



Retail & Town Centre Needs Study – 2024 Update

Client: London Borough of Hounslow
Date: January 2024

Volume 2 of 2
Appendices

Appendices

Appendix A: Population and Retail Expenditure Statistical Tables

Appendix B: Convenience Goods Capacity Statistical Tables

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Appendix A: Population and Retail Expenditure Statistical Tables

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 1: Population Growth, by Zone

Zone	2024	2029	2034	2037	2043	Change 2024-2029		Change 2024-2034		Change 2024-2037		Change 2024-2043	
						No.	%	No.	%	No.	%	No.	%
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]	[9]	[10]	[11]	[12]	[13]
1	50,154	50,330	50,549	50,734	51,359	176	0.4	395.0	0.8	580	1.2	1,205	2.4
2	30,630	30,807	30,980	31,049	31,281	177	0.6	350.0	1.1	419	1.4	651	2.1
3	39,910	40,087	40,353	40,575	41,046	177	0.4	443.0	1.1	665	1.7	1,136	2.8
4	66,745	67,157	67,545	67,881	68,815	412	0.6	800.0	1.2	1,136	1.7	2,070	3.1
5	42,980	43,155	43,277	43,398	43,739	175	0.4	297.0	0.7	418	1.0	759	1.8
6	29,576	29,621	29,798	29,937	30,276	45	0.2	222.0	0.8	361	1.2	700	2.4
7	48,781	48,307	47,946	47,946	47,858	-474	-1.0	-835.0	-1.7	-835	-1.7	-923	-1.9
Total	308,776	309,464	310,448	311,520	314,374	688	0.2	1,672	0.5	2,744	0.9	4,667	1.5

Notes:

Population figures derived from Experian MMG3 data (December 2023) based on 2011 Census (upto 2041 only)
Population figures post 2041 are based on year on year population growth in each zone for the period 2036-2041

- [6] = [2] - [1]
- [7] = [6] / [1]
- [8] = [3] - [1]
- [9] = [8] / [1]
- [10] = [4] - [1]
- [11] = [10] / [1]
- [12] = [5] - [1]
- [13] = [12] / [1]

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 2: Per Capita Convenience Goods Expenditure, by Zone (£)

Zone	2024	2029	2034	2037	2043
1	1,632	1,613	1,614	1,622	1,636
2	1,804	1,783	1,784	1,793	1,809
3	1,848	1,826	1,827	1,836	1,852
4	1,659	1,640	1,641	1,649	1,663
5	1,975	1,952	1,954	1,963	1,980
6	2,175	2,150	2,151	2,162	2,181
7	2,997	2,962	2,964	2,979	3,005

Notes

Per capita expenditure derived from Experian MMG3 data (December 2023)

Per capita expenditure projected forward using forecast growth rates taken from Experian Retail Planner Briefing Note 20 (February 2023)

Forecast growth rates for years 2041-2043 not provided by Experian - AK Planning has assessed growth in these years to be the same as 2040 growth rate

Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 20 (February 2023)

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 3: Total Available Convenience Expenditure, by Zone (£m)

Zone	2024	2029	2034	2037	2043	Change 2024-29		Change 2024-2034		Change 2024-2037		Change 2024-2043	
	[1]	[2]	[3]	[4]	[5]	No.	%	No.	%	No.	%	No.	%
1	81.9	81.2	81.6	82.3	84.0	-0.7	-0.8	-0.3	-0.3	0.4	0.5	2.2	2.7
2	55.3	54.9	55.3	55.7	56.6	-0.3	-0.6	0.0	0.0	0.4	0.7	1.3	2.4
3	73.7	73.2	73.7	74.5	76.0	-0.5	-0.7	0.0	0.0	0.8	1.0	2.3	3.1
4	110.7	110.1	110.8	111.9	114.5	-0.6	-0.6	0.1	0.1	1.2	1.1	3.7	3.4
5	84.9	84.3	84.5	85.2	86.6	-0.6	-0.8	-0.4	-0.4	0.3	0.4	1.7	2.0
6	64.3	63.7	64.1	64.7	66.0	-0.7	-1.0	-0.2	-0.4	0.4	0.6	1.7	2.6
7	146.2	143.1	142.1	142.8	143.8	-3.1	-2.1	-4.1	-2.8	-3.4	-2.3	-2.4	-1.6
Total	617.0	610.5	612.2	617.1	627.6	-6.5	-1.1	-4.8	-0.8	0.1	0.0	10.5	1.7

Notes

[1] to [5] Calculated by multiplying population (Table 1) by per capita convenience goods expenditure (Table 2)

[6] = [2] - [1]

[7] = [6] / [1]

[8] = [3] - [1]

[9] = [8] / [1]

[10] = [4] - [1]

[11] = [10] / [1]

[12] = [5] - [1]

[13] = [12] / [1]

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 4a - Per Capita Comparison Goods Expenditure, by Category, 2022 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1	546	101	107	73	38	182	288	67	152	90	181	1,826
2	573	110	110	80	46	226	270	70	163	106	173	1,929
3	623	118	116	87	55	254	281	75	177	119	178	2,083
4	576	109	106	88	68	215	306	67	164	96	177	1,971
5	651	146	126	108	82	256	303	95	209	135	231	2,342
6	757	164	121	127	85	277	375	98	214	139	210	2,566
7	900	255	128	182	104	340	510	150	259	219	257	3,302

Table 4b - Per Capita Comparison Goods Expenditure, by Category, 2024 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1	533	99	105	71	37	178	281	66	148	88	176	1,783
2	560	107	107	79	45	221	263	69	159	104	169	1,883
3	608	115	113	85	54	248	275	73	172	116	174	2,033
4	562	106	103	86	67	210	298	65	160	94	172	1,924
5	636	142	123	105	80	250	296	92	204	132	225	2,286
6	739	160	119	124	83	270	366	96	209	135	205	2,505
7	878	249	125	177	101	331	497	146	253	213	251	3,223

Table 4c: Per Capita Comparison Goods Expenditure, by Category, 2029 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1	569	105	112	76	40	190	300	70	158	94	188	1,902
2	597	115	115	84	48	236	281	73	170	111	181	2,009
3	649	123	121	91	58	265	293	78	184	123	185	2,169
4	600	114	110	92	71	224	318	69	170	100	184	2,053
5	678	152	132	112	85	267	315	99	217	141	241	2,439
6	788	171	126	132	88	288	391	102	223	144	219	2,672
7	937	266	134	189	108	354	531	156	270	228	267	3,439

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 4d: Per Capita Comparison Goods Expenditure, by Category, 2034 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1	646	120	127	87	45	215	341	80	180	107	214	2,161
2	678	130	130	95	54	268	319	83	193	126	205	2,282
3	737	140	137	103	66	301	333	88	209	140	211	2,465
4	682	129	125	104	81	255	362	79	194	113	209	2,332
5	771	173	150	128	97	303	358	112	247	160	273	2,771
6	895	194	144	150	100	327	444	116	253	164	248	3,036
7	1,065	302	152	215	123	402	603	177	306	259	304	3,907

Table 4e: Per Capita Comparison Goods Expenditure, by Category, 2037 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1	702	130	138	94	49	234	370	86	195	116	232	2,346
2	737	141	141	103	59	291	347	90	209	137	223	2,478
3	800	152	149	112	71	327	361	96	227	152	229	2,676
4	740	140	136	113	88	276	393	86	210	123	227	2,532
5	837	187	162	139	105	329	389	122	268	173	297	3,009
6	972	211	156	163	109	355	482	126	275	178	270	3,296
7	1,156	328	165	233	133	436	655	192	333	281	330	4,242

Table 4f: Per Capita Comparison Goods Expenditure, by Category, 2043 (£)

Zone	Expenditure Category											Total Per Capita Expenditure
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings	
1	833	154	164	112	58	278	439	103	231	138	276	2,785
2	874	168	168	123	70	345	411	107	249	162	264	2,942
3	950	180	177	133	85	388	429	114	269	181	272	3,177
4	879	166	161	135	104	328	466	102	250	146	269	3,006
5	993	222	193	165	125	391	462	144	318	206	352	3,571
6	1,154	250	185	194	129	422	572	149	326	211	320	3,913
7	1,372	389	196	277	158	518	777	228	395	333	392	5,035

Notes

2022 base expenditure taken from Experian MMG3 data (December 2023)

Per capita expenditure projected forward using forecast growth rates taken from Experian Retail Planner Briefing Note 20 (February 2023)

Forecast growth rates for years 2041-2043 not provided by Experian - AK Planning has assessed growth in these years to be the same as 2040 growth rate

Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 20 (February 2023)

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 5a: Total Comparison Goods Expenditure, by Category, 2024 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1	26.7	5.0	5.3	3.6	1.9	8.9	14.1	3.3	7.4	4.4	8.8
2	17.1	3.3	3.3	2.4	1.4	6.8	8.1	2.1	4.9	3.2	5.2
3	24.3	4.6	4.5	3.4	2.2	9.9	11.0	2.9	6.9	4.6	6.9
4	37.5	7.1	6.9	5.8	4.4	14.0	19.9	4.3	10.7	6.2	11.5
5	27.3	6.1	5.3	4.5	3.4	10.8	12.7	4.0	8.8	5.7	9.7
6	21.8	4.7	3.5	3.7	2.4	8.0	10.8	2.8	6.2	4.0	6.1
7	42.9	12.2	6.1	8.6	4.9	16.2	24.3	7.1	12.3	10.4	12.2
Total	197.7	43.0	34.9	32.0	20.7	74.5	100.8	26.6	57.1	38.5	60.5

Table 5b: Total Comparison Goods Expenditure, by Category, 2029 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1	28.6	5.3	5.6	3.8	2.0	9.5	15.1	3.5	8.0	4.7	9.5
2	18.4	3.5	3.5	2.6	1.5	7.3	8.7	2.3	5.2	3.4	5.6
3	26.0	4.9	4.8	3.6	2.3	10.6	11.7	3.1	7.4	4.9	7.4
4	40.3	7.6	7.4	6.2	4.8	15.0	21.4	4.7	11.4	6.7	12.4
5	29.3	6.6	5.7	4.9	3.7	11.5	13.6	4.3	9.4	6.1	10.4
6	23.3	5.1	3.7	3.9	2.6	8.5	11.6	3.0	6.6	4.3	6.5
7	45.3	12.8	6.5	9.1	5.2	17.1	25.6	7.5	13.0	11.0	12.9
Total	211.2	45.9	37.3	34.1	22.1	79.6	107.7	28.4	61.0	41.1	64.6

**LONDON BOROUGH OF HOUNSLOW
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Table 5c: Total Comparison Goods Expenditure, by Category, 2034 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1	32.7	6.1	6.4	4.4	2.3	10.9	17.2	4.0	9.1	5.4	10.8
2	21.0	4.0	4.0	2.9	1.7	8.3	9.9	2.6	6.0	3.9	6.4
3	29.7	5.6	5.5	4.2	2.6	12.1	13.4	3.6	8.4	5.7	8.5
4	46.1	8.7	8.5	7.1	5.5	17.2	24.4	5.3	13.1	7.7	14.1
5	33.4	7.5	6.5	5.5	4.2	13.1	15.5	4.9	10.7	6.9	11.8
6	26.7	5.8	4.3	4.5	3.0	9.7	13.2	3.5	7.5	4.9	7.4
7	51.1	14.5	7.3	10.3	5.9	19.3	28.9	8.5	14.7	12.4	14.6
Total	240.6	52.2	42.5	38.8	25.1	90.7	122.6	32.3	69.5	46.8	73.6

Table 5d: Total Comparison Goods Expenditure, by Category, 2037 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1	35.6	6.6	7.0	4.8	2.5	11.9	18.8	4.4	9.9	5.9	11.8
2	22.9	4.4	4.4	3.2	1.8	9.0	10.8	2.8	6.5	4.2	6.9
3	32.5	6.2	6.0	4.5	2.9	13.3	14.7	3.9	9.2	6.2	9.3
4	50.3	9.5	9.2	7.7	6.0	18.8	26.7	5.8	14.3	8.4	15.4
5	36.3	8.1	7.1	6.0	4.6	14.3	16.9	5.3	11.6	7.5	12.9
6	29.1	6.3	4.7	4.9	3.3	10.6	14.4	3.8	8.2	5.3	8.1
7	55.4	15.7	7.9	11.2	6.4	20.9	31.4	9.2	15.9	13.5	15.8
Total	262.0	56.8	46.3	42.3	27.4	98.8	133.6	35.2	75.7	51.0	80.2

Table 5e: Total Comparison Goods Expenditure, by Category, 2041 (£m)

Zone	Expenditure Category										
	Clothing & Footwear	Books/CD's/ DVD's	Furnishings & Textiles	Small Household Goods	Clocks, J'lery & Watches	Recreational Goods	Chemist Goods	Large Electrical	Small Electrical Appliances	DIY & Gardening	Furniture & Floorcoverings
1	42.8	7.9	8.4	5.7	3.0	14.3	22.6	5.3	11.9	7.1	14.2
2	27.4	5.2	5.3	3.8	2.2	10.8	12.9	3.4	7.8	5.1	8.3
3	39.0	7.4	7.3	5.4	3.5	15.9	17.6	4.7	11.1	7.4	11.1
4	60.5	11.4	11.1	9.3	7.2	22.6	32.1	7.0	17.2	10.1	18.5
5	43.4	9.7	8.4	7.2	5.5	17.1	20.2	6.3	13.9	9.0	15.4
6	34.9	7.6	5.6	5.9	3.9	12.8	17.3	4.5	9.9	6.4	9.7
7	65.7	18.6	9.4	13.3	7.6	24.8	37.2	10.9	18.9	15.9	18.7
Total	313.7	68.0	55.4	50.6	32.7	118.2	159.8	42.1	90.6	61.0	96.0

Notes:

Total Expenditure = Population for each zone (Table 1) multiplied by per capita expenditure for each zone (Table 4b-4f)

2021 Prices

Appendix B: Convenience Goods Capacity Statistical Tables

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 1: Main and Top Up Food Shopping Market Share of Convenience Facilities by Zone, 2024 (%)

