3	2.2	2.1	6.3	4.2	10.4	6.3
Ham Parade	6.7	6.7	6.7	0.0	0.0	0.0	6.7	25.0	0.0	0.0	0.0	25.0	0.0	0.0	8.8	5.9	5.9	0.0	2.9	0.0	5.9
Kew Gardens	8.0	4.2	0.0	0.0	4.2	0.0	8.3	6.3	6.3	0.0	6.3	6.3	0.1	12.5	7.3	5.0	0.0	2.6	5.0	2.5	10.0
St Margarets	6.5	0.0	0.0	3.2	3.2	3.3	0.0	3.1	9.4	18.8	12.1	12.1	0.1	9.1	4.8	4.8	9.5	7.8	7.8	6.3	4.8
Average	5.1	3.4	4.3	5.1	8.1	8.5	5.6	9.2	2.6	7.1	6.6	8.5	0.1	9.5	6.9	3.0	5.6	5.8	8.3	7.8	7.4
Neighbourhood																					
Castelnau	13.0	0.0	0.0	8.7	0.0	13.0	21.7	-	-	-	-	-	-	-	13.0	0.0	0.0	8.7	0.0	13.0	21.7
Friars Stile Road*	17.6	6.3	0.0	5.9	0.0	0.0	0.0	-	-	-	-	-	-	-	17.6	6.3	0.0	5.9	0.0	0.0	0.0
Hampton Wick*	12.5	25.0	12.5	0.0	12.5	12.5	0.0	-	-	-	-	-	-	-	12.5	25.0	12.5	0.0	12.5	12.5	0.0
Heathside	0.0	0.0	0.0	20.0	13.3	6.7	20.0	0.0	7.7	0.0	7.7	7.1	0.1	0.0	0.0	3.6	0.0	14.3	10.3	10.3	10.3
Sheen Road	0.0	11.1	0.0	11.1	11.1	33.3	33.3	0.0	0.0	0.0	0.0	0.0	0.0	16.7	0.0	6.3	0.0	5.9	5.9	14.3	26.7
Kingston Road	13.3	6.7	6.7	6.7	6.7	0.0	6.7	50.0	0.0	16.7	0.0	0.0	0.0	0.0	23.8	5.6	9.5	4.8	4.8	0.0	4.8
Stanley Road	4.8	0.0	4.8	0.0	0.0	0.0	4.8	13.3	6.7	6.7	12.5	0.0	0.0	0.0	8.3	2.8	5.6	5.4	0.0	0.0	2.7
White Hart Lane	13.6	4.8	9.5	13.0	8.7	4.3	4.3	4.8	4.8	9.5	4.8	4.8	0.0	4.8	9.3	4.8	9.5	9.1	6.8	4.5	4.5
Average	10.0	4.7	3.9	8.4	5.3	6.9	10.7	9.7	5.1	6.3	6.3	3.1	0.0	3.2	9.9	4.8	4.7	7.7	4.6	6.2	8.2
Local parades																					
Ashburnham Road	0.0	0.0	0.0	12.5	25.0	25.0	12.5	-	-	-	-	-	-	-	0.0	0.0	0.0	12.5	25.0	25.0	12.5
Fulwell	0.0	11.1	0.0	22.2	11.1	33.3	22.2	-	-	-	-	-	-	-	0.0	11.1	0.0	22.2	11.1	33.3	22.2
Ham Street / Back Lane	23.1	15.4	23.1	30.8	15.4	23.1	30.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	17.6	11.8	17.6	23.5	11.8	17.6	23.5
Hampton Nursery Lands	0.0	0.0	0.0	25.0	25.0	0.0	0.0	-	-	-	-	-	-	-	0.0	0.0	0.0	25.0	25.0	0.0	0.0
Hospital Bridge Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	-	-	-	-	-	-	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kew Green	12.5	12.5	25.0	0.0	0.0	0.0	0.0	-	-	-	-	-	-	-	12.5	12.5	25.0	0.0	0.0	0.0	0.0
Kew Road	-	-	-	-	-	-	-	0.0	3.4	3.4	10.3	0.0	0.0	0.0	0.0	3.4	3.4	10.3	3.4	6.9	10.3
Lower Mortlake Road	0.0	0.0	0.0	0.0	27.3	18.2	9.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	25.0	16.7	8.3
Nelson Road	9.1	18.2	18.2	27.3	0.0	9.1	9.1	-	-	-	-	-	-	-	9.1	18.2	18.2	27.3	9.1	9.1	9.1
Sandycombe Road**	0.0	0.0	0.0	16.7	0.0	0.0	0.0	0.0	0.0	16.7	0.0	33.3	16.7	16.7	0.0	0.0	8.3	16.7	16.7	8.3	8.3
Strawberry Hill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	-	-	-	-	-	-	0.0	0.0	12.5	25.0	0.0	0.0	0.0
Twickenham Green	16.7	11.1	0.0	5.6	0.0	5.6	0.0	-	-	-	-	-	-	-	16.7	11.1	0.0	0.0	0.0	7.1	0.0
Waldegrave Road	10.0	10.0	20.0	20.0	10.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.1	7.1	0.0	5.6	5.6	0.0	5.6
St Margarets Road*	-	-	-	-	-	-	-	25.0	12.5	12.5	25.0	12.5	12.5	12.5	25.0	12.5	14.3	14.3	7.1	7.1	7.1
Whitton Road	0.0	0.0	0.0	0.0	0.0	16.7	0.0	-	-	-	-	-	-	-	0.0	0.0	0.0	0.0	0.0	16.7	0.0
Average	7.3	7.2	7.3	12.2	7.4	10.6	7.3	3.8	3.8	5.8	11.5	5.8	3.8	3.8	6.3	6.3	6.9	12.0	5.7	9.7	8.6

Table 13: Vacancy Rates in Local, Neighbourhood Centres and Local Parades (all frontages)

