



London Borough of Hounslow

Retail and Town Centre Needs Study - Update

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Volume 1 – Main Report
Final Draft



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**London Borough
of Hounslow**

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1.0 Introduction

1.1 Instruction

1.1.1 WYG Planning ('WYG') has been commissioned by the London Borough of Hounslow ('the Council') to undertake a Retail and Town Centre Needs Study update for its administrative area. The key purpose of this study is to act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail development. The Study supersedes the previous 2013 Joint Retail Needs Study: Further Update for London Borough of Hounslow.

1.1.2 This Study will be used to inform the emerging Local Plan Review. The Council is currently undertaking two area-specific partial reviews of the Local Plan – the Great West Corridor (GWC) Plan and the West of Borough (WoB) Plan, alongside minor amendments to the Local Plan. The GWC Plan and WoB Plans will be key planning policy documents for the respective areas that will help to shape development of the area over the next 15 years. Initial consultation on the plans was held with stakeholders in early 2016 and Regulation 18 consultation held October to December 2017. The Publication consultation of the documents is anticipated to be held Summer 2018.

1.1.3 The study explores retail need over the period to 2033 and provides an up to date review of the performance of the town centres in the Borough. The aims and objectives for the Study include:

- providing a comprehensive assessment of the need for retail floorspace in the Borough for the period up to 2033 following an assessment of consumer expenditure growth and population projections;
- assessing the need for commercial, leisure and other town centre uses;
- reviewing the current retail trends and shift to online shopping;
- reviewing the current and emerging policies, including the draft London Plan, to assess the impact of these on the need for retail floorspace;
- conducting health checks on the function and vitality and viability of the four town centres;
- providing recommendations exploring the shopping role of the town centres, other town centre uses and recommendations on a Future Strategy, its implementation and monitoring.

1.1.4 Key contributions to the above objectives have been a number of items of new empirical research. First, we have commissioned NEMS Market Research to undertake a new a shopping survey of 700 households. The Study Area for the survey comprises 7 zones which largely follows the previous zones utilised in the 2010 joint study and are based on postcode areas.

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- 1.1.5 The second area of empirical research has been in relation to the assessment of the health of the 4 town centres in the Borough. This exercise has incorporated land use surveys of these defined centres, along with a review of health check indicators and an appraisal of the qualitative results of the household survey data.
- 1.1.6 In addition, as part of the assessment of key town centre health issues, engagement has taken place with key stakeholders to seek to obtain views on, *inter alia*, existing town centre strengths, weaknesses, opportunities and threats and potential suggested town centre improvements.
- 1.1.7 Finally, the study is also informed by industry research having regard to published recognised retail data including demand/requirements from retailers for presence in the defined town centres.

1.2 Structure of Study

- 1.2.1 Our study is structured as follows:
- Section 2 outlines the current national and local planning policy context for retail and leisure development issues in the Borough;
 - Section 3 provides a context for the Study by outlining the current and emerging key retail and leisure trends in the UK;
 - Section 4 sets out the key market research which informs the study;
 - Section 5 provides the socio demographic and sub-regional context;
 - Section 6 sets out the existing retail and leisure provision and shopping patterns for the Borough;
 - Section 7 provides our assessment of quantitative need for further convenience and comparison goods floorspace in the council area over the assessment period;
 - Section 8 contains our qualitative assessment/overview of the vitality and viability of Hounslow town centre including a review of office and leisure uses;
 - Section 9 contains our qualitative assessment/overview of the vitality and viability of Chiswick town centre including a review of office and leisure uses;
 - Section 10 contains our qualitative assessment/overview of the vitality and viability of Brentford town centre including a review of office and leisure uses;
 - Section 11 contains our qualitative assessment/overview of the vitality and viability of Feltham town centre including a review of office and leisure uses;
 - Section 12 summarises our key findings and sets out our recommendations.

2.0 Planning Policy Context

2.1 Introduction

2.1.1 Given that this Study seeks to provide evidence to assist in the production of the Council's emerging Local Plan Reviews, specifically the Great West Corridor (GWC) Plan and West of Borough (WoB) Plan, it is important to review existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study and how it may impact upon the production of future development plan policy. We also summarise the London Borough of Hounslow adopted and emerging planning policies, insofar as they are relevant to retail and town centre matters.

2.2 National Planning Policy Framework (NPPF)

2.2.1 The National Planning Policy Framework (NPPF) was originally published in March 2012. The revised framework was recently published on 24 July 2018. The NPPF sets out the Government's planning policies for England and how these are expected to be applied. It sets out the Government's requirements for the planning system only to the extent that it is relevant, proportionate and necessary to do so.