	Zones													
	1		2		3		4		5		6		7	
	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up
LONDON BOROUGH OF HOUNSLOW														
Hounslow Town Centre	27	33			0	1	29	44	15	9	2	1	3	1
Asda, The Blenheim Centre	16	7					22	22	15	7	2	2	3	3
Iceland, High Street	6	8					1	8	0	1				1
Other stores	6	17			0	1	6	13		1		1		
Hounslow Edge/Out of Centre	14	25	1	1	0	2	5	14	4	1	0		1	
Aldi, Hospital Road	6		1	1	0		4	1	3	1			1	
Sainsbury's Local, Staines Road		6						2						
Tesco Express, Hanworth Road	5	9				2	0	4	0	1				
Tesco Express, Bath Road	0	2						6	0					
Iceland, Bath Road	2	7					1	1			0			
Chiswick Town Centre			1		0		0		3	1	7	3	62	68
M&S Simply Food, Chiswick High Road					0				1	1	1	1	7	11
Sainsbury's Local, Chiswick High Road									0			1	4	2
Sainsbury's, Essex Place			1				0		2		4		41	18
Tesco Express, Chiswick High Road											2		0	3
Waitrose, Chiswick High Road									1		0		7	13
Other stores											1	2	4	21
Chiswick Edge/Out of Centre											0			13
Budgens, South Parade											0			11
Other stores														1
Brentford Town Centre	2	3		1		1	1		2		41	61	1	1
Morrisons, High Street	2	3				1	1		2		39	48	1	1
Other stores				1							1	13		
Brentford Edge/Out of Centre	5	1	2				20	8	37	20	26	3	6	
Tesco Extra, Syon Lane, Osterley Park, Isleworth	5	1	2				20	8	37	20	26	3	6	
Feltham Town Centre	2		39	32	57	44	0	1	0	1	1			
Lidl, New Road	1		10	7	2	1	0				0			
Aldi, High Street			8	1	17	9		1						
Asda, The Centre, Tilley Road	1		9	8	8	11								
Iceland, The Centre, Tilley Road			1		2			1	0			1		
Tesco, High Street			6	11	23	18				1				
Other stores			4	4	4	5								
Feltham Edge/Out of Centre	14	5	48	46	11	8	6		1					
Tesco, Dukes Green Avenue	14	5	46	30	8	7	5		1					
Tesco Express, Staines Road, Turpin Green Lane			2	15	3	1	0		1					
Other stores						1								
Other stores in Borough	30	30	1	11	8	20	24	22	29	64	4	12	0	4
Tesco Extra, Mogden Lane, Twickenham, Isleworth	0	1			0	1	11	4	18	13	1			1
Tesco Extra, Bullsbridge Industrial Estate, Hayes Road, Southall	28	6			2	1	5							
Sainsbury's Local, London Road, Isleworth									8	17		2		
Tesco Express, London Road, Isleworth							1	2	0	18	2			
Tesco Express, Staines Road, Hounslow		3					2	4	0					
Tesco Express, Bear Road, Feltham				1	5	5								
Tesco Express, 507-511 Staines Road, Feltham	0		1	8		2								
Sainsbury's Local, Upper Sutton Lane, Hounslow		2						6						
Tesco Express, North Hyde Lane, Southall		5					2	1						
Sainsbury's Local, Kew Bridge Road, Brentford										3		2	0	2
Sainsbury's Local, Ealing Road, Brentford											0	6		
Tesco Express, Hampton Road West, Feltham	0			1		6	0							
Asda, Ivy Bridge Retail Park, Twickenham								1	2	2				
Co-op, The Kings Arms, South Street, Isleworth									1	6				
Other	1	14		1		6	3	6		5		2		1
Outside Survey Area	7	5	9	9	24	24	14	10	8	4	18	20	27	14
Sainsbury's, St Clares, Uxbridge Road, Hampton Hill	0		1		7	15	1							
Sainsbury's Local, Boston Parade, Boston Road, Hanwell												7		
Lidl, High Street, Whitton, Twickenham							1	1	5	2	0			
Marks & Spencer, Kew Retail Park, Mortlake Road, Kew	0						1		2	1	1	1	2	1
Sainsbury's Local, The Green, Twickenham							5							
Sainsbury's, Lower Richmond Road, Richmond											1		6	2
Tesco Express, Upper Richmond Road West, East Sheen													6	8
Tesco Extra, Escot Road, Sunbury-on-Thames	0			1	9	1								
Waitrose, Westfield Shopping Centre, White City					8	8	7	10	2	1	15	11	6	7
Other	6	5	8	9	8	8	7	10	2	1	15	11	7	3
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Notes:
 Main food market share figure derived from a 50:50 combined figure between Questions 1 & 2, NEMS Household Survey, May 2018
 Top-up market share figure derived from Question 5, NEMS Household Survey, May 2018
 Excludes responses 'don't do this', 'don't know / varies', 'abroad', and 'internet / delivered'
 Figures may not add due to rounding
2022 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 2: Main and Top Up Food Shopping Turnover of Convenience Facilities, 2024 (£m)

	Zones													
	1		2		3		4		5		6		7	
	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up
LONDON BOROUGH OF HOUNSLOW														
Hounslow Town Centre	15.4	8.0			0.2	0.2	22.5	14.5	9.1	2.3	1.0	0.2	3.1	0.3
Asda, The Blenheim Centre	8.9	1.8					16.7	7.5	9.0	1.9	1.0		3.1	
Iceland, High Street	3.2	2.0					1.0	2.7	0.2	0.3				0.3
Other stores	3.2	4.2			0.2	0.2	4.9	4.3		0.2		0.2		
Hounslow Edge/Out of Centre	7.8	6.1	0.2	0.1	0.1	0.5	4.1	4.7	2.3	0.3	0.2		0.8	
Aldi, Hospital Road	3.5		0.2	0.1	0.1		3.0	0.4	2.0	0.2			0.8	
Sainsbury's Local, Staines Road		1.5						0.7						
Tesco Express, Hanworth Road	2.7	2.3				0.5	0.4	1.5	0.1	0.2				
Tesco Express, Bath Road	0.2	0.4						2.0	0.1					
Iceland, Bath Road	1.3	1.8					0.8	0.2			0.2			
Chiswick Town Centre			0.2		0.2		0.2		2.0	0.2	3.4	0.5	63.7	29.8
M&S Simply Food, Chiswick High Road					0.2				0.3	0.2	0.3		6.7	4.9
Sainsbury's Local, Chiswick High Road									0.2			0.2	3.6	0.9
Sainsbury's, Essex Place			0.2				0.2		1.3		1.8		42.0	7.9
Tesco Express, Chiswick High Road											0.7		0.3	1.3
Waitrose, Chiswick High Road									0.3		0.2		6.8	5.6
Other stores											0.3	0.3	4.4	9.2
Chiswick Edge/Out of Centre											0.2			5.6
Budgens, South Parade											0.2			5.0
Other stores														0.6
Brentford Town Centre	1.1	0.6		0.1		0.1	0.8		0.9		18.3	11.8	0.9	0.6
Morrisons, High Street	1.1	0.6				0.1	0.8		0.9		17.7	9.3	0.9	0.6
Other stores				0.1							0.6	2.5		
Brentford Edge/Out of Centre	2.7	0.1	0.7				15.9	2.8	22.0	5.2	11.7	0.6	6.1	
Tesco Extra, Syon Lane, Osterley Park, Isleworth	2.7	0.1	0.7				15.9	2.8	22.0	5.2	11.7	0.6	6.1	
Feltham Town Centre	0.9		15.0	5.4	29.2	9.6	0.4	0.4	0.3	0.2	0.6			
Lidl, New Road	0.3		3.7	1.2	1.3	0.1	0.4				0.2			
Aldi, High Street			3.2	0.2	8.9	2.0		0.2						
Asda, The Centre, Tilley Road	0.5		3.6	1.4	4.0	2.5								
Iceland, The Centre, Tilley Road			0.4		1.2			0.2	0.3			0.4		
Tesco, High Street			2.4	1.9	11.8	4.0				0.2				
Other stores			1.6	0.7	2.0	1.0								
Feltham Edge/Out of Centre	8.1	1.2	18.8	7.5	5.5	1.9	4.4		0.6					
Tesco, Dukes Green Avenue	8.1	1.2	17.9	5.0	4.1	1.5	4.0		0.3					
Tesco Express, Staines Road, Turpin Green Lane			0.8	2.6	1.3	0.1	0.3		0.3					
Other stores						0.3								
Other stores in Borough	17.5	7.4	0.2	1.9	4.0	4.4	18.4	7.5	17.4	16.2	1.7	2.4	0.3	1.7
Tesco Extra, Mogden Lane, Twickenham, Isleworth	0.2	0.1			0.1	0.3	8.8	1.2	10.5	3.3	0.4			0.3
Tesco Extra, Bullsbridge Industrial Estate, Hayes Road, Southall	16.1	1.6			1.1	0.1	3.7							
Sainsbury's Local, London Road, Isleworth									4.7	4.2		0.5		
Tesco Express, London Road, Isleworth							0.5	0.7	0.1	4.7	1.1			
Tesco Express, Staines Road, Hounslow		0.6		0.1			1.5	1.3	0.3					
Tesco Express, Bear Road, Feltham				0.1	2.8	1.1								
Tesco Express, 507-511 Staines Road, Feltham	0.2		0.2	1.3		0.4								
Sainsbury's Local, Upper Sutton Lane, Hounslow		0.4						2.0						
Tesco Express, North Hyde Lane, Southall		1.3					1.6	0.2						
Sainsbury's Local, Kew Bridge Road, Brentford										0.8		0.3	0.3	1.0
Sainsbury's Local, Ealing Road, Brentford											0.2	1.1		
Tesco Express, Hampton Road West, Feltham	0.2			0.1		1.2	0.3							
Asda, Ivy Bridge Retail Park, Twickenham								0.2	1.3	0.6				
Co-op, The Kings Arms, South Street, Isleworth									0.6	1.4				
Other	0.7	3.4		0.2		1.3	2.0	1.8		1.2		0.5		0.3
Outside Survey Area	3.8	1.1	3.6	1.5	12.4	5.3	10.9	3.5	4.9	1.1	8.0	3.8	27.3	6.0
Sainsbury's, St Clares, Uxbridge Road, Hampton Hill	0.1		0.5		3.6	3.3	0.8							
Sainsbury's Local, Boston Parade, Boston Road, Hanwell												1.4		
Lidl, High Street, Whitton, Twickenham							0.5	0.2	2.9	0.6	0.2			
Marks & Spencer, Kew Retail Park, Mortlake Road, Kew	0.1						0.7		1.0	0.2	0.3	0.2	2.2	0.3
Sainsbury's Local, The Green, Twickenham							3.5							
Sainsbury's, Lower Richmond Road, Richmond											0.6		5.7	0.9
Tesco Express, Upper Richmond Road West, East Sheen													6.3	3.4
Tesco Extra, Escot Road, Sunbury-on-Thames	0.1			0.1	4.7	0.3								
Waitrose, Westfield Shopping Centre, White City					4.1	1.7	5.4	3.3	0.9	0.2			6.3	
Other	3.4	1.1	3.0	1.4	4.1	1.7	5.4	3.3	0.9	0.2	7.0	2.2	6.9	1.4
Total	57.3	24.6	38.7	16.6	51.6	22.1	77.5	33.2	59.4	25.5	45.0	19.3	102.3	43.9

Notes:
 Total convenience goods expenditure per zone taken from Table 3
 Split in Main/Top-up expenditure derived from Questions 3 and 6, NEMS Household Survey, May 2018
 Excludes responses 'don't do this', 'don't know / varies', 'abroad', and 'internet / delivered'
 Figures may not add due to rounding
2022 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 3: Total Turnover of Convenience Facilities, 2024 (£m)

	Zones														Total Survey Derived Turnover (£m)
	1		2		3		4		5		6		7		
	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	
LONDON BOROUGH OF HOUNSLOW															
Hounslow Town Centre	29	23.4			1	0.5	33	37.0	13	11.4	2	1.2	2	3.4	76.9
Asda, The Blenheim Centre	13	10.7					22	24.2	13	10.8	2	1.0	2	3.1	49.8
Iceland, High Street	6	5.3					3	3.7	1	0.4			0	0.3	9.7
Other stores	9	7.4			1	0.5	8	9.1	0	0.2	0	0.2			17.4
Hounslow Edge/Out of Centre	17	13.8	1	0.3	1	0.6	8	8.9	3	2.6	0	0.2	1	0.8	27.3
Aldi, Hospital Road	4	3.5	1	0.3	0	0.1	3	3.4	3	2.2			1	0.8	10.4
Sainsbury's Local, Staines Road	2	1.5					1	0.7							2.2
Tesco Express, Hanworth Road	6	5.0			1	0.5	2	1.8	0	0.3					7.6
Tesco Express, Bath Road	1	0.6					2	2.0	0	0.1					2.8
Iceland, Bath Road	4	3.1					1	1.0			0	0.2			4.3
Chiswick Town Centre			0	0.2	0	0.2	0	0.2	3	2.2	6	3.9	64	93.5	100.2
M&S Simply Food, Chiswick High Road					0	0.2			1	0.5	0	0.3	8	11.6	12.5
Sainsbury's Local, Chiswick High Road									0	0.2	0	0.2	3	4.5	4.8
Sainsbury's, Essex Place			0	0.2			0	0.2	1	1.3	3	1.8	34	49.9	53.3
Tesco Express, Chiswick High Road											1	0.7	1	1.6	2.3
Waitrose, Chiswick High Road									0	0.3	0	0.2	9	12.5	12.9
Other stores											1	0.7	9	13.6	14.3
Chiswick Edge/Out of Centre											0	0.2	4	5.6	5.7
Budgens, South Parade											0	0.2	3	5.0	5.1
Other stores													0	1	0.6
Brentford Town Centre	2	1.7	0	0.1	0	0.1	1	0.8	1	0.9	47	30.1	1	1.5	35.4
Morrisons, High Street	2	1.7			0	0.1	1	0.8	1	0.9	42	27.0	1	1.5	32.1
Other stores			0	0.1							5	3.1			3.3
Brentford Edge/Out of Centre	3.5	2.9	1	0.7			17	18.6	32	27.1	19	12.4	4	6.1	67.7
Tesco Extra, Syon Lane, Osterley Park, Isleworth	4	2.9	1	0.7			17	18.6	32	27.1	19	12.4	4	6.1	67.7
Feltham Town Centre	1	0.9	37	20.4	53	38.8	1	0.7	1	0.4	1	0.6			61.8
Lidl, New Road	0	0.3	9	4.9	2	1.4	0	0.4			0	0.2			7.1
Aldi, High Street			6	3.5	15	10.9	0	0.2							14.6
Asda, The Centre, Tilley Road	1	0.5	9	5.0	9	6.5					1	0.4			12.5
Iceland, The Centre, Tilley Road			1	0.4	2	1.2	0	0.2							2.1
Tesco, High Street			8	4.3	21	15.8			0	0.2					20.3
Other stores			4	2.3	4	3.0									5.3
Feltham Edge/Out of Centre	11	9.3	48	26.3	10	7.3	4	4.4	1	0.6					47.9
Tesco, Dukes Green Avenue	11	9.3	42	22.9	8	5.6	4	4.0	0	0.3					42.2
Tesco Express, Staines Road, Turpin Green Lane			6	3.4	2	1.5	0	0.3	0	0.3					5.4
Other stores					0	0.3									0.3
Other stores in Borough	30	24.9	4	2.1	11	8.4	23	25.8	40	33.6	6	4.1	1	2.0	100.9
Tesco Extra, Mogden Lane, Twickenham, Isleworth	0	0.4			1	0.4	9	10.0	16	13.7	1	0.4	0	0.3	25.2
Tesco Extra, Bullsbridge Industrial Estate, Hayes Road, Southall	22	17.7			2	1.2	3	3.7							22.6
Sainsbury's Local, London Road, Isleworth									10	8.9	1	0.5			9.4
Tesco Express, London Road, Isleworth							1	1.3	6	4.8	2	1.1			7.2
Tesco Express, Staines Road, Hounslow	1	0.6	0	0.1			2	2.7	0	0.3					3.7
Tesco Express, Bear Road, Feltham			0	0.1	5	3.8									4.0
Tesco Express, 507-511 Staines Road, Feltham	0	0.2	3	1.5	0	0.4									2.1
Sainsbury's Local, Upper Sutton Lane, Hounslow	1	0.4					2	2.0							2.5
Tesco Express, North Hyde Lane, Southall	2	1.3					2	1.8							3.1
Sainsbury's Local, Kew Bridge Road, Brentford									1	0.8	1	0.3	1	1.3	2.4
Sainsbury's Local, Ealing Road, Brentford											2	1.3			1.3
Tesco Express, Hampton Road West, Feltham	0	0.2	0	0.1	2	1.2	0	0.3							1.9
Asda, Ivy Bridge Retail Park, Twickenham							0	0.2	2	1.9					2.1
Co-op, The Kings Arms, South Street, Isleworth									2	2.0					2.0
Other	5	4.0	0	0.2	2	1.3	3	3.8	1	1.2	1	0.5	0	0.3	11.4
Outside Survey Area	6	4.9	9	5.1	24	17.7	13	14.3	7	6.0	18	11.8	23	33.4	93.2
Sainsbury's, St Clares, Uxbridge Road, Hampton Hill	0	0.1	1	0.5	9	6.9	1	0.8							8.4
Sainsbury's Local, Boston Parade, Boston Road, Hanwell											2	1.4			1.4
Lidl, High Street, Whitton, Twickenham							1	0.7	4	3.5	0	0.2			4.4
Marks & Spencer, Kew Retail Park, Mortlake Road, Kew	0	0.1					1	0.7	1	1.2	1	0.4	2	2.6	5.0
Sainsbury's Local, The Green, Twickenham							3	3.5							3.5
Sainsbury's, Lower Richmond Road, Richmond											1	0.6	5	6.6	7.2
Tesco Express, Upper Richmond Road West, East Sheen													7	9.7	9.7
Tesco Extra, Escot Road, Sunbury-on-Thames	0	0.1	0	0.1	7	5.0									5.2
Waitrose, Westfield Shopping Centre, White City									0	0.2			4	6.3	6.4
Other	6	4.5	8	4.5	8	5.8	8	8.6	1	1.1	14	9.2	6	8.2	42.0
Total	100	81.7	100	55.3	100	73.7	100	110.8	100	84.9	100	64.3	100	146.3	617.0