	centre vacancy rate (all frontages)							number of vacant units						
	2015	2016	2017	2019	2020	2021	2022	2015	2016	2017	2019	2020	2021	2022
Local centres														
Barnes	2.4	2.4	8.6	7.0	8.6	7.9	8.7	3	3	11	9	11	10	11
East Twickenham	17.1	2.7	3.9	5.3	9.3	9.3	13.3	13	2	3	4	7	7	10
Hampton Hill	11.4	6.2	12.9	13.6	14.9	12.8	10.0	15	8	17	18	20	17	13
Hampton Village	5.1	2.5	1.3	7.4	6.2	8.5	8.5	4	2	1	6	5	7	7
Ham Parade	7	7	9.3	0.0	2	0	7.0	3	3	4	0	1	0	3
Kew Gardens Station	5.9	4.1	2.0	2.1	4.1	4.2	8.3	3	2	1	1	2	2	4
St Margarets	4.5	4.4	8.8	8.7	8.7	5.9	4.4	3	3	6	6	6	4	3
Average/total	7.7	4	7.5	7.6	9.0	8.2	8.9	44	23	43	44	52	47	51
Neighbourhood centres														
Castelnau	12.5	0	0.0	8.0	0.0	12.0	20.0	3	0	0	2	0	3	5
Friars Stile Road	14.3	5.3	4.8	4.8	0.0	4.8	0.0	3	1	1	1	0	1	0
Hampton Wick	29.8	11.1	6.9	5.1	8.1	14.5	9.5	17	5	4	3	5	9	6
Heathside	0	3	0.0	15	11.8	11.8	11.8	0	1	0	5	4	4	4
Sheen Road	4.9	6.5	4.3	8.7	4.3	6.8	11.4	2	3	2	4	2	3	5
Kingston Road	23.8	5.6	9.5	4.8	4.8	0.0	4.8	5	1	2	1	1	0	1
Stanley Road	6.7	4.4	6.7	8.7	2.2	2.2	6.5	3	2	3	4	1	1	3
White Hart Lane	13.3	5.4	8.3	8.1	6.3	6.3	6.3	8	3	5	5	4	4	4
Average/total	13.6	5.6	5.5	8.0	5.3	7.9	8.8	41	16	17	25	17	25	28
Local parades														
Ashburnham Road	0	0	0.0	0	25.0	25.0	12.5	0	0	0	0	2	2	1
Fulwell	0	8.3	0.0	17	8.3	25.0	16.7	0	1	0	2	1	3	2
Ham Street / Back Lane	16.7	11.1	16.7	22.2	11.1	16.7	22.2	3	2	3	4	2	3	4
Hampton Nursery Lands	0	0	0.0	9	8.3	9.1	9.1	0	0	0	1	1	1	1
Hospital Bridge Road	0	0	0.0	0	0	0	0.0	0	0	0	0	0	0	0
Kew Green	5.3	5.3	15.8	0.0	5	5	5.3	1	1	3	0	1	1	1
Kew Road	0	2.9	2.9	8.6	2.9	8.6	8.6	0	1	1	3	1	3	3
Lower Mortlake Road	0	0	4.5	0.0	13.6	13.6	13.6	0	0	1	0	3	3	3
Nelson Road	9.1	18.2	18.2	27.3	9.1	9.1	9.1	1	2	2	3	1	1	1
Sandycombe Road**	4.7	5.1	7.7	10.3	10.3	5.3	7.9	2	2	3	4	4	2	3
Strawberry Hill	0	0	0.0	0	0	0	0.0	0	0	0	0	0	0	0
Twickenham Green	14.3	11.4	4.5	9.1	4.5	6.8	9.1	6	5	2	4	2	3	4
Waldegrave Road	6.7	6.7	13.3	13.3	6.7	6.7	13.3	1	1	2	2	1	1	2
St Margarets Road*	18.2	9.1	9.1	18.2	7.1	14.3	14.3	2	1	1	2	1	2	2
Whitton Road	6.7	28.6	26.7	33.3	13.3	16.7	0.0	1	4	4	5	2	2	0
Average/total	6.1	7.1	7.9	10.8	7.9	9.8	9.8	17	20	22	30	22	27	27

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

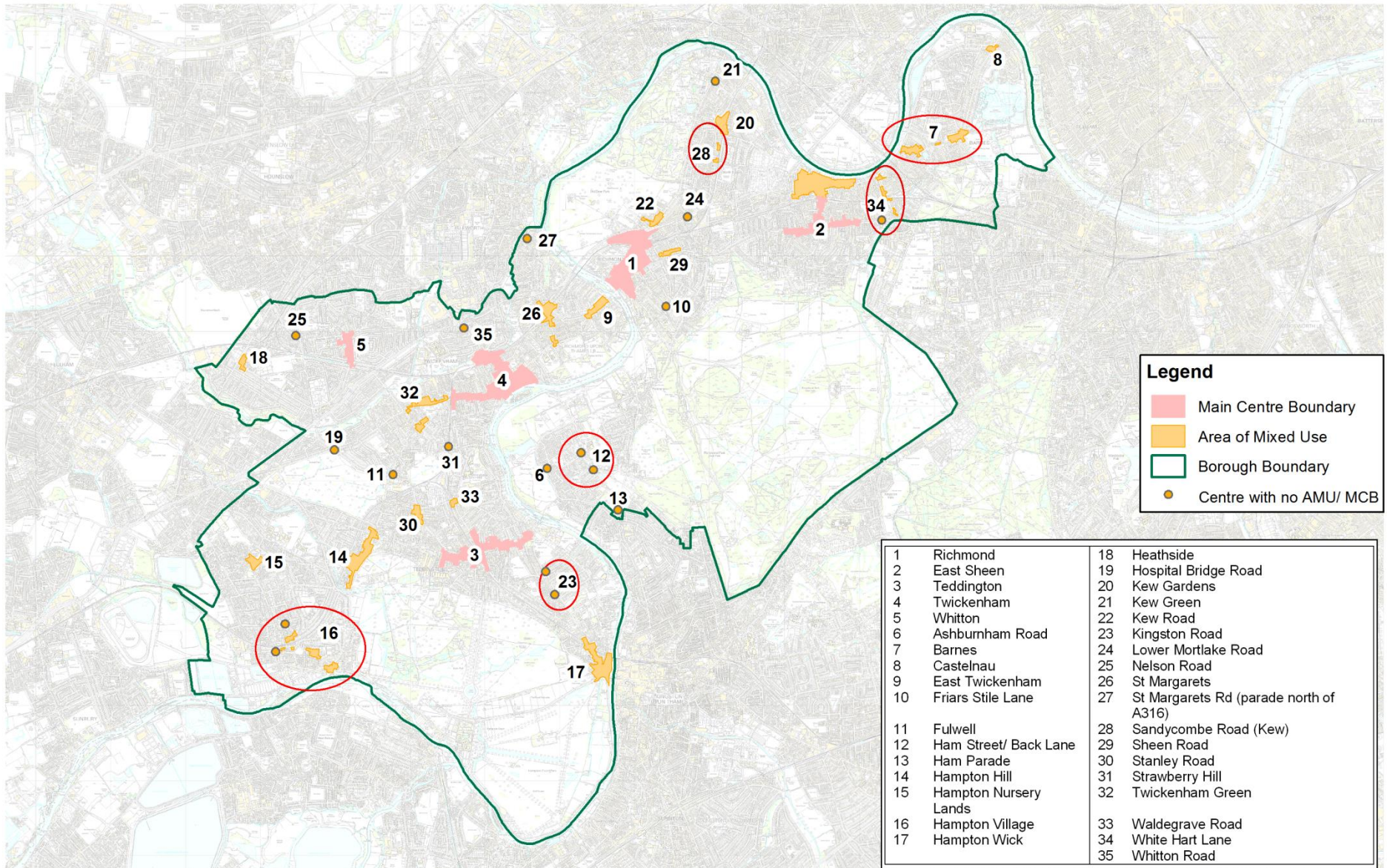
London Borough of Richmond upon Thames Centre Hierarchy



Local Plan designations
Produced by Local Plan Team

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Centres in Richmond upon Thames