2.2.2 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. The economic objective seeks to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places at the right time to support growth. In terms of plan-making, it is stated that the planning system should be genuinely plan led and local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.

2.2.3 In terms of economic development, section 6 of the NPPF identifies that planning policies should create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity. Planning policies and decisions should recognise and address specific locational requirements of different sectors.

2.2.4 The NPPF stresses planning policies should set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth and be flexible enough to accommodate needs not anticipated in the plan and to enable a rapid response to changes in economic circumstances.

2.2.5 The NPPF recognises the need to ensure the vitality and viability of towns and cities and support the role that they play at the heart of local communities by taking a positive approach to their growth, management and adaptation. Paragraph 85 of the NPPF indicates that planning policies should:

- define a network and hierarchy of centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least 10 years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
- where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.2.6 Paragraph 86 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 88 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale rural development.

2.2.7 Paragraph 89 indicates that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500sq m.

2.2.8 Paragraph 90 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.

2.2.9 The NPPF also recognises that retail and leisure activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

2.3 Ensuring the Vitality of Town Centres Planning Practice Guidance

- 2.3.1 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote beneficial competition within and between town centres, and create attractive and diverse places for people to want to live, visit and work.
- 2.3.2 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.
- 2.3.3 Such strategies should seek to address the following matters:
- the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
 - consideration of the vision for the future of each town centre and the most appropriate mix of uses to enhance overall vitality and viability;
 - the evaluation of the town centre to assess whether it can accommodate the scale of assessed need, and if it cannot, evaluating different policy options to help accommodate the need;
 - the timeframe for new retail floorspace to be delivered;
 - what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
 - the consideration of how car parking provision be enhanced and both parking charges and enforcement be made proportionate, in order to encourage town centre vitality.
- 2.3.4 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms.

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- 2.3.5 Paragraph 007 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.
- 2.3.6 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their Local Plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

2.4 The London Plan

- 2.4.1 The London Plan is the overall strategic plan for London which sets out an integrated economic, environmental, transport and social framework for the development of London over the next 20-25 years. The London Plan covers matters of strategic importance to Greater London and should take account of three cross-cutting themes: economic development and wealth creation; social development; and improvement of the environment.
- 2.4.2 The Mayor is legally required to keep the London Plan under review. The current London Plan published in March 2016 is consolidated with all alterations since 2011. The policies within this document currently form part of the development plan for Greater London and should be taken into account in taking relevant planning decisions.

London Plan 2015

- 2.4.3 The current London Plan guides development in Greater London to 2036. Chapter 2 relates to London's Places and includes Policy 2.15 on town centres and Chapter 4 contains policies on London's Economy with the following policies of relevance to retail and town centre development:

Policy 2.15 Town Centres

- 2.4.4 The policy sets out the network of town centres across London: International Centre, Metropolitan Centre, Major Centre, District Centre and the Central Activities Zone (CAZ). In preparing Local Plans, the policy states boroughs should:
- sustain and enhance the vitality and viability by ensuring local capacity requirements take realistic account of changes in consumer expenditure and behaviour and in light of capacity requirements, identify town centre boundaries, primary shopping areas and frontages;
 - proactively manage the changing roles of centres, particularly those with surplus retail and office floorspace and consider the scope for consolidating them by encouraging a wider range of services;

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- co-ordinate with neighbouring authorities to relate the existing and planned roles of centres to the network as a whole and achieve its broader objectives; and
 - Support and encourage community development, town centre management, partnerships and strategies including Business Improvement Districts (BID) to promote safety, security, environmental quality and town centre renewal.

Policy 4.7 Retail and Town Centre Development

- 2.4.5 The strategic aim of the policy supports a strong, partnership approach to assessing need and bringing forward capacity for retail, commercial, culture and leisure development in town centres. In preparing Local Plans, boroughs should identify future levels of retail and commercial floorspace need, undertake regular town centre health checks, take a proactive approach to identify capacity and bring forward development within, or where appropriate, on the edge of centres, firmly resist out of centre development and manage existing out of centre retail and leisure development in line with the sequential approach, seeking to reduce car dependency, improve access by public transport, walking and cycling.

Policy 4.8 Supporting a successful and diverse retail sector and related facilities and services

- 2.4.6 The policy states the Mayor, boroughs and other stakeholders should support a successful, competitive and diverse retail sector which promotes sustainable access to the goods and services that Londoners need and the broader objectives of the spatial structure of this Plan, especially town centres. Local Plans should take a proactive approach and bring forward capacity for additional comparison goods retailing particularly in International, Metropolitan and Major centres and support convenience retail particularly in District, Neighbourhood and local centres to secure a sustainable pattern of provision and strong, lifetime neighbourhoods. In addition, the policy states they should identify areas under-served in local convenience shopping and services and support additional facilities at an appropriate scale, support the range of London's markets and support the development of e-tailing and more efficient delivery systems.