Notes:
 Figures may not add due to rounding.
 Adjustments made to Sainsbury's Chiswick stores.
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Table 4. Survey-derived performance of convenience floorspace compared to expected benchmark performance at 2024

	Gross Floorspace (sq.m)	Net Sales (sq.m)	Net Convenience Sales Area (sq m)	Sales Density (£ per sq.m)	Benchmark Convenience Goods Turnover (£m)	Survey Turnover (£m)	Estimated Turnover from Outside Survey Area (£m)	Estimated Total Turnover (£m)	Overtrading (£m)
Hounslow Town Centre									
Asda, The Blenheim Centre	6,946	4,782	3,587	14,481	51.9	49.8	1.5	51.3	-0.6
Iceland, High Street	635	329	329	7,569	2.5	9.7	-	9.7	7.2
Other stores	-	-	-	-	17.4	17.4	-	17.4	-
Hounslow Edge/Out of Centre									
Aldi, Hospital Road	1,156	628	565	11,200	6.3	10.4	-	10.4	4.1
Sainsbury's Local, Staines Road	438	236	236	12,686	3.0	2.2	-	2.2	-0.8
Tesco Express, Hanworth Road	439	329	329	14,305	4.7	7.6	-	7.6	2.9
Tesco Express, Bath Road	364	254	254	14,305	3.6	2.8	-	2.8	-0.9
Iceland, Bath Road	903	420	420	7,569	3.2	4.3	-	4.3	1.1
Hounslow Sub-total	10,881	6,978			92.6	104.2	1.5	105.7	13.1
Chiswick Town Centre									
M&S Simply Food, Chiswick High Road	1,946	1,180	1,121	11,276	12.6	12.5	-	12.5	-0.1
Sainsbury's Local, Chiswick High Road	352	203	203	12,686	2.6	4.8	-	4.8	2.2
Sainsbury's, Essex Place	6,931	3,989	3,391	12,686	43.0	53.3	2.8	56.1	13.1
Tesco Express, Chiswick High Road	286	164	164	14,305	2.3	2.3	-	2.3	0.0
Waitrose, Chiswick High Road	1,779	1,017	966	14,981	14.5	12.9	0.7	13.6	-0.9
Other stores	-	-	-	-	14.3	14.3	-	14.3	-
Chiswick Edge/Out of Centre									
Budgens, South Parade	280	114	97	-	5.1	5.1	-	5.1	-
Other stores	-	-	-	-	0.6	0.6	-	0.6	-
Chiswick Sub-Total	11,574	6,667			95.1	105.9	3.5	109.4	14.3
Brentford Town Centre									
Morrisons, High Street	3,067	1,795	1,616	13,154	21.3	32.1	1.0	33.1	11.9
Other stores	-	-	-	-	3.3	3.3	-	3.3	-
Brentford Edge/Out of Centre									
Tesco Extra, Syon Lane, Osterley Park, Isleworth	11,754	8,058	4,835	14,305	69.2	67.7	2.1	69.8	0.6
Brentford Sub-total	14,821	9,853			93.7	103.1	3.1	106.2	12.5
Feltham Town Centre									
Lidl, New Road	1,477	1,046	941	8,884	8.4	7.1	-	7.1	-1.3
Aldi, High Street	978	678	610	11,200	6.8	14.6	-	14.6	7.7
Asda, The Centre, Tilley Road	9,084	5,372	3,868	14,481	56.0	12.5	0.7	13.1	-42.9
Iceland, The Centre, Tilley Road	837	581	581	7,569	4.4	2.1	-	2.1	-2.3
Tesco, High Street	3,945	2,579	2,192	14,305	31.4	20.3	1.1	21.4	-10.0
Other stores	-	-	-	-	5.3	5.3	-	5.3	-
Feltham Edge/Out of Centre									
Tesco, Dukes Green Avenue	7,772	4,880	3,416	14,305	48.9	42.2	2.2	44.4	-4.5
Tesco Express, Staines Road, Turpin Green Lane	350	244	244	14,305	3.5	0.2	-	0.2	-3.3
Other stores	-	-	-	-	0.3	0.3	-	0.3	-
Feltham Sub-total	24,443	15,380			164.9	104.5	3.9	108.4	-56.5
Other stores in Borough									
Tesco Extra, Mogden Lane, Twickenham, Isleworth	8,317	5,715	4,286	14,305	61.3	25.2	37.9	63.1	1.8
Tesco Extra, Bullsbridge Industrial Estate, Hayes Road, Southall	7,375	4,923	3,692	14,305	52.8	22.6	33.9	56.6	3.7
Sainsbury's Local, London Road, Isleworth	238	154	154	12,686	2.0	9.4	-	9.4	7.4
Tesco Express, London Road, Isleworth	364	254	254	14,305	3.6	7.2	-	7.2	3.6
Tesco Express, Staines Road, Hounslow	352	246	246	14,305	3.5	3.7	-	3.7	0.2
Tesco Express, Bear Road, Feltham	238	166	166	14,305	2.4	4.0	-	4.0	1.6
Tesco Express, 507-511 Staines Road, Feltham	403	227	227	14,305	3.2	2.1	-	2.1	-1.2
Sainsbury's Local, Upper Sutton Lane, Hounslow	418	310	310	12,686	3.9	2.5	-	2.5	-1.5
Tesco Express, North Hyde Lane, Southall	364	254	254	14,305	3.6	3.1	-	3.1	-0.5
Sainsbury's Local, Kew Bridge Road, Brentford	134	72	72	12,686	0.9	2.4	-	2.4	1.5
Sainsbury's Local, Ealing Road, Brentford	669	361	361	12,686	4.6	1.3	-	1.3	-3.3
Tesco Express, Hampton Road West, Feltham	121	85	85	14,305	1.2	1.9	-	1.9	0.7
Asda, Ivy Bridge Retail Park, Twickenham	1,998	1,455	1,164	14,481	16.9	2.1	3.2	5.3	-11.6
Co-op, The Kings Arms, South Street, Isleworth	341	222	200	11,170	2.2	2.0	-	2.0	-0.2
Other	-	-	-	-	11.4	11.4	-	11.4	-
Other Sub-total	21,332	14,444			174	100.9	75.0	175.8	2.2

Notes:

Gross floorspace derived from Retail Studies, Retail Impact Assessments, VOA website, Experian Goad or WYG assessment
Net convenience floorspace derived from above sources where available or based on WYG professional judgement having regard to Experian Goad Data/WYG visits
Sales densities derived from information provided by GlobalData.
It has been assumed that all unnamed convenience stores within a centre are 'trading at equilibrium' (i.e. their 'benchmark' turnover equates to that identified by the survey)
Survey derived performance of stores calculated by adding together 'main' and 'top up' turnover as set out in Table 3

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TABLE 5: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN HOUNSLOW

Table 5a: Estimated 'Capacity' for Convenience Goods Facilities in Hounslow

Year	Benchmark Turnover £m ¹	Hounslow Turnover £m ²	Hounslow Inflow £m	Surplus Expenditure £m
2024	92.6	104.2	1.5	13.1
2029	93.0	103.1	1.5	11.6
2034	93.0	103.4	1.5	11.9
2037	93.0	104.2	1.5	12.7
2043	93.0	106.0	1.6	14.5

Notes:

- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 20 (February 2023)
- Assumes constant market share claimed by Hounslow facilities

2021 Prices

Table 5b: Quantitative Need for Additional Convenience Goods Floorspace in Hounslow

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2024	13.1	1,000	1,300
2029	11.6	800	1,200
2034	11.9	900	1,200
2037	12.7	900	1,300
2043	14.5	1,100	1,400

Notes:

- Average sales density at 2024 assumed to be £13,657 per sq.m based on the average sales density of the leading four supermarkets - derived by GlobalData
 - Average sales density at 2024 assumed to be £10,042 per sq.m is based on the average of discount operators (Aldi & Lidl) - derived from GlobalData
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 20 (February 2023)

2021 Prices

Table 5c: Extant Convenience Goods Commitments in Hounslow

Destination	Reference	Proposal	Gross Retail Floorspace (sq.m)	Net Convenience Floorspace (sq.m)	Estimated Sales Density (£/sq.m)	Estimated Convenience Turnover (£m)	Status
Former Hounslow House, 714-746 London Road	00707/714-746/P21 (P/2016/3939)	Redevelopment to provide 293 residential units and 926sqm of flexible commercial floorspace (Use Class A1-A3/ B1/D1).	926	216	9,000	1.9	Implemented
TOTAL				216		1.9	

Notes:

- List of commitments provided by London Borough of Hounslow Council
[Former Hounslow House](#)
Gross floorspace derived from Decision Notice, Condition 40
Net convenience floorspace occupied by Amazon Fresh assessed to be 1/3 of gross floorspace with 70/30% gross/net split.
Sales density is assumption of Alder King having regard to the existing published sales density data.

2021 prices

Table 5d: Quantitative Need for Additional Convenience Goods Floorspace in Hounslow (After Commitments)

Year	Surplus £m	Commitments £m	Residual £m	Floorspace Requirement (sq m net)	
				Min ¹	Max ²
2024	13.1	1.9	11.2	800	1,100
2029	11.6	2.0	9.7	700	1,000
2034	11.9	2.0	9.9	700	1,000
2037	12.7	2.0	10.8	800	1,100
2043	14.5	2.0	12.6	900	1,200

Notes:

- Average sales density at 2024 assumed to be £13,657 per sq.m based on the average sales density of the leading four supermarkets - derived by GlobalData
 - Average sales density at 2024 assumed to be £10,042 per sq.m is based on the average of discount operators (Aldi & Lidl) - derived from GlobalData
- Residual calculated by subtracting turnover of commitments (sourced from Table 5c) from surplus expenditure (sourced from Table 5a)
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 20 (February 2023)

2021 prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

TABLE 6: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN CHISWICK

Table 6a: Estimated 'Capacity' for Convenience Goods Facilities in Chiswick

Year	Benchmark Turnover £m ¹	Chiswick Turnover £m ²	Chiswick Inflow £m	Surplus Expenditure £m
2024	95.1	105.9	3.5	14.3
2029	95.5	104.8	3.5	12.8
2034	95.5	105.1	3.5	13.1
2037	95.5	105.9	3.5	14.0
2043	95.5	107.7	3.5	15.8

Notes:

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 20 (February 2023)
2. Assumes constant market share claimed by Chiswick facilities

2021 Prices

Table 6b: Quantitative Need for Additional Convenience Goods Floorspace in Chiswick

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2024	14.3	1,100	1,400
2029	12.8	900	1,300
2034	13.1	1,000	1,300
2037	14.0	1,000	1,400
2043	15.8	1,200	1,600

Notes:

1. Average sales density at 2024 assumed to be £13,657 per sq.m based on the average sales density of the leading four supermarkets - derived by GlobalData
 2. Average sales density at 2024 assumed to be £10,042 per sq.m is based on the average of discount operators (Aldi & Lidl) - derived from GlobalData
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 20 (February 2023)

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

TABLE 7: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN BRENTFORD

Table 7a: Estimated 'Capacity' for Convenience Goods Facilities in Brentford

Year	Benchmark Turnover £m ¹	Brentford Turnover £m ²	Brentford Inflow £m	Surplus Expenditure £m
2024	93.7	103.1	3.1	12.5
2029	94.0	102.0	3.1	11.0
2034	94.0	102.3	3.1	11.3
2037	94.0	103.1	3.1	12.2
2043	94.0	104.9	3.1	14.0

Notes:

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 20 (February 2023)
2. Assumes constant market share claimed by Brentford facilities

2021 Prices

Table 6b: Quantitative Need for Additional Convenience Goods Floorspace in Brentford

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2024	12.5	900	1,200
2029	11.0	800	1,100
2034	11.3	800	1,100
2037	12.2	900	1,200
2043	14.0	1,000	1,400

Notes:

1. Average sales density at 2024 assumed to be £13,657 per sq.m based on the average sales density of the leading four supermarkets - derived by GlobalData
 2. Average sales density at 2024 assumed to be £10,042 per sq.m is based on the average of discount operators (Aldi & Lidl) - derived from GlobalData
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 20 (February 2023)

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

TABLE 8: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN FELTHAM

Table 8a: Estimated 'Capacity' for Convenience Goods Facilities in Feltham

Year	Benchmark Turnover £m ¹	Feltham Turnover £m ²	Feltham Inflow £m	Surplus Expenditure £m
2024	164.9	104.5	3.9	-56.5
2029	165.5	103.4	3.9	-58.3
2034	165.5	103.6	3.9	-58.0
2037	165.5	104.5	3.9	-57.1
2043	165.5	106.2	4.0	-55.3

Notes:

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 20 (February 2023)
2. Assumes constant market share claimed by Feltham facilities

2021 Prices

Table 8b: Quantitative Need for Additional Convenience Goods Floorspace in Feltham

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2024	-56.5	0	0
2029	-58.3	0	0
2034	-58.0	0	0
2037	-57.1	0	0
2043	-55.3	0	0

Notes:

1. Average sales density at 2024 assumed to be £13,657 per sq.m based on the average sales density of the leading four supermarkets - derived by GlobalData
 2. Average sales density at 2024 assumed to be £10,042 per sq.m is based on the average of discount operators (Aldi & Lidl) - derived from GlobalData
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 20 (February 2023)

2021 Prices

Appendix C: Comparison Goods Capacity Statistical Tables

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 1: Expenditure pattern of clothing and footwear goods, by Zone, 2024

	Zone														Total Survey Derived Turnover (£m)
	1		2		3		4		5		6		7		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	58	15.6	50	8.5	49	11.9	67	25.3	42	11.6	29	6.3	17	7.4	86.6
Hounslow Town Centre	53	14.3	15	2.5	9	2.1	63	23.7	35	9.6	23	5.1			57.3
Hounslow Town Centre Shops	53	14.3	15	2.5	9	2.1	63	23.7	35	9.6	23	5.1			57.3
Home Bargains, Hospital Road, Hounslow															
Hounslow Edge/Out of Centre															
Hospital Road Retail Area, Hospital Road, Hounslow															
Tesco Express, Bath Road, Hounslow															
Chiswick Town Centre									1	0.2	1	0.2	16	6.8	7.1
Chiswick Town Centre shops									1	0.2	1	0.2	15	6.5	6.8
Sainsbury's Superstore, Essex Place, Chiswick													1	0.3	0.3
Chiswick Edge/Out of Centre															
B&Q, Gunnersbury Avenue, Chiswick															
Brentford Town Centre															
Brentford Town Centre shops															
Morrisons, High Street, Brentford															
Brentford Edge/Out of Centre	0	0.1							2	0.6			1	0.6	1.3
Tesco Extra, Syon Lane, Osterley Park, Isleworth	0	0.1							2	0.6			1	0.6	1.3
Homebase, Syon Lane, Brentford															
971 Great West Road Retail Park, BRENTFORD (Carpetright and															
West Cross Industrial Park, West Cross Way, BRENTFORD (Currys PC World, West Cross Way, Brentford															
Other															
Feltham Town Centre	4	1.1	31	5.35	39	9.5	3	1.0			4	0.9			17.9
Feltham Town Centre shops	4	1.1	30	5.15	39	9.4	3	1.0			4	0.9			17.5
Asda, The Centre, Tilley Road, Feltham					1	0.1									0.1
Tesco Superstore, High Street, Feltham			1	0.20											0.2
Lidl, New Road, Feltham															
Feltham Edge/Out of Centre	0	0.1	4	0.63	1	0.3									1.0
Bunnings, Twickenham Road, Feltham															
Tesco Superstore, Dukes Green Avenue, Feltham	0	0.1	1	0.11	1	0.3									0.5
Apex Retail Park, Hampton Road West, FELTHAM (Wickes and			3	0.52											0.5
Adrian Hall Garden Centre, Snakey Lane, Feltham															
Other															
Other in Borough							2	0.6	4	1.2	1	0.2			2.0
Hanworth Local Centre															
Bedfont Local Centre															
Heston Local Centre															
Isleworth Town Centre															
Osterley District Centre									1	0.2					0.2
Bulls Bridge Industrial Estate, Hayes Road, Hayes															
Ivy Bridge Retail Park, Twickenham Road, ISLEWORTH (TK Maxx							1	0.2	4	1.0	1	0.2			1.4
Tesco Extra, Mogden Lane, Twickenham, Isleworth							1	0.4							0.4
Other															
Outside Survey Area	42	11.1	50	8.6	51	12.3	33	12.2	58	15.8	71	15.5	83	35.5	111.1
Kingston Upon Thames	3	0.8	3	0.56	31	7.5	15	5.6	7	1.9	2	0.4	5	2.3	19.0
Westfield (West) Shepherd's Bush	10	2.8	1	0.11			6	2.3	9	2.5	6	1.3	17	7.4	16.3
Central London	0	0.1	2	0.34	1	0.1			1	0.2	5	1.0	7	3.2	5.0
Westfield Stratford City (East) Olympic Park	0	0.1	7	1.14			3	1.0	3	0.8	1	0.2	15	6.6	9.9
Staines-upon-Thames Town Centre	4	1.1	22	3.84	7	1.7	1	0.2	1	0.2	3	0.7			7.8
Hammersmith Centre											1	0.2	22	9.5	9.7
Twickenham Centre					1	0.4			9	2.3					2.7
Ealing Centre	1	0.2			1	0.2			2	0.7	30	6.6	1	0.3	8.1
Kew Retail Park, Richmond	1	0.4					1	0.5	4	1.2	15	3.2	10	4.1	9.3
Richmond Centre	5	1.3			1	0.4	2	0.9	14	3.7	4	0.8	1	0.3	7.5
IKEA, Drury Way, Wembley															
Hayes Bridge Retail Park, Hayes	1	0.4					1	0.4							0.8
Two Rivers Retail Park, Staines-upon-Thames	0	0.1	12	2.08	2	0.4									2.6
Great Western Retail Park, Southall											2	0.4			0.4
Other	14	3.7	3	0.56	7	1.6	3	1.3	9	2.4	3	0.7	4	1.8	12.1
Total	100	26.7	100	17.1	100	24.3	100	37.5	100	27.3	100	21.8	100	42.9	197.7