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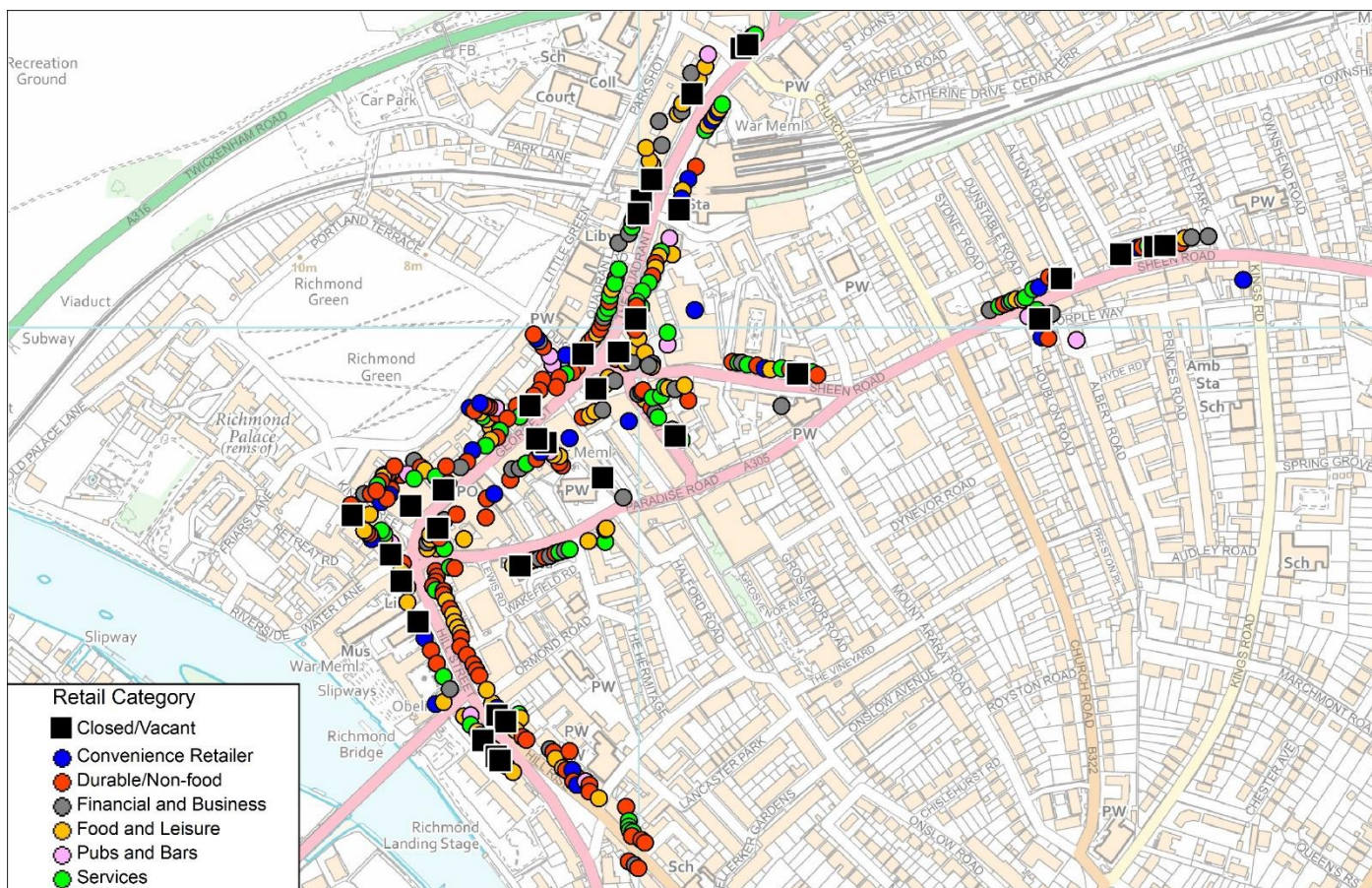


Red circles identify extent of designated frontage
in that particular centre

Local Plan designations
Produced by Local Plan Team

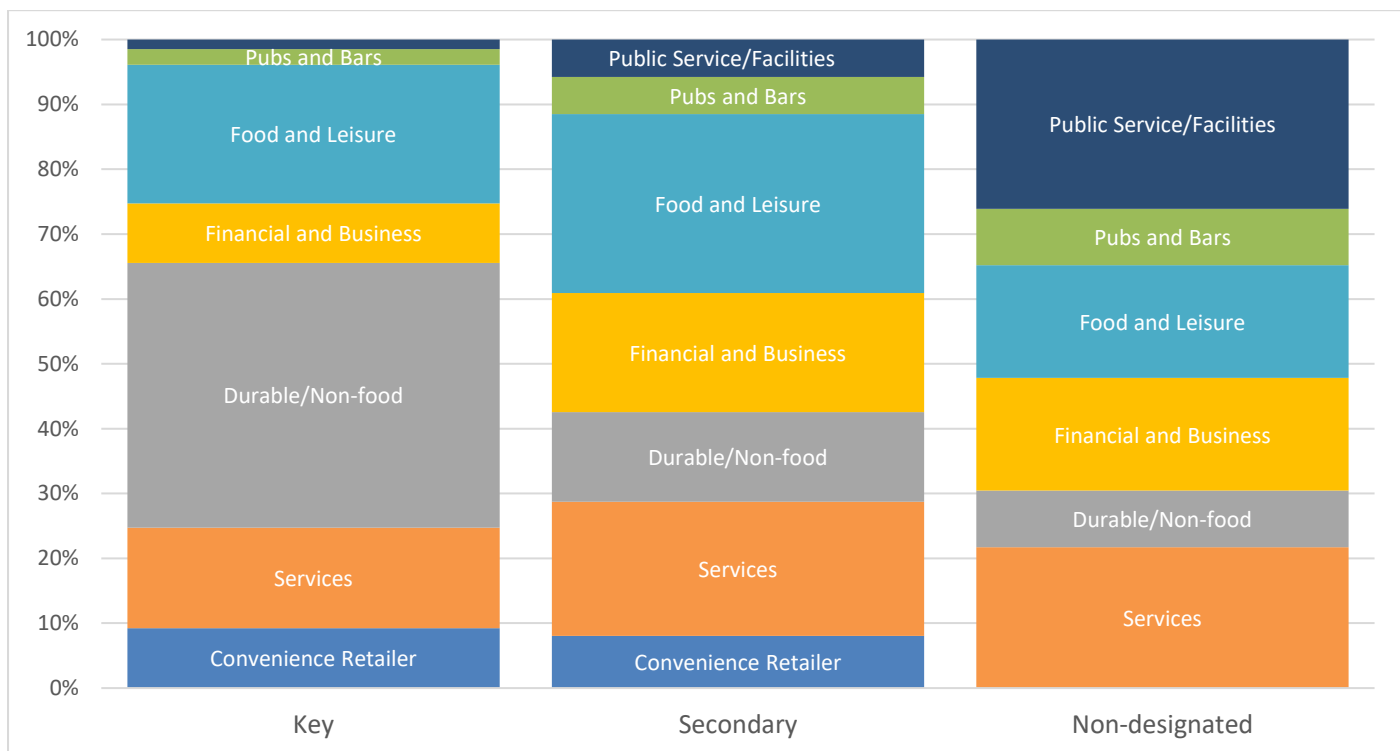
15. Richmond Town Centre – Headline results

- Out of the 30 vacancies in Richmond town centre, 29 were vacant units and 1 was undergoing refurbishment.
- 16 of the vacant units were also recorded as vacant in 2021, and 5 of these were also vacant in 2020.
- Vacancies are spread evenly across the centre with 7 on George Street, 6 on The Quadrant and 5 on Hill Rise and Hill Street.
- 2 of the newly vacant units were previously restaurants, 2 clothes shops, 2 cafes, a bank and an estate agent were also newly vacant.
- 15 Vacant units were in Key Frontages, 12 were in Secondary Frontages and 3 in non-designated frontages