Policy 4.10 New and emerging economic sectors

- 2.4.7 The policy supports innovation and research including strong promotion of London as a research location and seeks to work with developers, businesses and where appropriate higher education institutions and other relevant research and innovation agencies to ensure availability of a range of workspaces, including start-up space, co-working space and 'grow on' space.

New London Plan

- 2.4.8 The new draft London Plan was published for consultation in December 2017 until March 2018. The current London Plan is still the adopted Development Plan, but the draft London Plan is a material consideration in planning decisions and it will gain more weight as it moves through the process towards adoption. The provisional timetable states examination of the Plan is likely to take place from November 2018, with adoption anticipated in Winter 2019/20.
- 2.4.9 The draft policies of relevance are briefly summarised below:

Emerging Policy SD6 Town Centres

- 2.4.10 The vitality and viability of London's varied town centres should be promoted and enhanced for a diverse range of uses including employment, business space, shopping, culture, leisure, night-time economy, tourism, civic, community, social infrastructure and residential development. Town centres should also be promoted as locations for mixed-use or housing led intensification and higher density renewal, securing a high-quality environment and the primary locations for commercial activity beyond the CAZ. The adaption and restructuring of town centres is supported in response to challenges and opportunities presented through multi-channel shopping and changes in technology.

Emerging Policy SD7 Town Centre Network

- 2.4.11 The draft policy sets out the town centre network across London and states the changing roles of centres should be proactively managed in relation to the network as a whole. The policy still classifies, as per current policy 2.15, International, Metropolitan, Major and District Centres alongside the extent of the CAZ. The classification of International, Metropolitan and Major town centres can only be changed through the London Plan, whilst changes to District, Local and Neighbourhood Centres can be brought forward through Local Plans.

Emerging Policy SD8 Town Centres: development principles and Development Plan Documents

- 2.4.12 The policy requires development plans to take a town centre first approach by: adopting a sequential approach to accommodating town centre uses including retail, commercial, offices, leisure, entertainment, culture, tourism and hotels and firmly resisting out of centre development, with limited exceptions for existing viable office locations in Outer London; providing an impact assessment on proposals for new, extensions to existing, edge of out of centre development for town centre uses not in accordance with the development plan; and realise the full potential of existing out of centre retail and leisure parks to deliver housing intensification through redevelopment.
- 2.4.13 The policy also requires development plans to define the boundaries of town centres along with specific designations including primary shopping areas and frontages. Reference is also made to developing policies for the edge and fringes of town centres, revising the extent of shopping frontages where surplus to forecast demand and introducing greater flexibility and identifying centres which have particular scope to accommodate new commercial development and higher density housing.

Emerging Policy SD9 Town Centres: local partnerships and implementation

- 2.4.14 The emerging policy promotes strategic and local partnership approaches, community engagement, town centre management, business associations and Business Improvement Districts (BIDs) to develop strong, resilient and adaptable town centres. Each centre should have a Town Centre Strategy produced in partnership at the local level which is inclusive and representative of the local community. To inform policy regular town centre health checks should be undertaken.

Emerging Policy E1 Offices

- 2.4.15 The policy states improvements to the competitiveness and quality of office space of different sizes should be supported by new office provision, refurbishment and mixed-use development. Increases in the current stock should be supported where there is evidence of sustained demand for office-based activities, having regard to the projections within the London Plan. For Outer London the plan identifies around 23% of the total growth from 2016-2041 will take place here requiring between 0.3m and 1.5m sq m gross internal floorspace.
- 2.4.16 Emerging Policy E2 supports the protection of low-cost business space, whilst Policy E3 relates to affordable workspaces.

2.5 Local Planning Policy Context

- 2.5.1 The relevant adopted and emerging development plans for the Council area are:

Adopted

- Local Plan 2015-2030 – Adopted September 2015

Emerging

- Local Plan Review – Preferred Options Consultation (October-December 2017)
 - West of Borough Local Plan
 - Great West Corridor Local plan
 - Amendments to existing Local Plan 2015
- Butts Farm Neighbourhood Plan – Area and Forum Approved (December 2013)
- Osterley Neighbourhood Plan – Area Approved (July 2016)

Development Plan Policy

Local Plan 2015-2030

Policy TC1 – Town and Neighbourhood Centre Network

- 2.5.2 The policy identifies that the Council will maintain a network of successful town and neighbourhood centres each with their own role and function. It identifies the boroughs network of town and neighbourhood centres, consisting of four town centres: Hounslow (a Metropolitan Centre), Chiswick (a Major Centre), and Brentford and Feltham (District Centres), supported by seven large neighbourhood centres in Hounslow West, Bedfont, Isleworth, Cranford, Hanworth, Heston and Old Isleworth, and 36 small neighbourhood centres.