Notes:

Market share figures derived from Question 7, London Borough of Hounslow Household Shoppers Survey undertaken by NEMS in May 2018
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 2: Expenditure pattern of books, CDs and DVDs, by Zone, 2024

	Zone														Total Survey Derived Turnover (£m)
	1		2		3		4		5		6		7		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	42	2.1	76	2.5	48	2.2	35	2.5	54	3.3	42	2.0	86	10.4	25.0
Hounslow Town Centre	25	1.2	2	0.1	3	0.1	23	1.7	36	2.2	8	0.4			5.7
Hounslow Town Centre Shops	25	1.2	2	0.1	3	0.1	23	1.7	36	2.2	8	0.4			5.7
Home Bargains, Hospital Road, Hounslow															
Hounslow Edge/Out of Centre															
Hospital Road Retail Area, Hospital Road, Hounslow															
Tesco Express, Bath Road, Hounslow															
Chiswick Town Centre											13	0.6	86	10.4	11.0
Chiswick Town Centre shops											13	0.6	83	10.1	10.7
Sainsbury's Superstore, Essex Place, Chiswick													3	0.3	0.3
Chiswick Edge/Out of Centre															
B&Q, Gunnersbury Avenue, Chiswick															
Brentford Town Centre											12	0.6			0.6
Brentford Town Centre shops											12	0.6			0.6
Morrisons, High Street, Brentford															
Brentford Edge/Out of Centre			2	0.1			4	0.3	6	0.4	4	0.2			0.9
Tesco Extra, Syon Lane, Osterley Park, Isleworth			2	0.1			4	0.3	6	0.4	2	0.1			0.8
Homebase, Syon Lane, Brentford															
971 Great West Road Retail Park, BRENTFORD (Carpetri															
West Cross Industrial Park, West Cross Way, BRENTFOR											2	0.1			0.1
Currys PC World, West Cross Way, Brentford															
Other															
Feltham Town Centre	14	0.7	67	2.2	42	1.9	3	0.2			2	0.1			5.1
Feltham Town Centre shops	14	0.7	65	2.1	33	1.5	3	0.2			2	0.1			4.7
Asda, The Centre, Tilley Road, Feltham															
Tesco Superstore, High Street, Feltham			2	0.1	8	0.4									0.4
Lidl, New Road, Feltham															
Feltham Edge/Out of Centre			6	0.2	3	0.1									0.3
Bunnings, Twickenham Road, Feltham															
Tesco Superstore, Dukes Green Avenue, Feltham			6	0.2	3	0.1									0.3
Apex Retail Park, Hampton Road West, FELTHAM (Wicke															
Adrian Hall Garden Centre, Snakey Lane, Feltham															
Other															
Other in Borough	3	0.1					4	0.3	12	0.7	2	0.1			1.3
Hanworth Local Centre															
Bedfont Local Centre															
Heston Local Centre															
Isleworth Town Centre											2	0.1			0.1
Osterley District Centre									10	0.6					0.6
Bulls Bridge Industrial Estate, Hayes Road, Hayes															
Ivy Bridge Retail Park, Twickenham Road, ISLEWORTH							4	0.3	2	0.1					0.1
Tesco Extra, Mogden Lane, Twickenham, Isleworth															0.3
Other															0.1
Outside Survey Area	58	2.9	24	0.8	52	2.4	65	4.6	46	2.8	58	2.7	15	1.8	18.0
Kingston Upon Thames			2	0.1	30	1.4	8	0.5	8	0.5	8	0.4			2.9
Westfield (West) Shepherd's Bush	12	0.6			1	0.1	12	0.8	4	0.2			3	0.4	2.1
Central London	3	0.1					16	1.1	4	0.3	2	0.1			1.6
Westfield Stratford City (East) Olympic Park											2	0.1			0.1
Staines-upon-Thames Town Centre	20	1.0	22	0.7	13	0.6			2	0.1	8	0.4			2.8
Hammersmith Centre											2	0.1	3	0.3	0.4
Twickenham Centre	3	0.1			3	0.1			6	0.4					0.6
Ealing Centre											26	1.2	1	0.2	1.4
Kew Retail Park, Richmond															
Richmond Centre	5	0.3							17	1.0	4	0.2	3	0.4	1.8
IKEA, Drury Way, Wembley															
Hayes Bridge Retail Park, Hayes															
Two Rivers Retail Park, Staines-upon-Thames					3	0.1									0.1
Great Western Retail Park, Southall															
Other	17	0.8			3	0.1	30	2.2	4	0.3	4	0.2	5	0.6	4.1
Total	100	5.0	100	3.3	100	4.6	100	7.1	100	6.1	100	4.7	100	12.2	43.0

Notes:

Market share figures derived from Question 8, London Borough of Hounslow Household Shoppers Survey undertaken by NEMS in May 2018
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 3: Expenditure pattern of furnishings and household textile goods, by Zone, 2024

	Zone										Total Survey Derived Turnover (£m)				
	1		2		3		4		5			6		7	
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	42	2.2	57	1.9	56	2.5	56	3.9	50	2.6	32	1.1	14	0.9	15.1
Hounslow Town Centre	26	1.3	10	0.3	10	0.4	26	1.8	31	1.7	9	0.3			5.9
Hounslow Town Centre Shops	26	1.3	10	0.3	10	0.4	26	1.8	31	1.7	9	0.3			5.9
Home Bargains, Hospital Road, Hounslow															
Hounslow Edge/Out of Centre															
Hospital Road Retail Area, Hospital Road, Hounslow															
Tesco Express, Bath Road, Hounslow															
Chiswick Town Centre											1	0.1	12	0.7	0.8
Chiswick Town Centre shops											1	0.1	11	0.7	0.7
Sainsbury's Superstore, Essex Place, Chiswick													2	0.1	0.1
Chiswick Edge/Out of Centre											3	0.1	1	0.1	0.1
B&Q, Gunnersbury Avenue, Chiswick											3	0.1	1	0.1	0.1
Brentford Town Centre	1	0.0	6	0.2			1	0.1	3	0.2	3	0.1			0.6
Brentford Town Centre shops	1	0.0	6	0.2			1	0.1	3	0.2	3	0.1			0.6
Morrisons, High Street, Brentford															
Brentford Edge/Out of Centre	13	0.7	1	0.0	9	0.4	20	1.4	15	0.8	16	0.6	1	0.1	3.9
Tesco Extra, Syon Lane, Osterley Park, Isleworth	1	0.1	1	0.0					2	0.1	10	0.4			0.6
Homebase, Syon Lane, Brentford	3	0.2			9	0.4	5	0.4	6	0.3	3	0.1			1.3
971 Great West Road Retail Park, BRENTFORD (Carpet)	8	0.4					15	1.0	2	0.1	1	0.1			1.6
West Cross Industrial Park, West Cross Way, BRENTFORD									5	0.3	1	0.1			0.3
Currys PC World, West Cross Way, Brentford															
Other													1	0.1	0.1
Feltham Town Centre	2	0.1	33	1.1	26	1.2	3	0.2							2.6
Feltham Town Centre shops	2	0.1	32	1.1	26	1.2	3	0.2							2.5
Asda, The Centre, Tilley Road, Feltham															
Tesco Superstore, High Street, Feltham															
Lidl, New Road, Feltham			1	0.0											0.0
Feltham Edge/Out of Centre			2	0.1	3	0.1									0.2
Bunnings, Twickenham Road, Feltham					2	0.1									0.1
Tesco Superstore, Dukes Green Avenue, Feltham					2	0.1									0.1
Apex Retail Park, Hampton Road West, FELTHAM (Widening)			2	0.1											0.1
Adrian Hall Garden Centre, Snakey Lane, Feltham															
Other															
Other in Borough	1	0.0	5	0.2	9	0.4	6	0.4							1.0
Hanworth Local Centre															
Bedfont Local Centre			2	0.1											0.1
Heston Local Centre															
Isleworth Town Centre			1	0.0											0.0
Osterley District Centre															
Bulls Bridge Industrial Estate, Hayes Road, Hayes															
Ivy Bridge Retail Park, Twickenham Road, ISLEWORTH					9	0.4	1	0.1							0.5
Tesco Extra, Mogden Lane, Twickenham, Isleworth							5	0.3							
Other	1	0.0	2	0.1											0.4
Outside Survey Area	58	3.0	43	1.4	44	2.0	44	3.0	50	2.7	68	2.4	86	5.2	19.8
Kingston Upon Thames	9	0.5	2	0.1	10	0.5	8	0.5	28	1.5	11	0.4	6	0.4	3.7
Westfield (West) Shepherd's Bush	6	0.3							1	0.1			23	1.4	1.8
Central London	1	0.0			1	0.0			2	0.1	3	0.1	13	0.8	1.1
Westfield Stratford City (East) Olympic Park													3	0.2	0.2
Staines-upon-Thames Town Centre	1	0.1	8	0.2	2	0.1	3	0.2							0.6
Hammersmith Centre									3	0.2			3	0.2	0.3
Twickenham Centre			5	0.2	2	0.1			4	0.2					0.5
Ealing Centre									2	0.1	16	0.6	3	0.2	0.8
Kew Retail Park, Richmond									6	0.2	4	0.3	4	0.3	0.5
Richmond Centre									3	0.2	3	0.1	2	0.1	0.4
IKEA, Drury Way, Wembley	14	0.7	2	0.1	3	0.1	3	0.2	1	0.1	3	0.1	13	0.8	2.1
Hayes Bridge Retail Park, Hayes	4	0.2	5	0.2			2	0.1			8	0.3			0.8
Two Rivers Retail Park, Staines-upon-Thames	2	0.1			3	0.2									0.3
Great Western Retail Park, Southall	5	0.2					1	0.1							0.3
Other	16	0.8	23	0.7	21	1.0	27	1.9	6	0.3	19	0.7	17	1.1	6.5
Total	100	5.3	100	3.3	100	4.5	100	6.9	100	5.3	100	3.5	100	6.1	34.9

Notes:

Market share figures derived from Question 9, London Borough of Hounslow Household Shoppers Survey undertaken by NEMS in May 2018
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 4: Expenditure pattern of small household goods such as glassware and utensils, by Zone, 2024

	Zone												Total Survey Derived Turnover (£m)		
	1		2		3		4		5		6			7	
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	71	2.6	63	1.5	54	1.8	55	3.2	44	2.0	41	1.5	18	1.5	14.1
Hounslow Town Centre	52	1.9	4	0.1	15	0.5	46	2.6	19	0.9	5	0.2			6.2
Hounslow Town Centre Shops	52	1.9	3	0.1	15	0.5	46	2.6	19	0.9	5	0.2			6.1
Home Bargains, Hospital Road, Hounslow			1	0.0											0.0
Hounslow Edge/Out of Centre	3	0.1													0.1
Hospital Road Retail Area, Hospital Road, Hounslow															
Tesco Express, Bath Road, Hounslow	3	0.1													0.1
Chiswick Town Centre													14	1.2	1.2
Chiswick Town Centre shops													14	1.2	1.2
Sainsbury's Superstore, Essex Place, Chiswick															
Chiswick Edge/Out of Centre															
B&Q, Gunnersbury Avenue, Chiswick															
Brentford Town Centre											3	0.1			0.1
Brentford Town Centre shops											3	0.1			0.1
Morrisons, High Street, Brentford															
Brentford Edge/Out of Centre	1	0.0					4	0.2	8	0.4	30	1.1	3	0.2	2.0
Tesco Extra, Syon Lane, Osterley Park, Isleworth	1	0.0					2	0.1	4	0.2	16	0.6	3	0.2	1.1
Homebase, Syon Lane, Brentford	1	0.0					3	0.1			14	0.5			0.7
971 Great West Road Retail Park, BRENTFORD (Carpa															
West Cross Industrial Park, West Cross Way, BRENTF									4	0.2					0.2
Currys PC World, West Cross Way, Brentford															
Other															
Feltham Town Centre	4	0.1	46	1.1	34	1.2					2	0.1			2.5
Feltham Town Centre shops	4	0.1	46	1.1	30	1.0					2	0.1			2.3
Asda, The Centre, Tilley Road, Feltham					4	0.1									0.1
Tesco Superstore, High Street, Feltham															
Lidl, New Road, Feltham															
Feltham Edge/Out of Centre	3	0.1	13	0.3	1	0.0			1	0.0					0.5
Bunnings, Twickenham Road, Feltham															
Tesco Superstore, Dukes Green Avenue, Feltham	3	0.1	12	0.3					1	0.0					0.4
Apex Retail Park, Hampton Road West, FELTHAM (W			1	0.0	1	0.0									0.1
Adrian Hall Garden Centre, Snakey Lane, Feltham															
Other															
Other in Borough	9	0.3			4	0.1	5	0.3	16	0.7			1	0.1	1.6
Hanworth Local Centre															
Bedfont Local Centre															
Heston Local Centre															
Isleworth Town Centre															
Osterley District Centre							1	0.1	10	0.4					0.5
Bulls Bridge Industrial Estate, Hayes Road, Hayes															
Ivy Bridge Retail Park, Twickenham Road, ISLEWORT					4	0.1	2	0.1	5	0.2					0.5
Tesco Extra, Mogden Lane, Twickenham, Isleworth							2	0.1	1	0.0					0.1
Other	9	0.3					1	0.1					1	0.1	0.5
Outside Survey Area	29	1.0	37	0.9	46	1.6	45	2.6	56	2.5	59	2.2	82	7.1	17.9
Kingston Upon Thames	5	0.2	2	0.0	13	0.4	13	0.7	22	1.0	14	0.5	12	1.0	3.9
Westfield (West) Shepherd's Bush									1	0.0	3	0.1	9	0.8	1.0
Central London	7	0.2			8	0.3			1	0.0	6	0.2	11	0.9	1.7
Westfield Stratford City (East) Olympic Park													6	0.5	0.5
Staines-upon-Thames Town Centre	1	0.0	11	0.3	2	0.1					3	0.1			0.5
Hammersmith Centre													2	0.2	0.2
Twickenham Centre	1	0.0			1	0.0	3	0.2	12	0.6					0.8
Ealing Centre											4	0.2	2	0.1	0.3
Kew Retail Park, Richmond	3	0.1			1	0.0			1	0.0	4	0.2	4	0.4	0.7
Richmond Centre									11	0.5					0.5
IKEA, Drury Way, Wembley	3	0.1	7	0.2	3	0.1	15	0.9	2	0.1	15	0.5	13	1.1	3.0
Hayes Bridge Retail Park, Hayes	3	0.1									2	0.1			0.2
Two Rivers Retail Park, Staines-upon-Thames			15	0.4	1	0.0									0.4
Great Western Retail Park, Southall							1	0.1	2	0.1					0.1
Other	7	0.2	3	0.1	17	0.6	13	0.8	5	0.2	9	0.3	24	2.1	4.2
Total	100	3.6	100	2.4	100	3.4	100	5.8	100	4.5	100	3.7	100	8.6	32.0