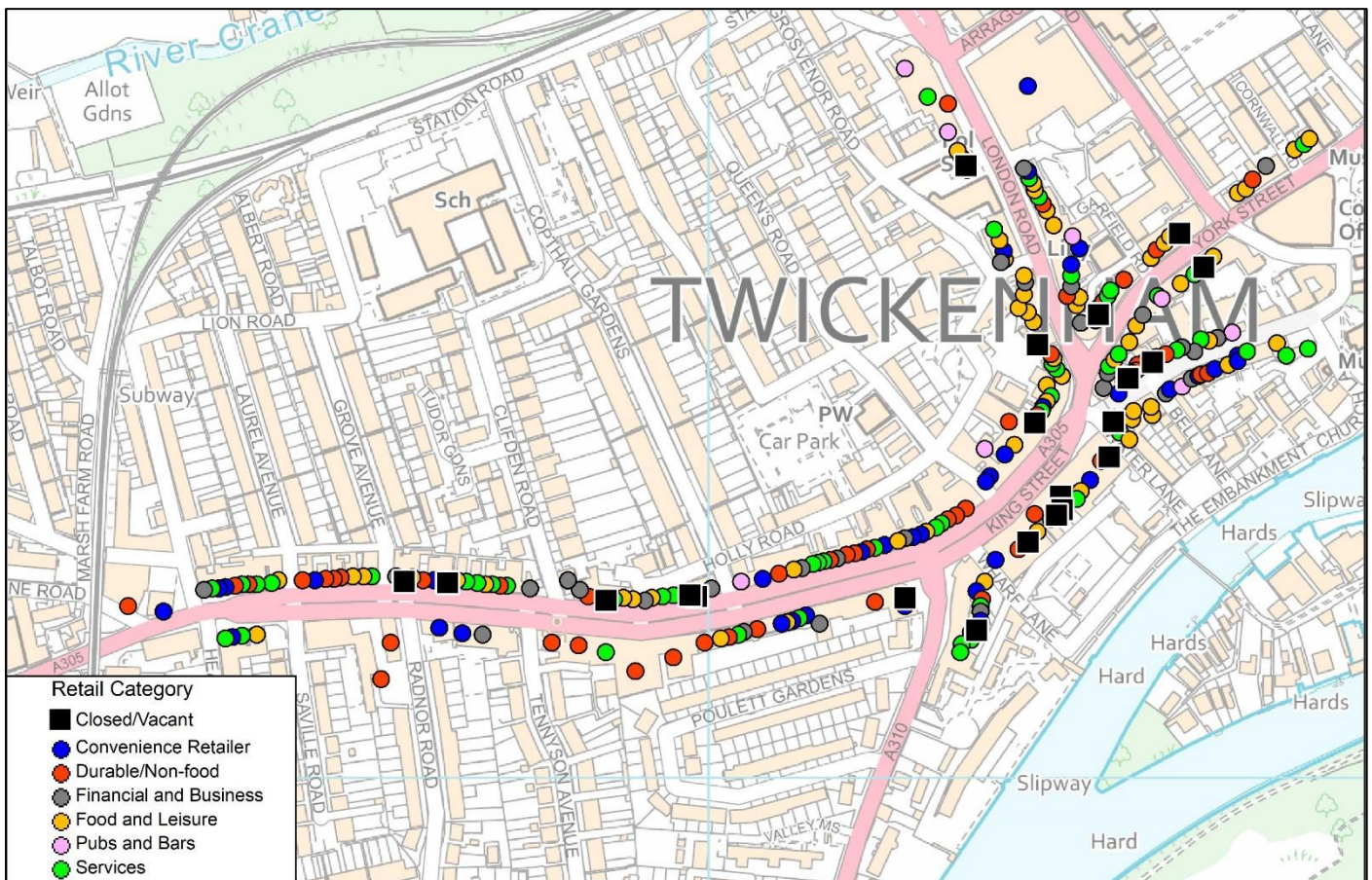
16. Richmond Town Centre – Retail Categories

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%



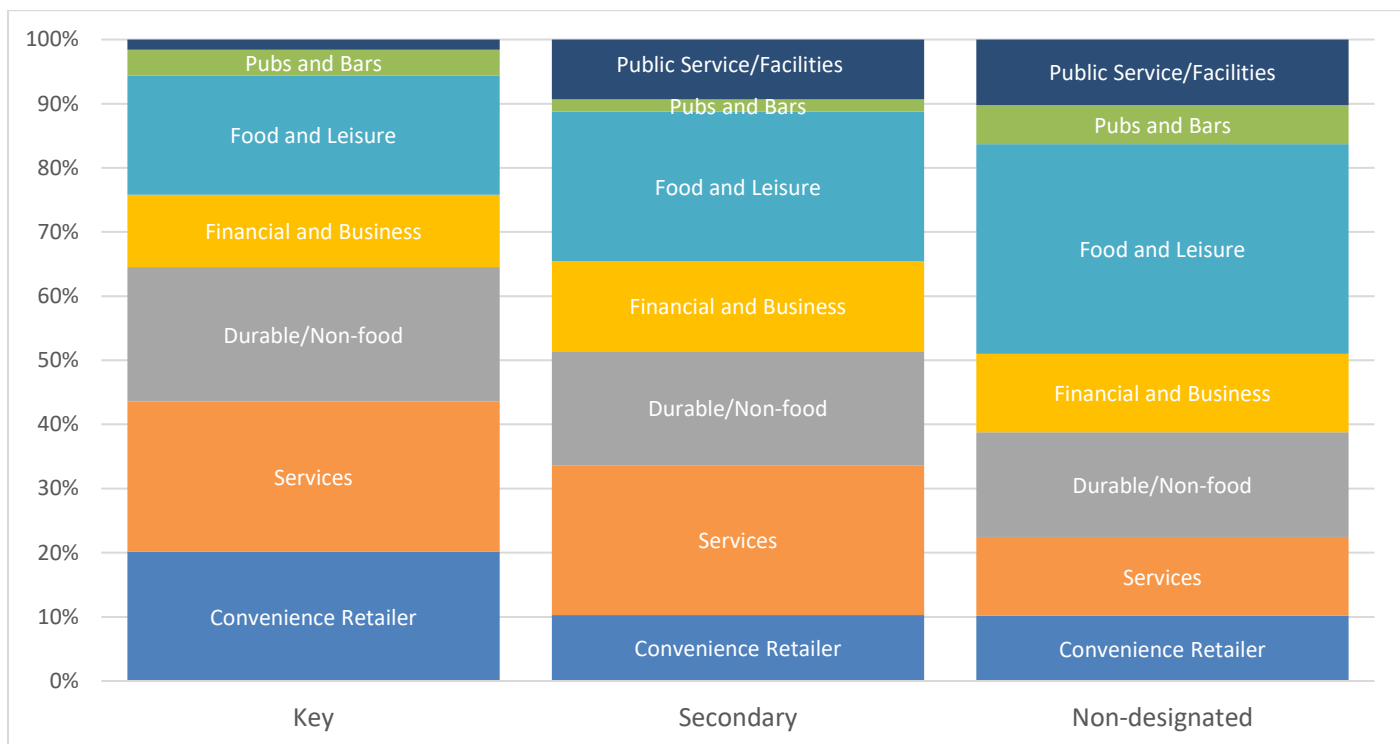
17. Twickenham – Headline results

- There were 21 vacancies in Twickenham Town Centre which compares to a total of 20 vacant units in 2021. Newly vacant units included a bank and restaurant, and 5 units were undergoing refurbishment, including a Funeral director and an Optician.
- 10 vacant shops remained unoccupied from 2021.
- 6 vacant units on Heath Road included 3 newly vacant units and 3 units remaining unoccupied from 2021.
- 7 vacant units on King Street included a newly vacant bank, an optician undergoing refurbishment and a health food shop, together with 4 units that were recorded as vacant in 2021.
- The remaining vacancies included 2 units on London Road, 3 on York Street and 3 on Church Street.