2.5.3 The policy requires development proposals to be located appropriately in the context of the town and neighbourhood centre network.

Policy TC2 – Ensuring the future vitality of town centres

2.5.4 The policy promotes the regeneration of the town centres, with particular emphasis on Hounslow and Brentford, as part of the broader regeneration in these locations.

2.5.5 Regeneration of Hounslow Town Centre is promoted in line with the Hounslow Town Centre Masterplan, including the redevelopment of remaining key sites such as High Street Quarter as a focus for retail, leisure and entertainment growth including a vibrant evening economy.

2.5.6 The regeneration of Brentford Town Centre seeks to encourage appropriate increases in retail floorspace, leisure and cultural uses and reconnecting the High Street with historical assets and waterside environments, whilst improving links from Brentford to the Great West Road.

2.5.7 The policy supports a re-visioning of Feltham Town Centre to build on recent development and consolidate its role as a 'District Centre'. This is sought through retaining the existing level of retail floorspace, increasing the leisure and entertainment offer encouraging evening activity.

2.5.8 For Chiswick, the policy refers to sustaining and consolidating the range and quality of shopping provision in Chiswick Town Centre and an appropriate variety of non-retail uses, which are not-over concentrated, will be supported to maintain the centres diverse role.

2.5.9 For each of the centres the policy makes reference to recognising the town centres as a place for business and networking and supporting initiatives and enterprises which support this.

Policy TC3 – Managing the growth of retail and other main town centre uses

2.5.10 The policy states proposals for retail floorspace and other main town centre uses will be directed to the four town centres and proposals in other locations will be considered in line with sequential and impact assessments. Larger scale retail developments are directed to primary shopping areas or other town centre allocated sites.

2.5.11 Development proposals of over 500sq m retail floorspace or 2,500sq m of other main town centre uses floorspace proposed outside of the town centres will need to be accompanied by an impact assessment.

Policy TC4 – Managing uses in town centres

2.5.12 The policy seeks to maintain and enhance the fundamental detail role of town centres, whilst ensuring they are responsive to changing needs and provide scope for a diversity of uses. The policy establishes town centre boundaries, primary shopping area and primary and secondary shopping frontages for each

of the four town centres and seeks to retain a high proportion of A1 retail uses in the primary frontages and shopping areas.

- 2.5.13 The policy supports a diversity of uses, particularly in secondary and undesignated frontages/areas, where there is surplus retail and/or office floorspace and will encourage proposals that achieve an active frontage during the day and evening. The policy will also consider the cumulative impact of proposals on the vitality and vibrancy of town centres and amenity of local residents.

Policy ED1 – Promoting Employment Growth and Development

- 2.5.14 Policy ED1 seeks to secure business opportunities stimulated by the borough's location close to Heathrow and central London, by ensuring that sufficient capacity is provided for anticipated sectors of employment growth, by promoting new office-based employment in the main town centres, as well as employment-based growth within the Great West Corridor.

Policy ED2 – Maintaining the Borough's employment land supply

- 2.5.15 The policy protects Key Existing Office Locations as identified on the Policies Map, namely the four town centres, Chiswick Business Park, Bedfont Lakes and sections of the Great West Road.

Policy ED3 – Hotels and Visitor Accommodation

- 2.5.16 The policy promotes new visitor accommodation in appropriate locations to support local businesses and enhance the tourism offer. Proposals for visitor accommodation will be directed to the four town centres and proposals in other locations will be considered against sequential and impact assessments.

Emerging Development Plan Policy

Local Plan Review

- 2.5.17 The Local Plan Review is in fairly early stages of production, with a draft Preferred Options consultation document published for consultation from October to December 2017. Further consultation is expected in Summer 2018.
- 2.5.18 The Local Plan Review comprises The West of Borough Local Plan Review, Great Western Corridor Local Plan Review and amendments to the 2015 Local Plan. A brief overview of the draft policies of relevance to this study are summarised below:

Great Western Corridor Local Plan Review

- 2.5.19 The Great Western Corridor Local Plan Review identifies the extent of the Great West Corridor and sets out the Council's vision for how the area will grow and develop over the next 15 years. It provides further detail and expands on Policy SV1 – Great West Corridor Plan within the Adopted Hounslow Local Plan.

