

Background paper to support retail need figures specified in Brentford Area Action Plan

The basis for determining how much retail floorspace is needed in Brentford town centre has involved quantitative and qualitative assessments of floorspace need, environmental characteristics, the policy context and comparative analysis with other district centres across West London and London.

Retail need (quantitative)

According to the *West London Joint Retail Needs Study 2006*, Brentford has a need for up to **2,853 sq m** of retail floorspace (convenience and comparison) by 2021. This is based on the existing retention of available expenditure from the town centre's own zone¹ of 8.4% for comparison goods and 38% for convenience goods.

A large proportion of the expenditure available from the town centre's own zone and the surrounding zones currently goes to out of centre stores. This expenditure is potentially available if there is an enhanced retail offer in the town centre.

Assuming there is additional population growth in Brentford of 10,239² and the expenditure captured from the town centre's own zone increases to 10.6% (from 8.4%) and 54.7% (from 38%)³ for comparison and convenience goods respectively, the need for additional retail floorspace will increase to between **3,920 sq m** and **6,460 sq m** by 2021.

The figures on how much need may be required exclude service uses. Whilst the *West London Joint Retail Needs Study 2006* makes the assumption that 15% of new comparison retail schemes will comprise leisure uses (including A3/A4), any need for floorspace for other service uses is additional to convenience and comparison floorspace. On average, service uses comprise 21% of the floorspace of all district centres across London. However, a proportion of this is accounted for as A3/A4 uses.

Position of Brentford in the context of other 'district centres' across West London and London

Total retail (convenience, comparison, services) floorspace

According to the *London-wide Town Centre Health checks 2006 analysis* (GLA), Brentford Town Centre's total retail floorspace (including service floorspace) is **10,033 sq m** the breakdown which is as follows:

¹ This refers to the immediate area surrounding the town centre that forms a zone (part of the town centre's catchment) as defined in the Retail Needs Study. There are 30 zones defined across London Boroughs of Hounslow, Hammersmith & Fulham and Ealing for the purposes of the Retail needs study that are based on postcode boundaries.

² The growth in population of 10,239 takes into account housing developments since 2001 together with housing proposals in the pipeline. This is additional to trend based growth, which does not take into account recent housing developments.

³ Assumption that the retention of expenditure from Brentford town centre's own zone increases to be equivalent to Feltham Town Centre, the district centre with the highest retention of expenditure from its own zone relative to other district centres in the London Boroughs of Ealing, Hammersmith & Fulham and Hounslow.

Comparison sq m	Convenience. sq m	Service sq m	All retail sq m
4,423	4,160	1,450	10,033

The proposed town centre in the Brentford Area Action Plan (amended) comprises **12,512 sq m** of floorspace.

Comparison sq m	Convenience. sq m	Service sq m	Vacant	All retail sq m
2,855	3,580	4,617	1,460	12,512

Across London as a whole, the average district centre is 16,331 sq m, 3,819 sq m more than the town centre's total floorspace according to the proposed town centre boundary.

In a West London context, the average district centre is 14,948 sq m, 2,436 sq m more than the town centre's total floorspace according to the proposed town centre boundary.

Therefore, to bring Brentford in line with the average size of a district centre, there would be a need for between **2,436 and 3,819 sq m** of retail floorspace.

Retail offer

Brentford's attractiveness as a shopping destination is due in part to the retail offer. In assessment of district centres in the West London Joint Retail Needs Study 2006 Brentford was ranked 5th out of 6 district centres according to the following criteria:

- Catchment population
- Shopping population
- Shopping population as a proportion of catchment population
- Comparison goods turnover
- Current published retailer requirements
- Quantum of comparison goods floorspace
- Quantum of convenience goods floorspace
- Total retail floorspace

Brentford's offer was summarised in the *West London Joint Retail Needs Study 2006* as follows

"The centre's convenience offer is limited to the Somerfield store... There could be the potential to strengthen and improve the centre's overall food and convenience offer to better meet the needs of its local resident population ...

The range and choice of comparison goods and fashion retailers and multiple operators is also limited"

This is reflected in the *London-wide Town Centre Health checks 2006 analysis* which showed that 35% of the total floorspace in Brentford is occupied by multiples relative to an average of 44% for district centres across London.

The town centre could therefore be enhanced through a greater amount of floorspace in a variety of uses.

Sustainability

Transport corridors for walking, cycling, public transport, train and private vehicle influence the level of accessibility between Brentford Town Centre and the residential areas surrounding the centre. This together with other factors will strongly influence the proportion of residents shopping in Brentford Town Centre from the surrounding catchment.

Retail (convenience and comparison), leisure and other uses in other centres and out of centre may attract residents further afield but with an enhanced retail offer residents may be attracted to Brentford town centre ahead of other shopping destinations. Through being in close proximity to Brentford Town Centre ahead of other centres, more sustainable travel patterns can be encouraged if residents are shopping locally.

Conclusions

There are assumptions that can be made regarding the future population within the Brentford Town Centre catchment, the future spend in Brentford Town Centre from this catchment and therefore any additional need for retail floorspace that may arise from a higher retention of spend. Whilst there are such uncertainties, there is clear evidence that additional expenditure could be captured contributing to increased need for floorspace. The quantum will depend on the retention of spend from Brentford's own zone (as presented in the *West London Joint Retail Needs Study*) together with a higher retention of spend from zones surrounding the town centre given a large proportion is currently going to out of centre stores.

The quality and offer of new retail floorspace together with improvements in accessibility will influence the proportion of expenditure in Brentford Town Centre from the surrounding catchment. Despite uncertainties there is a definitive need that can encourage more sustainable patterns of travel in Brentford.

Consultants have concluded that between 3,930 sq m and 6,460 sq m of additional retail floorspace (convenience and comparison) would fulfil need if retention of spend increased from Brentford Town Centre's own zone to a level comparable with Hounslow's other District Centre, Feltham. However, there is potential for additional need as Brentford is currently under performing with a low retention of spend from its own zone and surrounding zones. There are currently significant amounts of expenditure going to out of centre stores that could potentially be retained in Brentford Town Centre.

In qualitative terms there is a minimal range of uses in the town centre and a further increase above quantitative need would better serve the needs of its population and be more sustainable than only being able to provide consumer needs in out of centre locations.

An increase in 5,000 – 6,000 sq m of floorspace would address the need identified earlier whilst also making Brentford Town Centre comparable to other district centres in having a similar proportion of retail floorspace. This reflects the policy approach set

out in BAAP3 which seeks to ensure development contributes the role of Brentford as a district town centre and the variety of the retail offer and consumer choice for the local community.