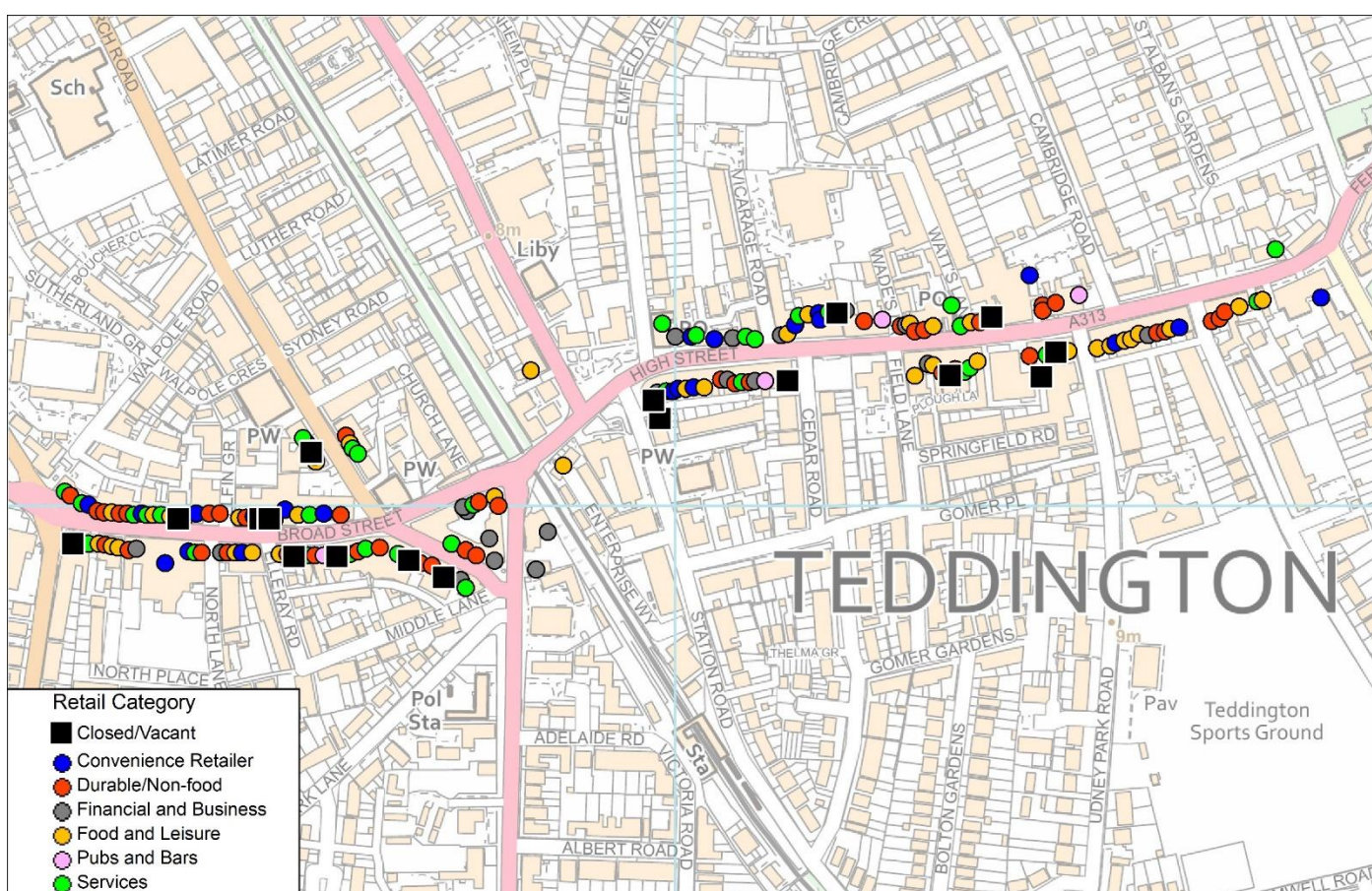
18. Twickenham – Retail Categories

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%



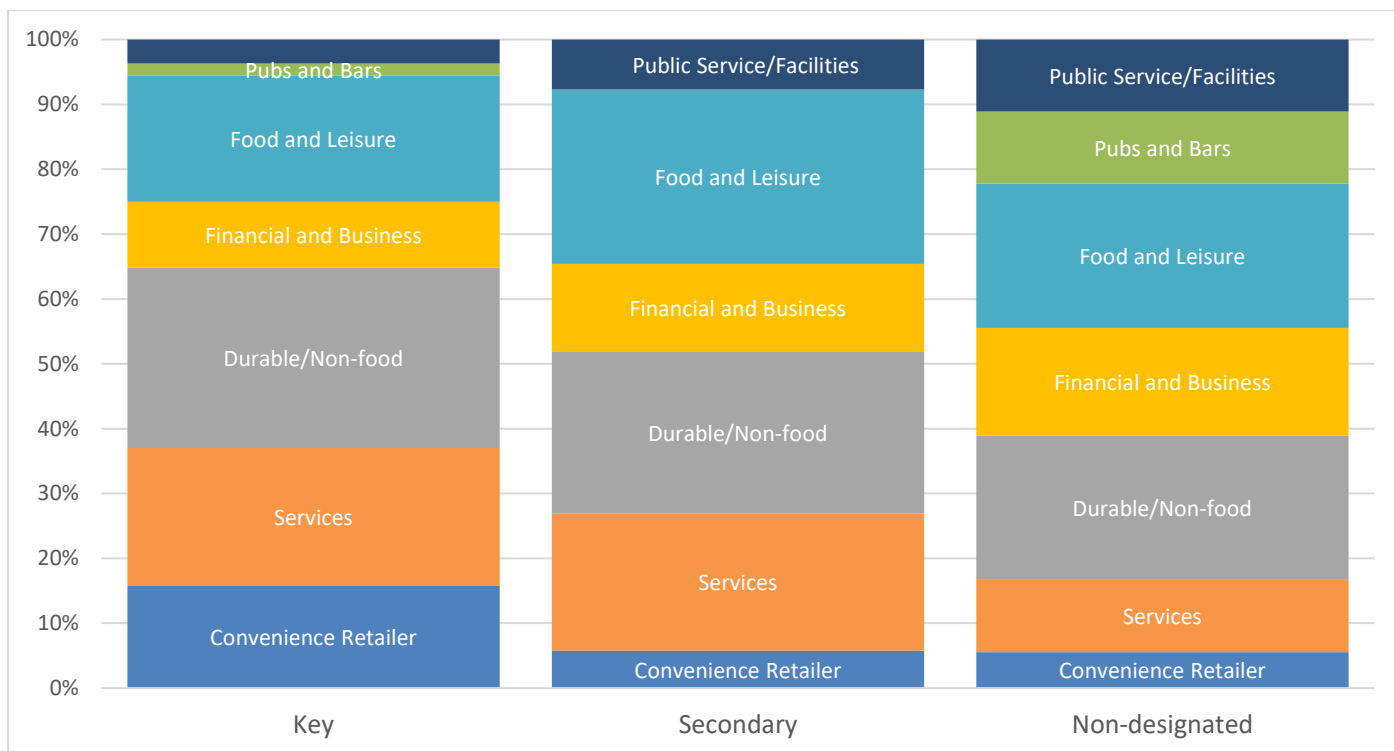
19. Teddington – Headline results

- Teddington had 17 vacant units compared to 14 recorded in 2021.
- There were 7 newly vacant units which included a shoe shop, betting shop and a restaurant.
- 3 units were undergoing refurbishment at the time of the survey.
- 10 units have remained vacant since the 2021 survey and 7 of these were also recorded as vacant in 2020.
- 7 vacant units were on High Street, including 4 units recorded as vacant in 2021, 2 units under refurbishment, and a newly vacant restaurant.
- 6 vacant units were on Broad Street, including a newly vacant shoe shop, a sportswear shop and a betting shop.
- 2 vacant units at The Causeway included an office unit and a café.
- 11 of the vacancies were in the key shopping frontages with the remaining 6 in the secondary frontages.