2.5.20 There are no town centres located within the plan area. However, relevant policies concerning commercial office uses are summarised below:

- GWC1 Employment Growth – the policy seeks to provide a mix of employment spaces attractive for the entire business community in existing and potential growth locations. Mixed use employment and residential development along the corridor will be supported as well as intensification of employment sites and premises to provide at least 490,000sq m of workspaces in the area. The policy also refers to supporting active uses such as retail along the Corridor.
- P1 Great West Corridor West – the policy supports the opportunity for mixed-use employment led development in the west area of the Great Western Corridor and identifies a number of growth areas.
- P2 Great West Corridor Central – supports growth within the three distinct character areas: the 'River Brent Quarter', the 'London Gateway' and 'London Showroom'.
- P3 Great West Corridor East – the area is acknowledged to include a variety of commercial uses including big box retailers. Policy states it provides an opportunity for high-density, mixed use development including a new local centre located around a new rail station providing high quality office and commercial space, alongside valuable retail and mixed-tenure residential uses.

West of Borough Local Plan Review

2.5.21 The West of Borough Local Plan Review complies with the commitment in Policy SV2 of the Adopted Local Plan to provide the Council's vision for how the area will grow and develop over the next 15 years.

2.5.22 The plan acknowledges the uncertainty associated with the future role and expansion of Heathrow Airport and identifies opportunities for maximising the benefits of the airport, whether a third runway is delivered or not. The plan also seeks to elaborate on Hounslow's part of the London Plan Heathrow Opportunity Area designation. Of particular relevance to this study, the plan contains regeneration and development opportunities for Feltham Town Centre following the designation of the town as a Housing Zone in 2016 by the Mayor of London.

2.5.23 The following emerging policies of relevance to this study are briefly summarised below:

- WOB2 Employment Growth – the policy seeks to secure a strong economy in the area by creating conditions for economic growth particularly around Heathrow Airport and Feltham Town Centre.
- WOB6 Health and Wellbeing – the policy states the Council will seek to ensure community needs are met by improving the quality of development, the environmental, physical and social infrastructure that supports growth in order to encourage active healthy lifestyles.
- P1 Feltham Place Policy – the policy seeks to deliver of high quality mixed-use residential led neighbourhoods with supporting infrastructure in line with Feltham Masterplan. In terms of the town centre the following growth options are identified:

- Redevelopment of the area around the station, to create a high density mixed-use development, the Station Quarter, providing a minimum of 1,400 new homes, 4,000sq m new ground floor retail and A1-A4 commercial uses (187FTE jobs) in appropriate locations on Bedfont Lane and New Road.
- Redeveloping and intensifying further sites within the town centre to create a stronger urban centre, providing at least 331 new homes and 8,200sq m new retail space.
- Requires new development to provide active retail frontage along the High Street, with ground floor retail, restaurant and café uses (A1-A4).
- Redevelopment and intensification of Feltham East to provide 3,000 new homes, 3,000sq m retail/cafes, 12,000sq m leisure space and 11,000sq m office, commercial and community facilities.
- P3 Heathrow Gateway Place Policy – policy seeks to create a high density mixed use development around the new Southern Access railway station providing a mix of offices, apartments, hotels, shops, bars and restaurants.
- P4 Airport Business Park Place Policy – the policy refers to the opportunity to create a major industrial, logistics and distribution hub, partly on re-designation of Green Belt land.
- Appendix 1 includes a number of proposed site allocations, these have not been reviewed in detail given the draft status of the plan.

Local Plan Review – Amendments to Volume 1 and 2

2.5.24 The Council are also proposing amendments to Volumes 1 and 2 of the 2015 Adopted Local Plan. Following review of the draft document produced for consultation in October 2017, none of the proposed policy amendments are of relevance.

2.6 Summary

2.6.1 This section of the study has reviewed existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study.

2.6.2 National planning policy highlights the need to promote the vitality and viability of town centres through a town centre first approach and a defined hierarchy of centres, which is supported in further detail in the London Plan. Applicants for main town centre uses are required to pass the sequential approach to site selection and provide a full assessment of the impact on the vitality and viability of protected centres. The Council's development plan follows the general trend of the most recent national policy guidance, identifying a hierarchy of centres and town centre first approach.

2.6.3 As required by this commission, policy recommendations on the basis of updates to the evidence base and national policy guidance is provided in Section 12.