Notes:

Market share figures derived from Question 10, London Borough of Hounslow Household Shoppers Survey undertaken by NEMS in May 2018
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 5: Expenditure pattern of clocks, jewellery and watches, by Zone, 2024

	Zone												Total Survey Derived Turnover (£m)		
	1		2		3		4		5		6			7	
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	59	1.1	45	0.6	25	0.6	83	3.7	25	0.9	20	0.5	12	0.6	7.9
Hounslow Town Centre	59	1.1	27	0.4	13	0.3	81	3.6	21	0.7	13	0.3			6.4
Hounslow Town Centre Shops	59	1.1	27	0.4	13	0.3	81	3.6	21	0.7	13	0.3			6.4
Home Bargains, Hospital Road, Hounslow															
Hounslow Edge/Out of Centre															
Hospital Road Retail Area, Hospital Road, Hounslow															
Tesco Express, Bath Road, Hounslow															
Chiswick Town Centre											5	0.1	12	0.6	0.7
Chiswick Town Centre shops											5	0.1	12	0.6	0.7
Sainsbury's Superstore, Essex Place, Chiswick															
Chiswick Edge/Out of Centre															
B&Q, Gunnersbury Avenue, Chiswick															
Brentford Town Centre							3	0.1							0.1
Brentford Town Centre shops							3	0.1							0.1
Morrisons, High Street, Brentford															
Brentford Edge/Out of Centre									4	0.2	3	0.1			0.2
Tesco Extra, Syon Lane, Osterley Park, Isleworth											3	0.1			0.1
Homebase, Syon Lane, Brentford															
971 Great West Road Retail Park, BRENTFORD (Carp															
West Cross Industrial Park, West Cross Way, BRENT									4	0.2					0.2
Currys PC World, West Cross Way, Brentford															
Other															
Feltham Town Centre			19	0.3	12	0.3									0.5
Feltham Town Centre shops			19	0.3	12	0.3									0.5
Asda, The Centre, Tilley Road, Feltham															
Tesco Superstore, High Street, Feltham															
Lidl, New Road, Feltham															
Feltham Edge/Out of Centre					1	0.0									0.0
Bunnings, Twickenham Road, Feltham															
Tesco Superstore, Dukes Green Avenue, Feltham					1	0.0									0.0
Apex Retail Park, Hampton Road West, FELTHAM (W															
Adrian Hall Garden Centre, Snakey Lane, Feltham															
Other															
Other in Borough															
Hanworth Local Centre															
Bedfont Local Centre															
Heston Local Centre															
Isleworth Town Centre															
Osterley District Centre															
Bulls Bridge Industrial Estate, Hayes Road, Hayes															
Ivy Bridge Retail Park, Twickenham Road, ISLEWORT															
Tesco Extra, Mogden Lane, Twickenham, Isleworth															
Other															
Outside Survey Area	41	0.8	55	0.8	75	1.6	17	0.7	75	2.6	80	2.0	88	4.4	12.7
Kingston Upon Thames	1	0.0	3	0.0	26	0.6	9	0.4	20	0.7	8	0.2	4	0.2	2.1
Westfield (West) Shepherd's Bush	5	0.1							13	0.4	8	0.2	27	1.3	2.0
Central London	17	0.3			3	0.1	3	0.1	2	0.1	6	0.2	15	0.8	1.5
Westfield Stratford City (East) Olympic Park	12	0.2					3	0.1			6	0.1			0.5
Staines-upon-Thames Town Centre	1	0.0	28	0.4	15	0.3					6	0.2			0.9
Hammersmith Centre			2	0.0									14	0.7	0.7
Twickenham Centre									10	0.3					0.3
Ealing Centre									2	0.1	32	0.8	4	0.2	1.0
Kew Retail Park, Richmond									4	0.2			1	0.1	0.2
Richmond Centre									3	0.1	2	0.0	16	0.8	0.9
IKEA, Drury Way, Wembley															
Hayes Bridge Retail Park, Hayes															
Two Rivers Retail Park, Staines-upon-Thames			2	0.0	1	0.0									0.0
Great Western Retail Park, Southall															
Other	4	0.1	21	0.3	29	0.6	3	0.1	21	0.7	12	0.3	8	0.4	2.5
Total	100	1.9	100	1.4	100	2.2	100	4.4	100	3.4	100	2.4	100	4.9	20.7

Notes:

Market share figures derived from Question 11, London Borough of Hounslow Household Shoppers Survey undertaken by NEMS in May 2018
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 6: Expenditure pattern of toys, games, bicycles and other recreational / sports goods, by Zone, 2024

	Zone														Total Survey Derived Turnover (£m)
	1		2		3		4		5		6		7		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	69	6.1	59	4.0	75	7.4	48	6.7	66	7.1	33	2.7	57	9.3	43.3
Hounslow Town Centre	64	5.7	14	0.9	8	0.8	46	6.4	40	4.3	25	2.0			20.2
Hounslow Town Centre Shops	64	5.7	14	0.9	8	0.8	46	6.4	40	4.3	25	2.0			20.2
Home Bargains, Hospital Road, Hounslow															
Hounslow Edge/Out of Centre					4	0.4									0.4
Hospital Road Retail Area, Hospital Road, Hounslow					4	0.4									0.4
Tesco Express, Bath Road, Hounslow															
Chiswick Town Centre													56	9.0	9.0
Chiswick Town Centre shops													56	9.0	9.0
Sainsbury's Superstore, Essex Place, Chiswick															
Chiswick Edge/Out of Centre															
B&Q, Gunnersbury Avenue, Chiswick															
Brentford Town Centre			1	0.1							3	0.2			0.3
Brentford Town Centre shops			1	0.1							3	0.2			0.3
Morrisons, High Street, Brentford															
Brentford Edge/Out of Centre	2	0.2						4	0.5		3	0.2			0.9
Tesco Extra, Syon Lane, Osterley Park, Isleworth	1	0.1						4	0.5		3	0.2			0.8
Homebase, Syon Lane, Brentford	1	0.1													0.1
971 Great West Road Retail Park, BRENTFORD (Carpet)															
West Cross Industrial Park, West Cross Way, BRENTFC															
Currys PC World, West Cross Way, Brentford															
Other															
Feltham Town Centre			40	2.7	59	5.9			1	0.2					8.7
Feltham Town Centre shops			40	2.7	59	5.9			1	0.2					8.7
Asda, The Centre, Tilley Road, Feltham															
Tesco Superstore, High Street, Feltham															
Lidl, New Road, Feltham															
Feltham Edge/Out of Centre	1	0.1	2	0.1	1	0.1									0.4
Bunnings, Twickenham Road, Feltham															
Tesco Superstore, Dukes Green Avenue, Feltham	1	0.1													0.1
Apex Retail Park, Hampton Road West, FELTHAM (Wid			2	0.1	1	0.1									0.3
Adrian Hall Garden Centre, Snakey Lane, Feltham															
Other															
Other in Borough	2	0.2	2	0.2	2	0.2	2	0.3	20	2.2	2	0.1	1	0.2	3.4
Hanworth Local Centre															
Bedfont Local Centre															
Heston Local Centre															
Isleworth Town Centre					1	0.1			7	0.8					0.8
Osterley District Centre									1	0.2					0.2
Bulls Bridge Industrial Estate, Hayes Road, Hayes	2	0.1	1	0.1	1	0.1			6	0.7			1	0.2	1.2
Ivy Bridge Retail Park, Twickenham Road, ISLEWORTH			1	0.1	1	0.1			5	0.6					0.9
Tesco Extra, Mogden Lane, Twickenham, Isleworth							2	0.3							0.3
Other	1	0.1													0.1
Outside Survey Area	31	2.8	41	2.8	25	2.5	52	7.3	34	3.7	67	5.3	43	6.9	31.2
Kingston Upon Thames	3	0.2	5	0.3	1	0.1	3	0.4	5	0.6	3	0.3			1.9
Westfield (West) Shepherd's Bush					1	0.1	2	0.3	9	1.0	7	0.5	8	1.3	3.1
Central London	10	0.9	1	0.1	4	0.4	1	0.2	1	0.2			10	1.6	3.2
Westfield Stratford City (East) Olympic Park													15	2.4	2.4
Staines-upon-Thames Town Centre	2	0.1	13	0.9	4	0.4					3	0.3			1.7
Hammersmith Centre													1	0.2	0.2
Twickenham Centre							23	3.2	7	0.7					3.9
Ealing Centre											32	2.6			2.6
Kew Retail Park, Richmond											5	0.4	4	0.7	1.1
Richmond Centre									1	0.2			1	0.2	0.4
IKEA, Drury Way, Wembley															
Hayes Bridge Retail Park, Hayes	10	0.9	1	0.1			5	0.7			10	0.8			2.5
Two Rivers Retail Park, Staines-upon-Thames			14	0.9	10	1.0									1.9
Great Western Retail Park, Southall	4	0.4									2	0.1			0.5
Other	3	0.3	7	0.5	6	0.6	18	2.5	10	1.1	5	0.4	3	0.5	5.9
Total	100	8.9	100	6.8	100	9.9	100	14.0	100	10.8	100	8.0	100	16.2	74.5

Notes:

Market share figures derived from Question 12, London Borough of Hounslow Household Shoppers Survey undertaken by NEMS in May 2018
Excludes responses Special Forms of Trading, 'Don't do this, 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 7: Expenditure pattern of chemist goods (including health and beauty products), by Zone, 2024

	Zone														Total Survey Derived Turnover (£m)
	1		2		3		4		5		6		7		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	79	11.1	84	6.8	81	8.8	79	15.6	59	7.5	64	6.9	76	18.5	75.3
Hounslow Town Centre	71	10.0	2	0.2	12	1.3	65	13.0	23	2.9	3	0.4			27.8
Hounslow Town Centre Shops	71	10.0	2	0.2	12	1.3	65	13.0	23	2.9	3	0.4			27.8
Home Bargains, Hospital Road, Hounslow															
Hounslow Edge/Out of Centre															
Hospital Road Retail Area, Hospital Road, Hounslow															
Tesco Express, Bath Road, Hounslow															
Chiswick Town Centre	1	0.1					1	0.1	10	1.3	5	0.6	76	18.5	20.6
Chiswick Town Centre shops	1	0.1					1	0.1	10	1.3	5	0.6	74.6	18.1	20.2
Sainsbury's Superstore, Essex Place, Chiswick													1.7	0.4	0.4
Chiswick Edge/Out of Centre															
B&Q, Gunnersbury Avenue, Chiswick															
Brentford Town Centre			3	0.2					1	0.1	49	5.3			5.6
Brentford Town Centre shops			3	0.2					1	0.1	44	4.8			5.0
Morrisons, High Street, Brentford											5	0.5			0.5
Brentford Edge/Out of Centre	1	0.1					1	0.2	5	0.6	6	0.7			1.6
Tesco Extra, Syon Lane, Osterley Park, Isleworth	1	0.1					1	0.2	4	0.6	6	0.7			1.6
Homebase, Syon Lane, Brentford															
971 Great West Road Retail Park, BRENTFORD (Carpa															
West Cross Industrial Park, West Cross Way, BRENTF									1	0.1					0.1
Currys PC World, West Cross Way, Brentford															
Other															
Feltham Town Centre	3	0.4	67	5.4	54	5.9	5	1.0	1	0.2					12.9
Feltham Town Centre shops	3	0.4	66	5.3	51	5.5	5	1.0	1	0.2					12.5
Asda, The Centre, Tilley Road, Feltham					0	0.1									0.1
Tesco Superstore, High Street, Feltham			1	0.1	3	0.3									0.4
Lidl, New Road, Feltham															
Feltham Edge/Out of Centre	1	0.2	2	0.2	2	0.2									0.6
Bunnings, Twickenham Road, Feltham															
Tesco Superstore, Dukes Green Avenue, Feltham	1	0.2	2	0.2	0	0.1									0.4
Apex Retail Park, Hampton Road West, FELTHAM (W					0	0.1									0.1
Adrian Hall Garden Centre, Snakey Lane, Feltham															
Other					1	0.1									0.1
Other in Borough	2	0.3	9	0.7	13	1.4	7	1.3	19	2.5					6.2
Hanworth Local Centre	0	0.1			13	1.4									1.5
Bedfont Local Centre			9	0.7											0.7
Heston Local Centre	1	0.2					4	0.8							0.9
Isleworth Town Centre									17	2.2					2.2
Osterley District Centre							1	0.1	1	0.1					0.2
Bulls Bridge Industrial Estate, Hayes Road, Hayes															
Ivy Bridge Retail Park, Twickenham Road, ISLEWORT							1	0.1	1	0.1					0.2
Tesco Extra, Mogden Lane, Twickenham, Isleworth							1	0.3							0.3
Other	1	0.1					1	0.1							0.2
Outside Survey Area	21	3.0	16	1.3	19	2.1	22	4.3	41	5.2	36	3.9	24	5.7	25.5
Kingston Upon Thames	0	0.1	1	0.0	13	1.4	6	1.1	1	0.1					2.6
Westfield (West) Shepherd's Bush	4	0.5							1	0.1	1	0.1	0.6	0.2	0.9
Central London	6	0.8					1	0.1							0.9
Westfield Stratford City (East) Olympic Park													8.0	1.9	1.9
Staines-upon-Thames Town Centre	2	0.3	4	0.3	1	0.1	1	0.2			1	0.1			0.9
Hammersmith Centre			6	0.5	0	0.1	5	1.0			1	0.1	6.3	1.5	3.2
Twickenham Centre	0	0.1			0	0.1	2	0.3	24	3.0					3.5
Ealing Centre	1	0.1							1	0.1	14	1.5			1.7
Kew Retail Park, Richmond							2	0.5	3	0.4	10	1.1	5.4	1.3	3.3
Richmond Centre							1	0.1	9	1.1					1.2
IKEA, Drury Way, Wembley															
Hayes Bridge Retail Park, Hayes	1	0.1													0.1
Two Rivers Retail Park, Staines-upon-Thames					0	0.1									0.1
Great Western Retail Park, Southall	2	0.2													0.2
Other	6	0.8	6	0.5	5	0.5	5	1.0	2	0.3	10	1.0	3	0.8	5.0
Total	100	14.1	100	8.1	100	11.0	100	19.9	100	12.7	100	10.8	100	24.3	100.8

Notes:

Market share figures derived from Question 13, London Borough of Hounslow Household Shoppers Survey undertaken by NEMS in May 2018
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 8: Expenditure pattern of large household electrical items (white goods), by Zone, 2024

