

Twickenham Rediscovered

Retail and Business Workshops 22 August 2016

Facts and figures – what you have heard in the presentation

NOTE: Whilst the data presented in this fact sheet is based on the latest available information, not all of the data is up to date. Different sources of information have been used to compile this fact sheet, see the accompanying presentation for a list of sources used.

Retail offer:

- Twickenham provides for local shopping needs
- Around 275 shop units in Twickenham (of which there are around 6,000sqm of convenience floorspace and 12,500sqm of comparison floorspace)
- Limited non-food retail offer
- Independent retailers
- Large number of charity shops
- 'Al fresco' dining
- Nearly 4,000sqm of pubs and restaurants
- Nearly 2,000sqm of cafés (growing sector)

Convenience shops: sell things we use every day, such as milk and newspapers. These shops are usually close to people's homes so people can make many visits during the week. Food and non-alcoholic beverages, tobacco, alcoholic beverages, newspapers and periodicals and non-durable household goods.

Comparison shops: sell any other goods, including clothing, shoes, furniture, household appliances, tools, medical goods, games and toys, books and stationery, jewellery etc.

Retail Needs Study: carried out by Nathaniel Lichfield & Partners in November 2014; this indicates there is an indicative need of 3,200sqm (gross) of retail floorspace by 2024 in Twickenham:

- scope for about 700sqm gross of convenience goods floorspace (A1 use class)
- scope for about 1,600sqm gross of comparison goods floorspace (A1 use class)
- scope for around 900sqm floorspace of Use Class A3 (restaurants and cafes), A4 (drinking establishments e.g. public house, wine-bar) A5 (hot food takeaways)

Across borough's centres: scope for about 4,000sqm gross of convenience goods floorspace (Use Class A1), 11,500sqm gross of comparison goods floorspace (Use Class A1) and 6,500sqm gross of Class A3/A4/A5 floorspace. Total of 22,000sqm.

There is also a need to provide an estimated 4,250sqm (gross) of Use Class A3/A4/A5 floorspace outside of the five main centres.

A reasonable proportion of retail need in Twickenham could be accommodated in vacant premises, which along with site allocations included in the Area Action Plan will meet the identified need. A short-term priority should be the reoccupation of vacant shop units, then locating retail in allocated sites.

Vacancy rates:

- July 2016: 17 vacancies; 5.7% vacancy rate
- July 2015: 25 vacancies; 8.4% vacancy rate
- Shows a noticeable drop from last year, where there were 25 vacant units (8.4%)

- Previous years: there were 30 vacancies in 2011, 26 in 2012, 32 in 2013; since 2013, rates have dropped, back to 28 in 2014
- National average: 12.4% (July 2016)

Employment needs and loss of offices:

As a result of Government's changes to Permitted Development Rights, which allow the change of use from office to residential (introduced in May 2013), there have been:

- 248 prior approval applications that were approved or allowed on appeal across the whole borough; out of these, 28 (c. 11%) within Twickenham town centre only
- If all prior approvals were implemented, the loss of office floorspace is 84,635sqm borough-wide, and within Twickenham town centre, 11,721sqm. That is nearly 15% of borough-wide total and shows that Twickenham has been particularly hard hit by the Government changes to Permitted Development Rights.
- This amounts to an estimated loss of 29% of overall office floorspace in the borough since the introduction of the PD right in May 2013 (i.e. Twickenham's contribution to this figure is 4%).
- Analysis shows that nearly 55% of prior approvals have already been or have started to be implemented; this implementation rate is significantly above the average for London, which is 27%.

Note that above figures include Bridge House, which is now occupied by Haymarket.

Mayor of London's Employment Projections (2015): estimate that number of jobs in the borough will be 105,000 by 2031 and 109,000 by 2036. This equates to a significant increase in 18,000 jobs between 2011 and 2031; suggests very strong demand for employment space.

Employment changes and challenges:

- Heavy out-commuting (approx. 60% of the working population)
- Entrepreneurial borough (92.4% micro enterprises)
- Tech business growth (highest concentration of tech jobs in London)
- Home-based business
- Changing work/lifestyles