3.0 Current & Emerging Trends

3.1 Introduction

3.1.1 In order to set out the wider context for the Study and inform our advice on the need for additional retail and leisure floorspace in the Borough of Hounslow, we provide an overview of prevailing retail and leisure trends below. Our overview draws on recognised retail and leisure data sources, including research by Experian, Global Data and Mintel.

3.2 Growth in Internet & Multichannel Retailing

3.2.1 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian identifies that at 2017 'special forms of trading' (which includes internet, mail order and market sales) comprised an estimated 15.7% of total UK retail sales, which compares to a market share of just 5.6% at 2006. Experian estimates that the value of non-store sales in the UK at 2017 was £60.3 billion. It estimates that special forms of trading will increase further to 18.2% of retail expenditure at 2021. Thereafter, it is anticipated that additional growth will be relatively limited, with special forms of trading claiming 20.9% of UK retail expenditure at 2035 (the last reporting year for which Experian provides a figure).

3.2.2 The growth in internet as a sales medium has been enabled by the increase in access to the internet by UK households, which the Office for National Statistics reports increased from 57% of households at 2006 to 89% in 2016. The proportion of households with access to the internet is expected to increase further over the coming years and the popularity of shopping online is also assisted by mobile phones and tablets with faster 4G network technology. The Office for National Statistics indicates that the proportion of adults accessing the internet using a mobile phone has increased by nearly double since 2011 (from 36% to 66%).

3.2.3 It is evident that improvements in technology and an increased confidence in the security of online payments have supported substantial increases in internet sales in recent years. In addition, the option of using the internet to 'click and collect' in-store at a dedicated counter, or at "pods" in supermarket car parks, is also increasing in popularity, with the service accounting for over 50% of John Lewis internet orders. Some retailers are also seeing benefits arising from the use of shops as 'showrooms' where shoppers can view and try goods before making purchases later in their home (multichannel retailing). More progressive retailers are also providing in-store Wi-Fi (which can be used to inform shoppers of promotions via their mobile phones) and technology points (which can allow shoppers to browse a wider product range than that carried in store). Accordingly, whilst new technology and the rise of internet shopping undoubtedly provides challenges the importance of 'click and collect' highlights that physical stores within town centres will still have a significant role in the multichannel shopping environment.

3.2.4 In addition, it is important to note that many purchases made online are actually sourced from the shelves of 'bricks and mortar' stores and thereby have the potential to support retail floorspace. This is acknowledged by Experian which now provides adjusted market share figures for special forms of trading in order to reflect purchases which are effected through stores. The adjusted allowance for special forms of trading equates to 3.4% for convenience goods at 2018, increasing to 4.2% at 2023 and to 4.8% at 2028 and 5.2% by 2034. For comparison goods, the adjusted allowance is 15.4% at 2018, increasing to 17.4% at 2023, 17.6% at 2028 and 17.9% at 2034.

3.3 Polarisation of Retailing

3.3.1 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail sector has experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and per capita convenience goods spending has actually reduced in recent years.

3.3.2 In recent years, shoppers have been increasingly prepared to travel in order to access a greater choice of shops and the type of leisure facilities which are more commonly available in larger towns and cities. As a consequence, larger town/city centres (with a regional or sub-regional role) have tended to perform relatively strongly, but a number of smaller towns (particularly those proximate to larger centres) have fared less well. The performance of many smaller towns has also been particularly impacted upon by the recession and the growth of internet shopping, which has resulted in many operators believing that they can achieve appropriate nationwide coverage with a smaller number of stores.

3.3.3 Many retailers are focusing their development programmes on the provision of large flagship stores in strategic locations. They are focused on a much smaller portfolio of stores to cover main markets and to complement online sales. New and emerging retailers frequently target no more than 50 stores in key locations and, as a consequence, this trend is having an impact on take-up levels in shopping centres. Indeed, many town centre schemes have been put on hold or scaled down in size, and with expenditure growth forecast being relatively low in the medium term, retailers are likely to remain cautious about store development.