	Zone														Total Survey Derived Turnover (£m)
	1		2		3		4		5		6		7		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	78	2.6	63	1.3	72	2.1	66	2.9	72	2.8	65	1.8	31	2.2	15.7
Hounslow Town Centre	35	1.2	1	0.0			16	0.7	23	0.9	2	0.1			2.8
Hounslow Town Centre Shops	35	1.2	1	0.0			16	0.7	23	0.9	2	0.1			2.8
Home Bargains, Hospital Road, Hounslow															
Hounslow Edge/Out of Centre															
Hospital Road Retail Area, Hospital Road, Hounslow															
Tesco Express, Bath Road, Hounslow															
Chiswick Town Centre									1	0.0	2	0.1	3	0.2	0.3
Chiswick Town Centre shops									1	0.0	2	0.1	3	0.2	0.3
Sainsbury's Superstore, Essex Place, Chiswick															
Chiswick Edge/Out of Centre													2	0.1	0.1
B&Q, Gunnersbury Avenue, Chiswick													2	0.1	0.1
Brentford Town Centre	1	0.0	1	0.0			10	0.4	2	0.1	9	0.2			0.8
Brentford Town Centre shops	1	0.0	1	0.0			10	0.4	2	0.1	9	0.2			0.8
Morrisons, High Street, Brentford															
Brentford Edge/Out of Centre	22	0.7	1	0.0	9	0.3	24	1.0	32	1.3	50	1.4	22	1.6	6.3
Tesco Extra, Syon Lane, Osterley Park, Isleworth	1	0.0					1	0.0	4	0.1	6	0.2	1	0.1	0.5
Homebase, Syon Lane, Brentford									4	0.1			2	0.1	0.3
971 Great West Road Retail Park, BRENTFORD (Carpe	10	0.3			1	0.0	17	0.7	3	0.1	10	0.3	4	0.3	1.8
West Cross Industrial Park, West Cross Way, BRENTF	4	0.1			1	0.0	6	0.2	21	0.8	34	1.0	10	0.7	2.9
Currys PC World, West Cross Way, Brentford	7	0.2	1	0.0	7	0.2			1	0.0			4	0.3	0.8
Other	1	0.0													0.0
Feltham Town Centre	2	0.1	20	0.4	17	0.5	1	0.0							1.0
Feltham Town Centre shops	2	0.1	20	0.4	17	0.5	1	0.0							1.0
Asda, The Centre, Tilley Road, Feltham															
Tesco Superstore, High Street, Feltham															
Lidl, New Road, Feltham															
Feltham Edge/Out of Centre	8	0.3	39	0.8	44	1.3	3	0.1							2.5
Bunnings, Twickenham Road, Feltham															
Tesco Superstore, Dukes Green Avenue, Feltham	4	0.1													0.1
Apex Retail Park, Hampton Road West, FELTHAM (Wi	4	0.1	39	0.8	43	1.3	3	0.1							2.3
Adrian Hall Garden Centre, Snakey Lane, Feltham															
Other					1	0.0									0.0
Other in Borough	10	0.3	2	0.0	2	0.1	13	0.6	14	0.6	2	0.1	3	0.2	1.8
Hanworth Local Centre			1	0.0											0.0
Bedfont Local Centre															
Heston Local Centre	1	0.0													0.0
Isleworth Town Centre							2	0.1							0.1
Osterley District Centre															
Bulls Bridge Industrial Estate, Hayes Road, Hayes															
Ivy Bridge Retail Park, Twickenham Road, ISLEWORT	9	0.3	1	0.0	1	0.0	10	0.4	14	0.6	2	0.1	3	0.2	1.6
Tesco Extra, Mogden Lane, Twickenham, Isleworth					1	0.0	2	0.1							0.1
Other															
Outside Survey Area	22	0.7	37	0.8	28	0.8	34	1.5	28	1.1	35	1.0	69	4.9	10.8
Kingston Upon Thames	4	0.1	1	0.0	12	0.3	21	0.9	11	0.4	8	0.2	19	1.3	3.4
Westfield (West) Shepherd's Bush													1	0.1	0.1
Central London	8	0.3	4	0.1	1	0.0			1	0.0	7	0.2	17	1.2	1.8
Westfield Stratford City (East) Olympic Park													2	0.2	0.2
Staines-upon-Thames Town Centre			2	0.0	1	0.0	4	0.2							0.3
Hammersmith Centre			6	0.1	4	0.1					1	0.0			0.3
Twickenham Centre							1	0.0	14	0.6	1	0.0			0.6
Ealing Centre											2	0.1	1	0.1	0.1
Kew Retail Park, Richmond															
Richmond Centre													1	0.1	0.1
IKEA, Drury Way, Wembley															
Hayes Bridge Retail Park, Hayes	7	0.2	1	0.0	3	0.1	5	0.2					1	0.1	0.6
Two Rivers Retail Park, Staines-upon-Thames			3	0.1	2	0.1									0.1
Great Western Retail Park, Southall	2	0.1	1	0.0							8	0.2	6	0.5	0.8
Other	1	0.0	19	0.4	4	0.1	3	0.1	2	0.1	10	0.3	20	1.4	2.4
Total	100	3.3	100	2.1	100	2.9	100	4.3	100	4.0	100	2.8	100	7.1	26.6

Notes:

Market share figures derived from Question 14, London Borough of Hounslow Household Shoppers Survey undertaken by NEMS in May 2018
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 9: Expenditure pattern of small electrical goods (cameras, tablets, hairdryers, blenders), by Zone, 2024

	Zone														Total Survey Derived Turnover (£m)
	1		2		3		4		5		6		7		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	67	5.0	73	3.6	56	3.8	75	8.0	64	5.6	59	3.7	63	7.7	37.5
Hounslow Town Centre	41	3.1	1	0.0			33	3.5	31	2.8	6	0.3	2	0.2	9.9
Hounslow Town Centre Shops	41	3.1	1	0.0			33	3.5	31	2.8	6	0.3	2	0.2	9.9
Home Bargains, Hospital Road, Hounslow															
Hounslow Edge/Out of Centre															
Hospital Road Retail Area, Hospital Road, Hounslow															
Tesco Express, Bath Road, Hounslow															
Chiswick Town Centre									1	0.1	1	0.1	48	5.9	6.1
Chiswick Town Centre shops									1	0.1	1	0.1	48	5.9	6.1
Sainsbury's Superstore, Essex Place, Chiswick															
Chiswick Edge/Out of Centre							1	0.1					2	0.2	0.3
B&Q, Gunnersbury Avenue, Chiswick							1	0.1					2	0.2	0.3
Brentford Town Centre	2	0.1	2	0.1			15	1.6	2	0.2	8	0.5			2.5
Brentford Town Centre shops	2	0.1	2	0.1			15	1.6	2	0.2	8	0.5			2.5
Morrisons, High Street, Brentford															
Brentford Edge/Out of Centre	14	1.1	8	0.4	9	0.6	20	2.2	16	1.4	43	2.7	11	1.4	9.7
Tesco Extra, Syon Lane, Osterley Park, Isleworth			3	0.1	1	0.1	2	0.2	10	0.9	14	0.8			2.2
Homebase, Syon Lane, Brentford															
971 Great West Road Retail Park, BRENTFORD (Carpet)	2	0.2					11	1.2	2	0.2	6	0.4	4	0.5	2.4
West Cross Industrial Park, West Cross Way, BRENTFORD	3	0.2	5	0.3			7	0.8	3	0.2	21	1.3	7	0.8	3.6
Currys PC World, West Cross Way, Brentford	9	0.6			7	0.5			1	0.1			1	0.1	1.3
Other	1	0.1									2	0.1			0.2
Feltham Town Centre	1	0.1	32	1.6	40	2.7									4.4
Feltham Town Centre shops	1	0.1	32	1.6	40	2.7									4.4
Asda, The Centre, Tilley Road, Feltham															
Tesco Superstore, High Street, Feltham															
Lidl, New Road, Feltham															
Feltham Edge/Out of Centre	3	0.3	30	1.5	7	0.5	1	0.1							2.3
Bunnings, Twickenham Road, Feltham															
Tesco Superstore, Dukes Green Avenue, Feltham	2	0.1	5	0.3											0.4
Apex Retail Park, Hampton Road West, FELTHAM (Widening)	2	0.1	25	1.2	7	0.5	1	0.1							1.9
Adrian Hall Garden Centre, Snakey Lane, Feltham															
Other															
Other in Borough	6	0.4			1	0.0	5	0.6	14	1.2	1	0.1			2.3
Hanworth Local Centre															
Bedfont Local Centre															
Heston Local Centre															
Isleworth Town Centre									1	0.1					0.1
Osterley District Centre									1	0.1					0.1
Bulls Bridge Industrial Estate, Hayes Road, Hayes															
Ivy Bridge Retail Park, Twickenham Road, ISLEWORTH	5	0.4			1	0.0	3	0.3	13	1.1	1	0.1			1.9
Tesco Extra, Mogden Lane, Twickenham, Isleworth									2	0.2					0.2
Other	1	0.1													0.1
Outside Survey Area	33	2.4	27	1.3	44	3.0	25	2.6	36	3.1	41	2.5	37	4.6	19.6
Kingston Upon Thames	2	0.2	5	0.3	29	2.0	14	1.4	8	0.7	9	0.6	5	0.6	5.7
Westfield (West) Shepherd's Bush											1	0.1	5	0.6	0.6
Central London	9	0.6	4	0.2					1	0.1	2	0.1	10	1.2	2.3
Westfield Stratford City (East) Olympic Park	9	0.7					4	0.4					9	1.2	2.3
Staines-upon-Thames Town Centre	1	0.1	6	0.3	1	0.0									0.4
Hammersmith Centre					5	0.3			1	0.1					0.4
Twickenham Centre	1	0.1	1	0.0			3	0.3	19	1.6					2.0
Ealing Centre											10	0.6	1	0.1	0.7
Kew Retail Park, Richmond															
Richmond Centre									1	0.1	1	0.1	4	0.5	0.6
IKEA, Drury Way, Wembley															
Hayes Bridge Retail Park, Hayes	7	0.5					2	0.2							0.7
Two Rivers Retail Park, Staines-upon-Thames			2	0.1											0.1
Great Western Retail Park, Southall											12	0.7	2	0.2	1.0
Other	3	0.3	8	0.4	10	0.7	3	0.3	7	0.6	5	0.3	2	0.2	2.7
Total	100	7.4	100	4.9	100	6.9	100	10.7	100	8.8	100	6.2	100	12.3	57.1

Notes:

Market share figures derived from Question 15, London Borough of Hounslow Household Shoppers Survey undertaken by NEMS in May 2018
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 10: Expenditure pattern of furniture, carpets and floor coverings, by Zone, 2024

	Zone														Total Survey Derived Turnover (£m)
	1		2		3		4		5		6		7		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	59	5.3	60	3.1	49	3.4	44	5.0	41	3.9	58	3.5	34	4.2	28.4
Hounslow Town Centre	38	3.4	7	0.3	6	0.4	9	1.0	18	1.7	6	0.4			7.3
Hounslow Town Centre Shops	38	3.4	7	0.3	6	0.4	9	1.0	18	1.7	6	0.4			7.3
Home Bargains, Hospital Road, Hounslow															
Hounslow Edge/Out of Centre															
Hospital Road Retail Area, Hospital Road, Hounslow															
Tesco Express, Bath Road, Hounslow															
Chiswick Town Centre											1	0.1	31	3.7	3.8
Chiswick Town Centre shops											1	0.1	31	3.7	3.8
Sainsbury's Superstore, Essex Place, Chiswick															
Chiswick Edge/Out of Centre	7	0.6					1	0.1			5	0.3			1.1
B&Q, Gunnersbury Avenue, Chiswick	7	0.6					1	0.1			5	0.3			1.1
Brentford Town Centre	1	0.1	3	0.2			11	1.3	5	0.5	5	0.3			2.3
Brentford Town Centre shops	1	0.1	3	0.2			11	1.3	5	0.5	5	0.3			2.3
Morrisons, High Street, Brentford															
Brentford Edge/Out of Centre	5	0.4	2	0.1	17	1.2	19	2.2	17	1.6	39	2.3	4	0.5	8.3
Tesco Extra, Syon Lane, Osterley Park, Isleworth									3	0.2					0.2
Homebase, Syon Lane, Brentford					9	0.7	2	0.2			3	0.2			1.1
971 Great West Road Retail Park, BRENTFORD (Carpet)	3	0.3	2	0.1	7	0.5	16	1.8	6	0.5	27	1.6	2	0.3	5.2
West Cross Industrial Park, West Cross Way, BRENTFORD									1	0.1					0.1
Currys PC World, West Cross Way, Brentford															
Other	1	0.1					2	0.2	7	0.7	9	0.5	1	0.2	1.7
Feltham Town Centre	4	0.4	39	2.0	11	0.8	1	0.1							3.3
Feltham Town Centre shops	4	0.4	39	2.0	11	0.8	1	0.1							3.3
Asda, The Centre, Tilley Road, Feltham															
Tesco Superstore, High Street, Feltham															
Lidl, New Road, Feltham															
Feltham Edge/Out of Centre	3	0.3	7	0.4	16	1.1	3	0.3							2.0
Bunnings, Twickenham Road, Feltham							3	0.3							0.3
Tesco Superstore, Dukes Green Avenue, Feltham															
Apex Retail Park, Hampton Road West, FELTHAM (Widening)	2	0.2	6	0.3	9	0.7									1.2
Adrian Hall Garden Centre, Snakey Lane, Feltham															
Other	1	0.1	1	0.1	6	0.4									0.6
Other in Borough	1	0.1	1	0.1					1	0.1	1	0.1			0.3
Hanworth Local Centre															
Bedfont Local Centre			1	0.1											0.1
Heston Local Centre															
Isleworth Town Centre											1	0.1			0.1
Osterley District Centre															
Bulls Bridge Industrial Estate, Hayes Road, Hayes															
Ivy Bridge Retail Park, Twickenham Road, ISLEWORTH	1	0.1													0.1
Tesco Extra, Mogden Lane, Twickenham, Isleworth									1	0.1					0.2
Other	1	0.1													
Outside Survey Area	41	3.6	40	2.1	51	3.5	56	6.5	60	5.8	42	2.6	66	8.0	32.0
Kingston Upon Thames			6	0.3	3	0.2	14	1.6	12	1.2	10	0.6	5	0.6	4.5
Westfield (West) Shepherd's Bush															
Central London					12	0.8			7	0.7	2	0.1	12	1.4	3.0
Westfield Stratford City (East) Olympic Park									6	0.6			2	0.3	0.9
Staines-upon-Thames Town Centre	1	0.1	12	0.6	6	0.4					2	0.1	4	0.5	1.1
Hammersmith Centre			2	0.1	1	0.1	5	0.5							1.3
Twickenham Centre							1	0.1	1	0.1					0.2
Ealing Centre	1	0.1							1	0.1	8	0.5			0.7
Kew Retail Park, Richmond									6	0.6					0.6
Richmond Centre			5	0.3					2	0.2					0.5
IKEA, Drury Way, Wembley	18	1.6	1	0.1	2	0.1	3	0.3	15	1.5	7	0.4	27	3.4	7.3
Hayes Bridge Retail Park, Hayes	2	0.2	1	0.1	2	0.1	10	1.1			4	0.2	2	0.3	2.1
Two Rivers Retail Park, Staines-upon-Thames	1	0.1	1	0.1	1	0.1			1	0.1			1	0.2	0.5
Great Western Retail Park, Southall	6	0.5					18	2.0	3	0.2	7	0.4			3.3
Other	13	1.1	12	0.6	24	1.7	6	0.7	6	0.5	2	0.1	11	1.3	6.2
Total	100	8.8	100	5.2	100	6.9	100	11.5	101	9.7	100	6.1	100	12.2	60.5

Notes:

Market share figures derived from Question 16, London Borough of Hounslow Household Shoppers Survey undertaken by NEMS in May 2018
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 11: Expenditure pattern of DIY (including gardening) goods, by Zone, 2024