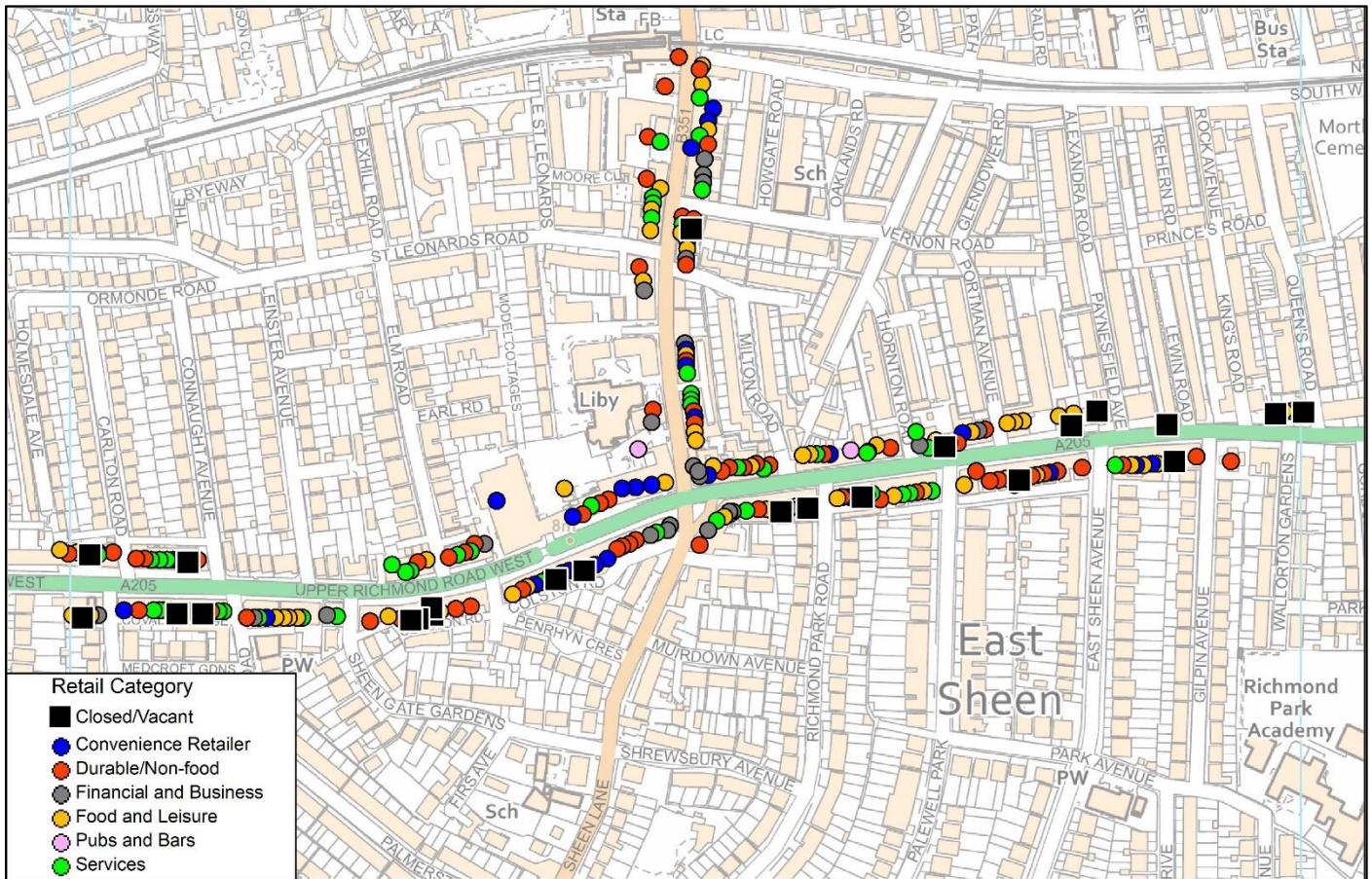
20. Teddington – Retail Categories

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%



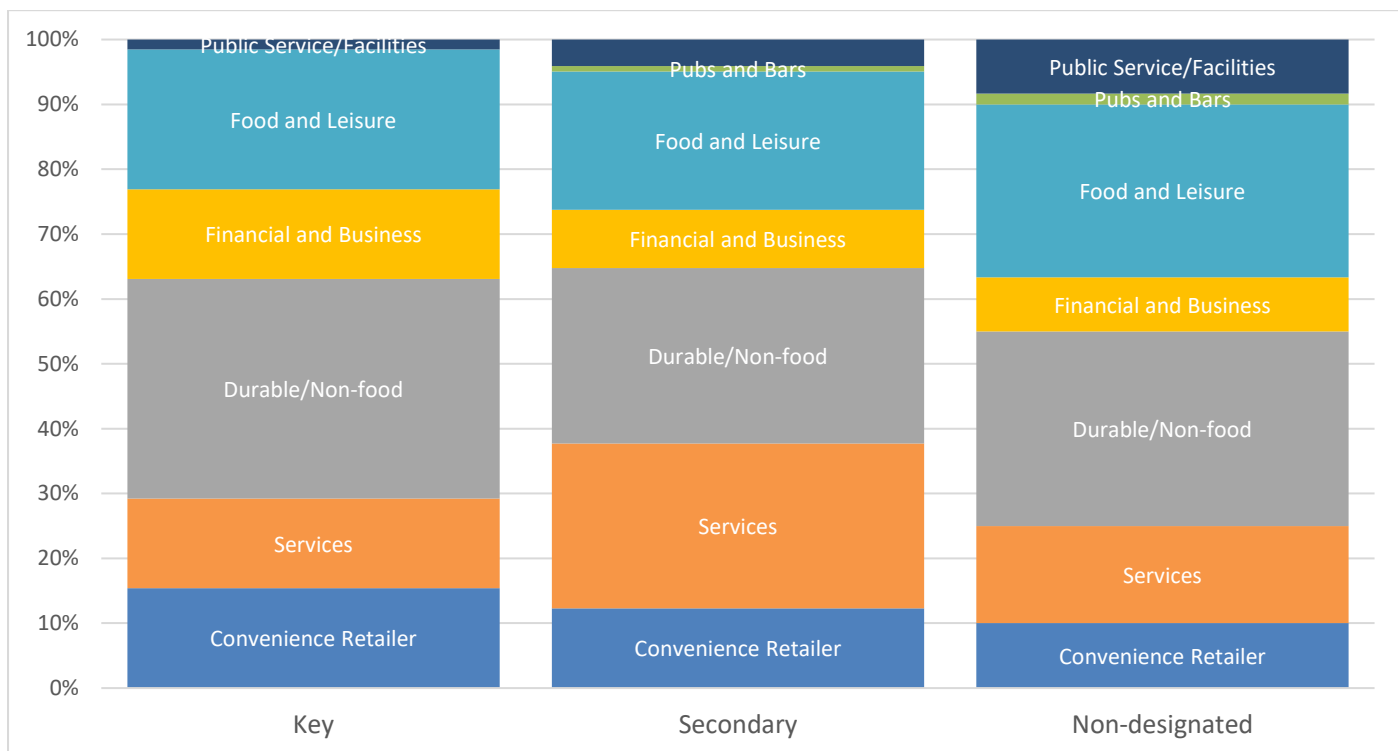
21. East Sheen – Headline results

- East Sheen had 26 vacant units compared with 33 recorded in 2021.
- 10 newly vacant shops included 3 restaurants, a café, and a clothes shop.
- 16 units remained unoccupied since the 2021 survey.
- 25 vacant units were on Upper Richmond Road West, and there was 1 vacant unit on Sheen Lane
- 8 vacant units were located in Key frontages, 6 in secondary frontages and 12 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