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- 3.3.4 It is also evident that retailers are choosing to develop stores in the most cost effective/strategic locations, with out-of-centre retail parks/locations, with free car parking and lower rents, being particularly attractive locations. A number of traditional town centre retailers now operate out-of-centre formats, including Next (Next Home & Fashion), John Lewis (John Lewis At Home), TK Maxx (Homesense, TK Maxx) and the Arcadia Group (through its Outfit format which incorporates Topshop, Topman, Miss Selfridge). These retailers are sometimes prepared to close stores in smaller/medium sized centres in favour of representation on a retail park.
- 3.3.5 PwC reported (April 2018) that the number of high street stores opening fell to an average of 11 stores per day in 2017, compared from 12 per day in 2016 and 15 in 2013, whilst an average of 16 stores closed every day in 2017. The findings equate to an overall net loss of 1,772 stores disappearing from town centres in 2017. The research identified that beauty product stores, coffee shops, cafes and tearooms and ice cream parlours showed the highest increase in net store numbers in 2017, followed by booksellers and tobacconists (particularly vape stores) remaining popular. Whilst a continuing decline of banks, estate agent and travel agent units were recorded as consumers use online sources.
- 3.3.6 We also note the increasing preference of fast food operators to incorporate 'drive thru' restaurants, which has resulted in the closure of 'in centre' McDonald's restaurants in some centres. Furthermore, there have been a number of retailers that are currently restructuring (some involving a Company Voluntary Arrangement (CVA)) or have gone into administration in the last year including:
- M&S announcement that it will close 30 clothing and homes stores by 2021 (November 2016), with 14 due to close in 2018;
 - Debenhams announcement that 10 of its 176 UK stores will be closing, 2 of which already have (Farnborough and Eltham) (April 2017);
 - House of Fraser entering into administration albeit subsequently bought by Sports Direct. A number of store closures are expected (August 2018);
 - New Look's announcement of its intention to close 60 stores following a restructuring plan (March 2018);
 - Maplin entering into administration resulting in the closure of their 200+ stores (February 2018);
 - Toys R Us going into administration closing all of its 105 stores (February 2018);
 - Carpetright's announcement of its restructuring and closing some 81 of its 400 stores (April 2018);
 - Fenwick department store's announcement to "*modernise and reorganise the business*" which could potentially involve store closures (April 2018);
 - Mothercare has announced that it will close 50 of their 137 UK stores (May 2018); and

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- Poundworld announced it has appointed administrators putting around 5,100 jobs at risk (June 2018) with Iceland announcing they will take on 19 stores (August 2018); and
 - Office Outlet announced it will close 96 UK stores following the launch of a CVA (August 2018).

3.3.7 It is clearly evident that trading conditions for retailers are tough. Such closures/changes can result in particularly significant impacts at medium/smaller sized town centres, which tend to be the subject of higher vacancy rates, and which have also often suffered related reductions in rental levels and footfall in recent years. As a consequence, a greater proportion of comparison goods expenditure is being claimed by a smaller number of centres of sub-regional or regional importance.

3.3.8 However, such changes have also brought forward opportunities for different types of retailer. Some available units in town centres, including former BHS units, have been re-occupied by household discounters such as B&M Bargains, Poundland, Poundstretcher and Wilko. Whilst such lettings are valuable in bringing back premises into active use, many smaller centres are heavily reliant on such retailers, which generally operate at the lower end of the market.

3.3.9 In addition to national multiple retailers, independent traders, face pressure from both the internet and national multiple retailers. Such trader's success lie in them being able to offer a product/service not available elsewhere, or a service/shopping experience not offered by national multiple retailers.

3.3.10 It is evident that some centres are seeking to 'reinvent' themselves through an increased focus on quality independent and food and drink operators. Towns are also increasingly valuing their market as a means to differentiate themselves from retail parks and superstores, and many markets are looking to contemporary and speciality retailers to create interest and draw customers in. The greatest opportunities for successful vintage, craft and food and drink markets have so far been in centres served by affluent catchments.

3.3.11 The polarisation of retailing will result in larger more dominant centres continuing to attract key retailers, with medium/smaller sized town centres potentially struggling to attract investment. District/local centres should be less affected and are likely to retain their attraction for top-up/day-to-day shopping.

3.4 The End of the 'Big Four' Space Race and the Rise of the Discounter

3.4.1 Shoppers have turned away from food superstores in recent year and Mintel suggests that this decline is such that it cannot be considered a 'blip'. Mintel attributes the problems which face superstores to two principal factors.

3.4.2 Firstly, many young people are choosing to rent within or close to town and city centres. As a consequence, many undertake sporadic food shopping and often eat out, use takeaways, or buy instant meals. Accordingly, when young people undertake food shopping, they often have no greater need than that which can be serviced by a convenience store.

3.4.3 The second factor is the growth of discount operators, which have become more mainstream in both their offer and market positioning. Mintel suggests that the improvements in discounters' offer, such as wider ranges, better fresh foods and more premium foods, means that they have become an attractive alternative to both large food superstores and to convenience stores.