	Zone														Total Survey Derived Turnover (£m)
	1		2		3		4		5		6		7		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	69	3.1	87	2.8	84	3.9	90	5.6	89	5.0	87	3.5	86	8.9	32.7
Hounslow Town Centre	23	1.0	5	0.2	1	0.1	14	0.9	18	1.0	1	0.0			3.2
Hounslow Town Centre Shops	23	1.0	5	0.2	1	0.1	13	0.8	18	1.0	1	0.0			3.1
Home Bargains, Hospital Road, Hounslow							1	0.0							0.0
Hounslow Edge/Out of Centre															
Hospital Road Retail Area, Hospital Road, Hounslow															
Tesco Express, Bath Road, Hounslow															
Chiswick Town Centre							1	0.0	6	0.4			17	1.7	2.1
Chiswick Town Centre shops							1	0.0	6	0.4			17	1.7	2.1
Sainsbury's Superstore, Essex Place, Chiswick															
Chiswick Edge/Out of Centre	14	0.6	2	0.1			13	0.8	10	0.6	23	0.9	59	6.2	9.1
B&Q, Gunnersbury Avenue, Chiswick	14	0.6	2	0.1			13	0.8	10	0.6	23	0.9	59	6.2	9.1
Brentford Town Centre	1	0.0					18	1.1	2	0.1	13	0.5			1.8
Brentford Town Centre shops	1	0.0					18	1.1	2	0.1	13	0.5			1.8
Morrisons, High Street, Brentford															
Brentford Edge/Out of Centre	16	0.7			13	0.6	32	2.0	46	2.6	48	1.9	7	0.7	8.6
Tesco Extra, Syon Lane, Osterley Park, Isleworth							1	0.0							0.0
Homebase, Syon Lane, Brentford	11	0.5			13	0.6	23	1.4	46	2.6	39	1.6	7	0.7	7.4
971 Great West Road Retail Park, BRENTFORD (Carpet)	5	0.2					8	0.5	1	0.0	3	0.1			0.9
West Cross Industrial Park, West Cross Way, BRENTFO															
Currys PC World, West Cross Way, Brentford											6	0.2			0.2
Other															
Feltham Town Centre			10	0.3	13	0.6			1	0.0					0.9
Feltham Town Centre shops			10	0.3	9	0.4			1	0.0					0.7
Asda, The Centre, Tilley Road, Feltham															
Tesco Superstore, High Street, Feltham					1	0.1									0.1
Lidl, New Road, Feltham					3	0.1									0.1
Feltham Edge/Out of Centre	3	0.1	69	2.2	48	2.2	6	0.4	1	0.0					4.9
Bunnings, Twickenham Road, Feltham	3	0.1	59	1.9	38	1.7	6	0.4	1	0.0					4.1
Tesco Superstore, Dukes Green Avenue, Feltham															
Apex Retail Park, Hampton Road West, FELTHAM (Wick	1	0.0	9	0.3	5	0.3									0.6
Adrian Hall Garden Centre, Snakey Lane, Feltham			1	0.0	4	0.2									0.2
Other					1	0.0									0.0
Other in Borough	12	0.5	2	0.1	9	0.4	7	0.4	5	0.3	2	0.1	2	0.3	2.0
Hanworth Local Centre			1	0.0	7	0.3									0.4
Bedfont Local Centre															
Heston Local Centre															
Isleworth Town Centre	5	0.2							1	0.1	2	0.1	1	0.1	0.5
Osterley District Centre	1	0.0													0.0
Bulls Bridge Industrial Estate, Hayes Road, Hayes															
Ivy Bridge Retail Park, Twickenham Road, ISLEWORTH	1	0.0							2	0.1			1	0.1	0.2
Tesco Extra, Mogden Lane, Twickenham, Isleworth							1	0.1							0.1
Other	6	0.3	1	0.0	2	0.1	6	0.4	1	0.1					0.8
Outside Survey Area	31	1.4	13	0.4	16	0.7	10	0.6	11	0.6	13	0.5	14	1.5	5.8
Kingston Upon Thames	1	0.0									1	0.0			0.1
Westfield (West) Shepherd's Bush															
Central London					4	0.2	1	0.0							0.2
Westfield Stratford City (East) Olympic Park															
Staines-upon-Thames Town Centre	5	0.2	1	0.0									6	0.7	0.3
Hammersmith Centre			2	0.1	2	0.1			1	0.1					0.9
Twickenham Centre					2	0.1	1	0.0	2	0.1	2	0.1			0.3
Ealing Centre											3	0.1	1	0.1	0.2
Kew Retail Park, Richmond													1	0.1	0.1
Richmond Centre									5	0.3	1	0.0	1	0.1	0.4
IKEA, Drury Way, Wembley															
Hayes Bridge Retail Park, Hayes	2	0.1					3	0.2							0.3
Two Rivers Retail Park, Staines-upon-Thames															
Great Western Retail Park, Southall	12	0.5					1	0.1	2	0.1	1	0.0			0.8
Other	11	0.5	10	0.3	8	0.4	4	0.2	1	0.1	6	0.2	6	0.6	2.3
Total	100	4.4	100	3.2	100	4.6	100	6.2	100	5.7	100	4.0	100	10.4	38.5

Notes:
Market share figures derived from Question 17, London Borough of Hounslow Household Shoppers Survey undertaken by NEMS in May 2018
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 12: Comparison Goods Expenditure Pattern - Bulky Goods, by Zone, 2024

	Zone														Total Survey Derived Turnover (£m)
	1		2		3		4		5		6		7		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	66	10.9	69	7.2	65	9.4	61	13.5	61	11.8	68	8.8	51	15.3	76.9
Hounslow Town Centre	34	5.6	5	0.5	3	0.5	12	2.5	19	3.7	4	0.5			13.3
Hounslow Town Centre Shops	34	5.6	5	0.5	3	0.5	11	2.5	19	3.7	4	0.5			13.2
Home Bargains, Hospital Road, Hounslow							0	0.0							0.0
Hounslow Edge/Out of Centre															
Hospital Road Retail Area, Hospital Road, Hounslow															
Tesco Express, Bath Road, Hounslow															
Chiswick Town Centre							0	0.0	2	0.4	1	0.1	19	5.7	6.3
Chiswick Town Centre shops							0	0.0	2	0.4	1	0.1	19	5.7	6.3
Sainsbury's Superstore, Essex Place, Chiswick															
Chiswick Edge/Out of Centre	8	1.3	0	0.1			4	0.9	3	0.6	10	1.2	21	6.3	10.3
B&Q, Gunnersbury Avenue, Chiswick	8	1.3	0	0.1			4	0.9	3	0.6	10	1.2	21	6.3	10.3
Brentford Town Centre	1	0.1	2	0.2			13	2.8	3	0.7	8	1.1			4.9
Brentford Town Centre shops	1	0.1	2	0.2			13	2.8	3	0.7	8	1.1			4.9
Morrisons, High Street, Brentford															
Brentford Edge/Out of Centre	11	1.9	1	0.1	14	2.0	24	5.2	28	5.5	44	5.7	9	2.8	23.2
Tesco Extra, Syon Lane, Osterley Park, Isleworth	0	0.0					0	0.1	2	0.4	1	0.2	0	0.1	0.7
Homebase, Syon Lane, Brentford	3	0.5			9	1.3	7	1.6	14	2.7	14	1.8	3	0.9	8.8
971 Great West Road Retail Park, BRENTFORD (Carpetright)	5	0.8	1	0.1	4	0.5	14	3.1	4	0.7	16	2.0	2	0.6	7.9
West Cross Industrial Park, West Cross Way, BRENTFORD	1	0.1			0	0.0	1	0.2	5	1.0	7	1.0	2	0.7	3.1
Currys PC World, West Cross Way, Brentford	1	0.2	0	0.0	1	0.2			0	0.0			1	0.3	0.8
Other	1	0.2					1	0.2	4	0.7	6	0.8	1	0.2	2.0
Feltham Town Centre	3	0.4	26	2.8	13	1.9	1	0.2	0	0.0					5.2
Feltham Town Centre shops	3	0.4	26	2.8	12	1.7	1	0.2	0	0.0					5.0
Asda, The Centre, Tilley Road, Feltham															0.1
Tesco Superstore, High Street, Feltham					0	0.1									0.1
Lidl, New Road, Feltham					1	0.1									0.1
Feltham Edge/Out of Centre	4	0.7	32	3.4	32	4.6	4	0.8	0	0.0					9.5
Bunnings, Twickenham Road, Feltham	1	0.1	18	1.9	12	1.7	3	0.7	0	0.0					4.5
Tesco Superstore, Dukes Green Avenue, Feltham	1	0.1													0.1
Apex Retail Park, Hampton Road West, FELTHAM (Wickes)	2	0.3	14	1.4	15	2.2	0	0.1							4.1
Adrian Hall Garden Centre, Snakey Lane, Feltham			0	0.0	1	0.2									0.2
Other	0	0.1	1	0.1	3	0.5									0.6
Other in Borough	6	1.0	1	0.1	3	0.5	5	1.0	5	0.9	1	0.2	2	0.5	4.2
Hanworth Local Centre			0	0.0	2	0.3									0.4
Bedfont Local Centre			1	0.1											0.1
Heston Local Centre	0	0.0													0.0
Isleworth Town Centre	1	0.2					0	0.1	0	0.1	1	0.1	0	0.1	0.7
Osterley District Centre	0	0.0													0.0
Bulls Bridge Industrial Estate, Hayes Road, Hayes															
Ivy Bridge Retail Park, Twickenham Road, ISLEWORTH (Matala)	2	0.4	0	0.0	0	0.0	2	0.4	3	0.7	0	0.1	1	0.3	1.9
Tesco Extra, Mogden Lane, Twickenham, Isleworth					0	0.0	1	0.1							0.2
Other	2	0.3	0	0.0	1	0.1	2	0.4	1	0.2					0.9
Outside Survey Area	34	5.7	31	3.3	35	5.1	39	8.6	39	7.6	32	4.1	49	14.4	48.7
Kingston Upon Thames	1	0.2	3	0.3	4	0.5	12	2.5	8	1.6	6	0.8	7	2.0	8.0
Westfield (West) Shepherd's Bush													0	0.1	0.1
Central London	2	0.3	1	0.1	7	1.1	0	0.0	4	0.7	2	0.3	9	2.6	5.1
Westfield Stratford City (East) Olympic Park									3	0.6			2	0.5	1.0
Staines-upon-Thames Town Centre	2	0.3	6	0.7	3	0.5	1	0.2	0	0.1	1	0.1	4	1.1	1.6
Hammersmith Centre			3	0.3	2	0.3	2	0.5	0	0.1	1	0.1			2.4
Twickenham Centre					1	0.1	1	0.2	4	0.8	1	0.1			1.2
Ealing Centre	0	0.1							1	0.1	5	0.7	1	0.1	1.0
Kew Retail Park, Richmond									3	0.6			0	0.1	0.6
Richmond Centre			3	0.3					3	0.5	0	0.0	1	0.2	1.0
IKEA, Drury Way, Wembley	9	1.6	1	0.1	1	0.1	1	0.3	8	1.5	3	0.4	11	3.4	7.3
Hayes Bridge Retail Park, Hayes	3	0.5	1	0.1	2	0.2	7	1.6			2	0.2	1	0.4	3.0
Two Rivers Retail Park, Staines-upon-Thames	0	0.1	1	0.1	1	0.1			1	0.1			1	0.2	0.6
Great Western Retail Park, Southall	7	1.1	0	0.0			10	2.1	2	0.3	5	0.7	2	0.5	4.8
Other	10	1.6	13	1.3	15	2.2	5	1.1	4	0.7	5	0.6	11	3.3	10.9
Total	100	16.6	100	10.5	100	14.5	100	22.1	100	19.3	100	12.9	100	29.8	125.6

Notes:

Derived from Tables 8, 10, 11, 12
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 13: Comparison Goods Expenditure Pattern - Non-Bulky Goods (excluding Clothing & Footwear), by Zone, 2024

	Zone														Total Survey Derived Turnover (£m)
	1		2		3		4		5		6		7		
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	
LONDON BOROUGH OF HOUNSLOW	65	30.2	69	20.9	64	27.2	63	43.6	56	29.1	47	18.3	58	48.9	218.1
Hounslow Town Centre	53	24.3	7	2.0	8	3.5	47	32.5	30	15.4	10	4.0	0	0.2	81.9
Hounslow Town Centre Shops	53	24.3	7	2.0	8	3.5	47	32.5	30	15.4	10	4.0	0	0.2	81.9
Home Bargains, Hospital Road, Hounslow			0	0.0											0.0
Hounslow Edge/Out of Centre	0	0.1			1	0.4									0.5
Hospital Road Retail Area, Hospital Road, Hounslow					1	0.4									0.4
Tesco Express, Bath Road, Hounslow	0	0.1													0.1
Chiswick Town Centre	0	0.1					0	0.1	3	1.4	4	1.4	55	46.4	49.4
Chiswick Town Centre shops	0	0.1					0	0.1	3	1.4	4	1.4	54	45.5	48.6
Sainsbury's Superstore, Essex Place, Chiswick													1	0.8	0.8
Chiswick Edge/Out of Centre							0	0.1			0	0.1	0	0.3	0.5
B&Q, Gunnersbury Avenue, Chiswick							0	0.1			0	0.1	0	0.3	0.5
Brentford Town Centre	0	0.2	2	0.6			3	1.8	1	0.4	17	6.8			9.8
Brentford Town Centre shops	0	0.2	2	0.6			3	1.8	1	0.4	16	6.3			9.3
Morrisons, High Street, Brentford											1	0.5			0.5
Brentford Edge/Out of Centre	4	2.0	2	0.5	2	1.0	6	4.3	8	4.2	14	5.6	2	1.7	19.3
Tesco Extra, Syon Lane, Osterley Park, Isleworth	1	0.3	1	0.2	0	0.1	1	0.8	5	2.6	7	2.9	0	0.2	7.1
Homebase, Syon Lane, Brentford	1	0.3			1	0.4	1	0.5	1	0.3	2	0.6			2.1
971 Great West Road Retail Park, BRENTFORD (Carpetri)	1	0.6					3	2.2	0	0.3	1	0.5	1	0.5	4.0
West Cross Industrial Park, West Cross Way, BRENTFOR	0	0.2	1	0.3			1	0.8	2	0.9	4	1.5	1	0.8	4.5
Currys PC World, West Cross Way, Brentford	1	0.6			1	0.5			0	0.1			0	0.1	1.3
Other	0	0.1									0	0.1	0	0.1	0.2
Feltham Town Centre	3	1.5	48	14.3	45	19.1	2	1.4	1	0.3	0	0.2			36.7
Feltham Town Centre shops	3	1.5	47	14.2	43	18.2	2	1.4	1	0.3	0	0.2			35.6
Asda, The Centre, Tilley Road, Feltham					0	0.1									0.1
Tesco Superstore, High Street, Feltham			0	0.1	2	0.8									1.0
Lidl, New Road, Feltham			0	0.0											0.0
Feltham Edge/Out of Centre	1	0.6	8	2.4	3	1.1	0	0.1	0	0.0					4.2
Bunnings, Twickenham Road, Feltham					0	0.1									0.1
Tesco Superstore, Dukes Green Avenue, Feltham	1	0.5	3	0.9	1	0.3			0	0.0					1.7
Apex Retail Park, Hampton Road West, FELTHAM (Wicke	0	0.1	5	1.4	2	0.7	0	0.1							2.4
Adrian Hall Garden Centre, Snakey Lane, Feltham															
Other					0	0.1									0.1
Other in Borough	3	1.4	3	1.0	5	2.2	5	3.2	14	7.3	1	0.3	0	0.3	15.8
Hanworth Local Centre	0	0.1			3	1.4									1.5
Bedfont Local Centre			3	0.8											0.8
Heston Local Centre	0	0.2					1	0.8							0.9
Isleworth Town Centre			0	0.0	0	0.1			6	3.1	0	0.1			3.3
Osterley District Centre							0	0.2	3	1.3					1.6
Bulls Bridge Industrial Estate, Hayes Road, Hayes	0	0.1	0	0.1	0	0.1			1	0.7			0	0.2	1.2
Ivy Bridge Retail Park, Twickenham Road, ISLEWORTH (1	0.4	0	0.1	2	0.7	1	0.6	4	2.2	1	0.2			4.1
Tesco Extra, Mogden Lane, Twickenham, Isleworth							2	1.1	0	0.0					1.2
Other	2	0.7	0	0.1	1	0.5							0	0.1	1.3
Outside Survey Area	35	15.9	31	9.2	36	15.2	37	25.2	44	22.5	53	21.0	42	35.7	144.8
Kingston Upon Thames	2	1.1	3	0.8	15	6.3	8	5.2	10	4.9	6	2.3	3	2.2	22.9
Westfield (West) Shepherd's Bush	3	1.6			0	0.1	2	1.1	3	1.8	3	1.0	7	5.9	11.5
Central London	6	3.0	1	0.3	2	0.7	2	1.5	1	0.7	2	0.7	6	5.3	12.2
Westfield Stratford City (East) Olympic Park	2	0.9					1	0.6			1	0.2	7	6.1	7.9
Staines-upon-Thames Town Centre	3	1.6	10	3.1	4	1.6	1	0.4	0	0.1	3	1.0			7.8
Hammersmith Centre			2	0.5	1	0.4	1	1.0	0	0.2	0	0.2	4	3.1	5.4
Twickenham Centre	1	0.3	1	0.2	1	0.3	6	4.0	13	6.9					11.6
Ealing Centre	0	0.1							1	0.3	19	7.4	1	0.8	8.6
Kew Retail Park, Richmond	0	0.1			0	0.0	1	0.5	1	0.6	5	1.8	3	2.7	5.8
Richmond Centre	1	0.3					0	0.1	6	3.1	1	0.4	2	2.0	5.9
IKEA, Drury Way, Wembley	2	0.9	1	0.2	1	0.3	2	1.1	0	0.1	2	0.6	2	1.9	5.1
Hayes Bridge Retail Park, Hayes	4	1.9	1	0.2			2	1.0			3	1.1			4.3
Two Rivers Retail Park, Staines-upon-Thames	0	0.1	5	1.4	3	1.3									2.8
Great Western Retail Park, Southall	2	0.8					0	0.1	0	0.1	2	0.9	0	0.2	2.2
Other	7	3.3	8	2.4	10	4.1	13	8.7	7	3.6	8	3.2	7	5.6	30.9
Total	100	46.1	100	30.1	100	42.4	100	68.8	100	51.6	100	39.3	100	84.6	362.9