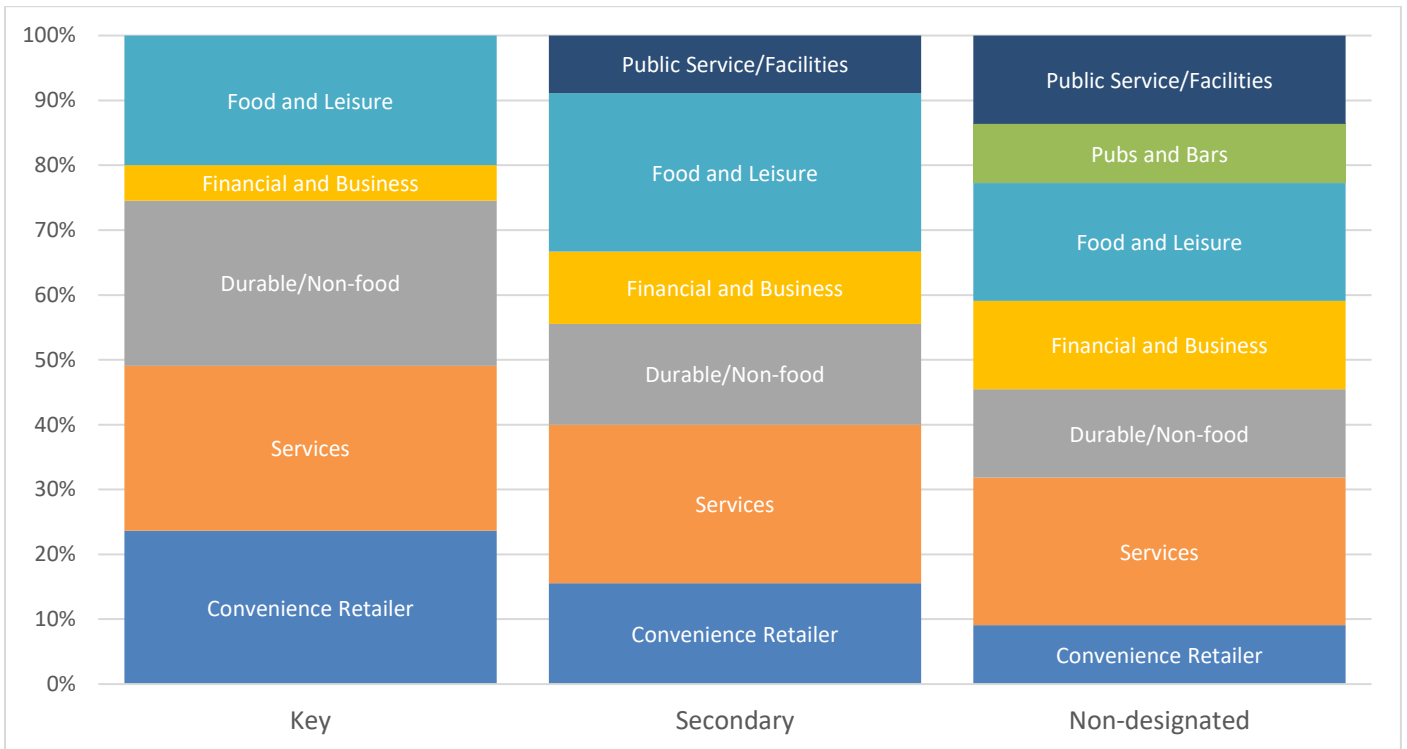
- There were 6 vacant units in Whitton compared to 10 vacancies in 2021 within the main centre boundary¹⁴.
- 4 of these units remained unoccupied since the 2021 survey, and there was a newly vacant electrical supplies shop and a vacant unit following the reduction in size of a pet shop by division into 2 units.
- 2 of the vacant units were in key frontages, 2 on secondary frontages and the remaining 2 were on the non-designated frontages at Percy Road and Hounslow Road.



¹⁴ 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%



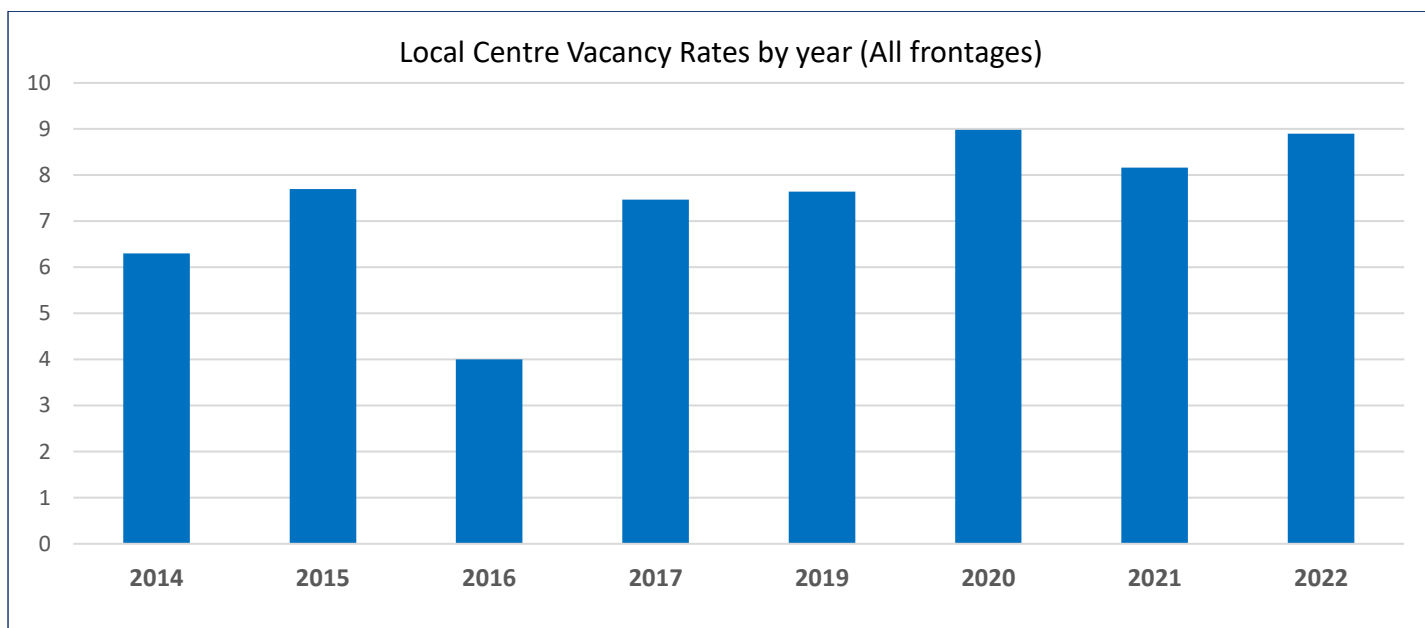
25. Local Centre vacancy rates

Vacancy rates in **key frontages** in the local centres have increased slightly by 0.4% overall to 8.5%, when compared to 2021.

The vacancy rate in **all frontages** in local centres has increased marginally from 8.2% in 2021 to 8.9%, with notable increases in Ham Parade (+7%), Kew Gardens (+4.2%) and East Twickenham (+4%). Decreases in vacancy rates were recorded in Hampton Hill (-2.8%) and St. Margarets (-1.5%) taking both local centres to below the average rates.