Notes:

Derived from Tables 2, 3, 4, 5, 6, 7, 9
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

Table 14: Comparison Goods Expenditure Pattern - Combined, by Zone, 2024

	Zone														Total Survey Derived Turnover (£m)	Inflow	
	1		2		3		4		5		6		7			(%)	(£m)
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m			
LONDON BOROUGH OF HOUNSLOW	63	56.7	63	36.6	60	48.6	64	82.4	53	52.4	45	33.5	46	71.5	381.6		
Hounslow Town Centre	49	44.1	9	5.1	7	6.1	46	58.8	29	28.6	13	9.6	0	0.2	152.4	2	3.0
Hounslow Town Centre Shops	49	44.1	9	5.1	7	6.1	46	58.7	29	28.6	13	9.6	0	0.2	152.4		
Home Bargains, Hospital Road, Hounslow			0	0.0			0	0.0							0.1		
Hounslow Edge/Out of Centre	0	0.1			0	0.4									0.5		
Hospital Road Retail Area, Hospital Road, Hounslow					0	0.4									0.4		
Tesco Express, Bath Road, Hounslow	0	0.1													0.1		
Chiswick Town Centre	0	0.1					0	0.1	2	2.0	2	1.7	37	58.9	62.8	3	1.9
Chiswick Town Centre shops	0	0.1					0	0.1	2	2.0	2	1.7	37	57.7	61.7		
Sainsbury's Superstore, Essex Place, Chiswick													1	1.2	1.2		
Chiswick Edge/Out of Centre	1	1.3	0	0.1			1	1.0	1	0.6	2	1.3	4	6.6	10.8		
B&Q, Gunnersbury Avenue, Chiswick	1	1.3	0	0.1			1	1.0	1	0.6	2	1.3	4	6.6	10.8		
Brentford Town Centre	0	0.3	1	0.8			4	4.7	1	1.1	11	7.9			14.7	4	0.6
Brentford Town Centre shops	0	0.3	1	0.8			4	4.7	1	1.1	10	7.4			14.2		
Morrisons, High Street, Brentford											1	0.5			0.5		
Brentford Edge/Out of Centre	5	4.0	1	0.6	4	3.0	7	10	10	10.3	15	11.3	3	5.1	43.8		
Tesco Extra, Syon Lane, Osterley Park, Isleworth	0	0.4	0	0.2	0	0.1	1	0.9	4	3.6	4	3.1	1	0.9	9.2		
Homebase, Syon Lane, Brentford	1	0.7			2	1.7	2	2.1	3	3.1	3	2.4	1	0.9	10.9		
971 Great West Road Retail Park, BRENTFORD (C)	2	1.5	0	0.1	1	0.5	4	5.3	1	1.0	3	2.5	1	1.1	11.9		
West Cross Industrial Park, West Cross Way, BRENTFORD	0	0.3	0	0.3	0	0.0	1	1.0	2	1.9	3	2.4	1	1.6	7.5		
Currys PC World, West Cross Way, Brentford	1	0.9	0	0.0	1	0.7			0	0.1			0	0.4	2.1		
Other	0	0.2					0	0.2	1	0.7	1	0.9	0	0.2	2.2		
Feltham Town Centre	3	2.9	39	22.4	38	30.4	2	2.6	0	0.4	1	1.0			59.8	2	1.2
Feltham Town Centre shops	3	2.9	38	22.1	36	29.2	2	2.6	0	0.4	1	1.0			58.2		
Asda, The Centre, Tilley Road, Feltham					0	0.2									0.2		
Tesco Superstore, High Street, Feltham			1	0.3	1	0.9									1.2		
Lidl, New Road, Feltham			0	0.0	0	0.1									0.2		
Feltham Edge/Out of Centre	2	1.4	11	6.4	7	6.0	1	0.9	0	0.1					14.7		
Bunnings, Twickenham Road, Feltham	0	0.1	3	1.9	2	1.8	1	0.7	0	0.0					4.5		
Tesco Superstore, Dukes Green Avenue, Feltham	1	0.7	2	1.0	1	0.5			0	0.0					2.4		
Apex Retail Park, Hampton Road West, FELTHAM	1	0.5	6	3.4	4	2.9	0	0.2							6.9		
Adrian Hall Garden Centre, Snakey Lane, Feltham			0	0.0	0	0.2									0.2		
Other	0	0.1	0	0.1	1	0.6									0.7		
Other in Borough	3	2.4	2	1.2	3	2.7	4	4.8	10	9.4	1	0.7	1	0.8	22.0		
Hanworth Local Centre	0	0.1	0	0.0	2	1.7									1.8		
Bedfont Local Centre			1	0.8											0.8		
Heston Local Centre	0	0.2					1	0.8							0.9		
Isleworth Town Centre	0	0.2	0	0.0	0	0.1	0	0.1	3	3.1	0	0.2	0	0.1	3.9		
Osterley District Centre	0	0.0					0	0.2	2	1.5					1.8		
Bulls Bridge Industrial Estate, Hayes Road, Hayes	0	0.1	0	0.1	0	0.1	1	0.7					0	0.2	1.2	2	0.0
Ivy Bridge Retail Park, Twickenham Road, ISLEWORTH	1	0.7	0	0.1	1	0.7	1	1.2	4	3.9	1	0.5	0	0.3	7.4	2	0.1
Tesco Extra, Mogden Lane, Twickenham, Isleworth					0	0.0	1	1.7	0	0.0					1.7	2	0.0
Other	1	1.0	0	0	0	0	1	1	0	0			0	0	2		
Outside Survey Area	37	32.8	37	21.1	40	32.6	36	46.0	47	45.9	55	40.6	54	85.7	304.6		
Kingston Upon Thames	2	2.1	3	1.7	18	14.3	10	13.3	9	8.4	5	3.5	4	6.5	49.9		
Westfield (West) Shepherd's Bush	5	4.3	0	0.1	0	0.1	3	3.4	4	4.3	3	2.3	9	13.4	27.9		
Central London	4	3.4	1	0.7	2	1.9	1	1.6	2	1.6	3	2.0	7	11.1	22.3		
Westfield Stratford City (East) Olympic Park	1	1.1	2	1.1			1	1.6	1	1.4	1	0.4	8	13.2	18.9		
Staines-upon-Thames Town Centre	3	3.0	13	7.6	5	3.8	1	0.8	0	0.3	2	1.7			17.2		
Hammersmith Centre			1	0.8	1	0.6	1	1.5	0	0.3	1	0.5	9	13.7	17.5		
Twickenham Centre	0	0.3	0	0.2	1	0.8	3	4.2	10	10.0	0	0.1			15.5		
Ealing Centre	0	0.4			0	0.2			1	1.1	20	14.7	1	1.3	17.7		
Kew Retail Park, Richmond	1	0.5			0	0.0	1	0.9	2	2.4	7	5.1	4	6.9	15.7		
Richmond Centre	2	1.6	0	0.3	0	0.4	1	1.0	7	7.3	2	1.3	2	2.5	14.3		
IKEA, Drury Way, Wembley	3	2.4	0	0.3	0	0.4	1	1.4	2	1.6	1	1.1	3	5.2	12.4		
Hayes Bridge Retail Park, Hayes	3	2.8	1	0.3	0	0.2	2	3.0			2	1.4	0	0.4	8.1		
Two Rivers Retail Park, Staines-upon-Thames	0	0.3	6	3.6	2	1.9			0	0.1			0	0.2	6.0		
Great Western Retail Park, Southall	2	2.0	0	0.0			2	2.2	0	0.4	3	1.9	0	0.7	7.3		
Other	10	8.7	8	4.3	10	7.9	9	11.1	7	6.7	6	4.5	7	10.7	53.9		
Total	100	89.4	100	57.7	100	81.1	100	128.4	100	98.3	100	74.1	100	157.2	686.2		

Notes:
Derived from Table 13
Excludes responses Special Forms of Trading, 'Don't do this', 'Don't know / varies', and 'Other'
Figures may not add due to rounding

2021 Prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

TABLE 15: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN HOUNSLOW

Table 15a: Estimated 'Capacity' for Comparison Goods Facilities

Year	Benchmark Turnover £m ¹	Turnover - £m ²	Inflow - £m	Surplus Expenditure - £m
2024	156.0	152.9	3.0	0.0
2029	173.5	163.3	3.3	-7.0
2034	199.2	186.0	3.7	-9.5
2037	216.4	202.6	4.0	-9.8
2043	255.4	242.4	4.8	-8.2

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 20 (February 2023)
2. Assumes constant market share claimed by Hounslow facilities from Study Area

2021 Prices

Table 15b: Quantitative Need for Additional Comparison Goods Floorspace

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2024	0.0	0	0
2029	-7.0	0	0
2034	-9.5	0	0
2037	-9.8	0	0
2043	-8.2	0	0

Notes:

1. Average sales density assumed to be £5,500 per sq.m which AK Planning considers to be towards the higher end of what could be achieved in Hounslow
2. Average sales density assumed to be £3,250 per sq.m which WYG considers to be towards the lower end of what could be achieved in Hounslow

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 20 (February 2023)

2021 prices

Table 15c: Extant Comparison Goods Commitments

Destination	Reference	Proposal	Gross Retail Floorspace (sq.m)	Net Comparison Floorspace (sq.m)	Estimated Sales Density (£/sq.m)	Estimated Comparison Turnover (£m)	Status
Hounslow High Street Quarter	00616/F/P23	High Street Quarter Redevelopment including 528 residential units, multi- screen cinema, commercial retail uses (A1- A5) and car parking.	8,897	3,737	5,500	20.6	Implemented
TOTAL				3,737		20.6	

Notes:

Commitment provided by London Borough of Hounslow Council

[Hounslow High Street Quarter](#)

Gross floorspace derived from Decision Notice which refers to maximum floorspace (Use Classes A1-A5).

Comparison floorspace based on 60% of gross (net comparison is 30%).

2021 prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

TABLE 15: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN CHISWICK

Table 15a: Estimated 'Capacity' for Comparison Goods Facilities

Year	Benchmark Turnover £m ¹	Turnover - £m ²	Inflow - £m	Surplus Expenditure - £m
2024	75.5	73.6	1.9	0.0
2029	84.0	78.6	2.0	-3.4
2034	96.5	89.5	2.3	-4.6
2037	104.8	97.5	2.5	-4.8
2043	123.7	116.7	3.0	-4.0

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 20 (February 2023)
2. Assumes constant market share claimed by Chiswick facilities from Study Area

2021 Prices

Table 15b: Quantitative Need for Additional Comparison Goods Floorspace

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2024	0.0	0	0
2029	-3.4	0	0
2034	-4.6	0	0
2037	-4.8	0	0
2043	-4.0	0	0

Notes:

1. Average sales density assumed to be £5,500 per sq.m which AK Planning considers to be towards the higher end of what could be achieved in Chiswick
2. Average sales density assumed to be £3,250 per sq.m which WYG considers to be towards the lower end of what could be achieved in Chiswick

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 20 (February 2023)

2021 prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

TABLE 15: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN BRENTFORD

Table 15a: Estimated 'Capacity' for Comparison Goods Facilities

Year	Benchmark Turnover £m ¹	Turnover - £m ²	Inflow - £m	Surplus Expenditure - £m
2024	59.2	58.6	0.6	0.0
2029	65.8	62.6	0.6	-2.6
2034	75.6	71.2	0.7	-3.6
2037	82.1	77.6	0.8	-3.7
2043	96.9	92.9	0.9	-3.1

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 20 (February 2023)
2. Assumes constant market share claimed by Brentford facilities from Study Area

2021 Prices

Table 15b: Quantitative Need for Additional Comparison Goods Floorspace

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2024	0.0	0	0
2029	-2.6	0	0
2034	-3.6	0	0
2037	-3.7	0	0
2043	-3.1	0	0

Notes:

1. Average sales density assumed to be £5,500 per sq.m which AK Planning considers to be towards the higher end of what could be achieved in Brentford
2. Average sales density assumed to be £3,250 per sq.m which WYG considers to be towards the lower end of what could be achieved in Brentford

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 20 (February 2023)

2021 prices

Table 15c: Extant Comparison Goods Commitments

Destination	Reference	Proposal	Gross Retail Floorspace (sq.m)	Net Comparison Floorspace (sq.m)	Location	Estimated Sales Density (£/sq.m)	Estimated Comparison Turnover (£m)	Status
Brentford Waterside, Block D, land and buildings at 98-109 High Street	00607/BN/S1	Demolition of existing building and redevelopment to provide 96 residential units together with flexible commercial floorspace (Class A1/A2/A3/A4/B1& D1 use) with associated public realm improvements, landscaping, and car parking.	816	163	-	5,500	0.9	Planning Permission
TOTAL				4,447			0.9	

Notes:

Commitment provided by London Borough of Hounslow Council

Waterside Development

Gross floorspace is taken from Condition 6 on the Decision Notice.

Net comparison floorspace taken from Retail Statement submitted with application.

Sales density derived from Global Data.com - Morrison's

Waterside Block D

Gross floorspace taken from planning application

Assessed than 1/3 of gross floorspace would be occupied by comparison goods retailers

Assessed net floorspace is 60% of gross

2021 prices

Table 15d: Net Quantitative Need for Additional Comparison Goods Floorspace in Hounslow

Year	Surplus £m	Commitments £m	Residual £m	Floorspace Requirement (sq m net)	
				Min ¹	Max ²
2024	0.0	#REF!	#REF!	#REF!	#REF!
2029	-2.6	#REF!	#REF!	#REF!	#REF!
2034	-3.6	#REF!	#REF!	#REF!	#REF!
2037	-3.7	#REF!	#REF!	#REF!	#REF!
2043	-3.1	#REF!	#REF!	#REF!	#REF!

Notes:

1. Average sales density assumed to be £5,250 per sq.m which WYG considers to be towards the higher end of what could be achieved in Hounslow
2. Average sales density assumed to be £3,000 per sq.m which WYG considers to be towards the lower end of what could be achieved in Hounslow

Residual calculated by subtracting turnover of commitments (sourced from Table 15c) from surplus expenditure (sourced from Table 15a).

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2016 prices

**LONDON BOROUGH OF HOUNSLOW
RETAIL AND TOWN CENTRE NEEDS STUDY - 2024 UPDATE**

TABLE 15: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN FELTHAM

Table 15a: Estimated 'Capacity' for Comparison Goods Facilities

Year	Benchmark Turnover £m ¹	Turnover - £m ²	Inflow - £m	Surplus Expenditure £m
2024	75.7	74.5	1.2	0.0
2029	84.3	79.6	1.3	-3.4
2034	96.7	90.6	1.5	-4.6
2037	105.1	98.7	1.6	-4.8
2043	124.0	118.2	1.9	-4.0

Notes:

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 20 (February 2023)
2. Assumes constant market share claimed by Feltham facilities from Study Area

2021 Prices

Table 15b: Quantitative Need for Additional Comparison Goods Floorspace

Year	Surplus £m	Floorspace Requirement	
		Min ¹	Max ²
2024	0.0	0	0
2029	-3.4	0	0
2034	-4.6	0	0
2037	-4.8	0	0
2043	-4.0	0	0

Notes:

1. Average sales density assumed to be £5,500 per sq.m which AK Planning considers to be towards the higher end of what could be achieved in Feltham
 2. Average sales density assumed to be £3,250 per sq.m which WYG considers to be towards the lower end of what could be achieved in Feltham
- Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 20 (February 2023)

2021 prices



Alder King Planning Consultants
Pembroke House, 15 Pembroke Road, Clifton, Bristol BS8 3BA