Local Centre Vacancy Rates by year (All frontages)

	2014	2015	2016	2017	2019	2020	2021	2022	Average
Barnes	4.0	2.4	2.4	8.6	7.0	8.6	7.9	8.7	6.2
East Twickenham	9.1	17.1	2.7	3.9	5.3	9.3	9.3	13.3	8.8
Hampton Hill	10.6	11.4	6.2	12.9	13.6	14.9	12.8	10.0	11.6
Hampton Village	2.5	5.1	2.5	1.3	7.4	6.2	8.5	8.5	5.3
Ham Parade	7.0	7.0	7.0	9.3	0.0	2.3	0.0	7.0	5.0
Kew Gardens	3.9	5.9	4.1	2.0	2.1	4.1	4.2	8.3	4.3
St Margarets	4.5	4.5	4.4	8.8	8.7	8.7	5.9	4.4	6.2
Grand Total	6.3	7.7	4.0	7.5	7.6	9.0	8.2	8.9	7.4



26. Local Centre retail categories

	Convenience Retailer	Services	Durable/ Non-food	Financial and Business	Food and Leisure	Pubs and Bars	Public Service/ Facilities
Barnes	19%	19%	27%	9%	18%	4%	6%
East Twickenham	9%	31%	29%	5%	15%	2%	9%
Ham Common	21%	26%	18%	8%	21%	0%	5%
Hampton Hill	13%	22%	21%	10%	21%	2%	11%
Hampton Village	19%	29%	15%	11%	18%	0%	8%
Kew Gardens	25%	14%	16%	7%	30%	2%	7%
St Margarets	19%	23%	14%	14%	20%	2%	8%
Grand Total	17%	23%	21%	9%	20%	2%	8%



27. Neighbourhood Centre vacancy rates

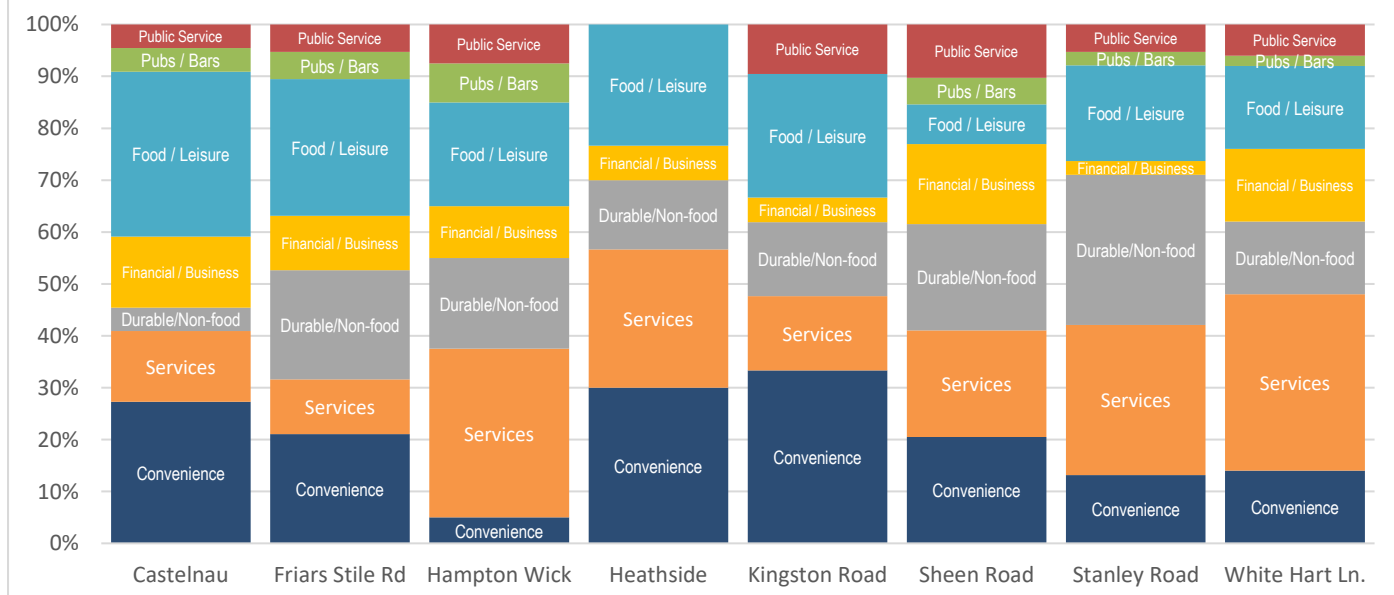
The vacancy rate in **all frontages** in the neighbourhood centres has increased since 2021 from an average of 7.9% to 8.8%. This follows a larger increase between 2020 and 2021 from an average of 5.3% to 7.9%. Castelnau again had the largest increase with 5 out of 25 units being vacant. This includes the three vacancies from the previous year and are a range of uses including the former Post Office. Sheen Road and Stanley Road neighbourhood centres also saw an increase. Hampton Wick recorded 3 fewer vacant units and Friars Stile Road recorded no vacant units. As recorded in 2020 and 2021, 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	2022	Average
Castelnau	8%	12%	0%	0%	8%	0%	12%	20%	4.7%
Friars Stile Road	4.8%	14.3%	4.8%	4.8%	4.8%	0%	4.8%	0%	5.6%
Hampton Wick	20.7%	29.3%	8.6%	6.9%	5.1%	8.1%	14.5%	9.5%	13.1%
Heathside	0%	0%	3%	0%	15.2%	11.8%	11.8%	11.8%	5.0%
Sheen Road	4.8%	4.8%	6.4%	4.3%	8.7%	4.3%	6.8%	11.4%	5.5%
Kingston Road	4.8%	23.8%	4.8%	9.5%	4.8%	4.8%	0%	4.8%	8.7%
Stanley Road	4.4%	6.7%	4.4%	6.7%	8.7%	2.2%	2.2%	6.5%	5.5%
White Hart Lane	8.3%	13.3%	5%	8.3%	8.1%	6.3%	6.3%	6.3%	8.2%
Grand Total	8.2%	13.4%	5.2%	5.5%	8%	5.3%	7.9%	8.8%	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 Road	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 Lane	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 remained unchanged overall at 9.8% since the 2021 survey, with a total of 27 vacant units. There was no change in the number of vacant units in 8 of the 15 local parades, 3 saw a decrease and 4 parades saw an increase compared to 2021. Whitton Road recorded no vacancies for the first time since 2014. Two other parades, Strawberry Hill and Hospital Bridge Road had no vacancies in 2022, which is typical for both centres as the table below shows.

	2014	2015	2016	2017	2019	2020	2021	2022	Average
Ashburnham Road	0%	0%	0%	0%	0%	25.0%	25.0%	12.5%	7.8%
Fulwell	0%	0%	8.3%	0%	16.7%	8.3%	25.0%	16.7%	9.4%
Ham Street/ Back Lane	5.6%	16.7%	11.1%	16.7%	22.2%	11.1%	16.7%	22.2%	15.3%
Hampton Nursery Lands	0%	0%	0%	0%	9.1%	8.3%	9.1%	9.1%	4.5%
Hospital Bridge Road	0%	0%	0%	0%	0%	0%	0%	0%	0.0%
Kew Green	5.3%	5.3%	5.3%	15.8%	0%	5.3%	5.3%	5.3%	5.9%
Kew Road	2.9%	0%	2.9%	2.9%	8.6%	2.9%	8.6%	8.6%	4.6%
Lower Mortlake Road	0%	0%	0%	4.5%	0%	13.6%	13.6%	13.6%	5.7%
Nelson Road	18.2%	9.1%	18.2%	18.2%	27.3%	9.1%	9.1%	9.1%	14.8%
Sandycombe Road	7.0%	4.7%	5.1%	7.7%	10.3%	10.3%	5.3%	7.9%	7.3%
Strawberry Hill	14.3%	0%	0%	0%	0%	0%	0%	0%	1.8%
Twickenham Green	23.8%	14.3%	11.4%	4.5%	9.1%	4.5%	6.8%	9.1%	10.4%
Waldegrave Road	13.3%	6.7%	6.7%	13.3%	13.3%	6.7%	6.7%	13.3%	10.0%
St Margarets Road	27.3%	18.2%	9.1%	9.1%	18.2%	7.1%	14.3%	14.3%	14.7%
Whitton Road	0%	6.7%	26.7%	26.7%	33.3%	13.3%	16.7%	0%	15.4%
Grand Total	8.9%	6.0%	7.1%	7.9%	10.8%	7.9%	9.8%	9.8%	8.5%