3.4.4 As a consequence, the 'big four' foodstore operators (Asda, Morrison's, Sainsbury's and Tesco) have become circumspect in respect of new store openings and, indeed, have closed a number of existing foodstores. All four have suffered significant declines in their market share over the past four or five years. As Figure 3.1 below indicates, Tesco has suffered a 1.9 percentage point reduction in its share of the food retail market between 2012 and 2018, and Morrison's has suffered a 1.4 percentage point reduction in market share. Considered together, the market share of the big four foodstore operators has declined from 59.6% in 2012 to 53.8% in 2018 (a reduction of 5.8 percentage points). In contrast, other retailers – most notably Aldi and Lidl – have benefitted from increases in their market share. Aldi's market share increased from 2.6% to 6.6% (equating to an increase of 4 percentage points) between 2012 and 2018.

Figure 3.1: Market Share of Key UK Food Retailers

Operator	2012	2013	2014	2015	2016	2017	2018
Tesco	23.9%	23.0%	23.3%	22.8%	22.6%	22.1%	22.0%
Sainsbury's	13.1%	12.9%	13.1%	12.8%	12.6%	12.2%	12.1%
Asda	13.3%	13.0%	13.0%	12.0%	11.3%	11.4%	11.3%
Morrison's	9.3%	8.9%	9.2%	8.6%	8.6%	8.3%	8.4%
Aldi	2.6%	3.3%	4.3%	4.8%	5.5%	6.0%	6.6%
Co-operative Food	5.4%	5.1%	5.2%	5.1%	4.9%	4.7%	4.7%
Waitrose	3.6%	3.7%	3.8%	4.0%	3.9%	3.9%	3.9%
Marks & Spencer	3.7%	3.7%	3.9%	4.0%	4.1%	4.1%	4.1%
Lidl	2.0%	2.0%	2.2%	2.5%	3.2%	3.2%	3.3%
Iceland	1.9%	1.9%	2.0%	2.0%	2.0%	2.0%	2.2%

Source: UK Food & Grocery Market, Global Data, February 2018

3.4.5 The current/recent strategy of the big four operators is twofold: (1) the development of smaller store formats for top-up food shopping; and (2) the reconfiguration and refurbishment of existing foodstores.

3.4.6 The development of smaller store formats (Sainsbury's Local, Tesco Express, Marks & Spencer Simply Food, and Little Waitrose) is in response to changing food shopping habits and the move from weekly shops to more frequent smaller shops. These smaller store formats are important in driving footfall in smaller district/town centres and in some cases act as a vital 'anchor store'.

3.4.7 In terms of the reconfiguration/refurbishment of existing foodstores, in some cases, product lines are being reduced and pricing is being made straightforward. Some operators are looking to introduce other uses to take existing floorspace and Sainsbury's acquisition of the Home Retail Group has allowed it to

introduce Argos (which it now owns) into its stores. Small concessions of Habitat are also currently being tested within a number of Sainsbury's.

- 3.4.8 Aldi and Lidl have both sought to take advantage of the structural changes in the food retail market and have announced ambitious store opening targets that will further increase pressure on the big four operators. Aldi has identified major expansion plans and intends to open 70 new UK stores in 2018, as part of its target to have more than 1,000 stores by 2022. Aldi's plans include three formats: standard stores of between 18,000 sq ft and 20,000 sq ft with a minimum of 70 parking spaces; the 'Small Aldi' format of between 10,000 sq ft and 14,000 sq ft with a minimum of 40 parking spaces; and, the 'City Aldi' format of between 7,000 sq ft to 10,000 sq ft with no parking spaces required. Aldi is understood to be considering all types of property, including development sites, mixed-use schemes, retail parks, high streets, shopping centres and roadside.
- 3.4.9 Lidl plans to expand to trade from a portfolio of 1,200 UK stores in the coming years. Lidl's future requirements reportedly comprise units of between 20,000 sq ft and 30,000 sq ft, with sites of 1.5 acres required for standalone units and up to 4 acres for mixed-use schemes.
- 3.4.10 Partly in response to an ever-increasing competitive grocery market, earlier this year (April 2018) Sainsbury's confirmed plans to merge with Asda. The merger will be subject to a review by the Competition and Markets Authority (CMA) which, if approved, would result in a new grocery market leader. Sainsbury's have announcement that they are keeping both the Sainsbury's and Asda fascia's and are not intending on closing any stores. Store closures may however be required as part of the CMA potential approval of the merger.

3.5 Leisure and Appetite for More Food and Drink

- 3.5.1 In recent years, town centres have also increasingly relied upon an expanding food and drink sector to bring some vacant units back into active use. Eating out has become increasingly popular and both national multiples and independents have benefitted from the additional expenditure which has resulted. Barclaycard data identifies that spending in restaurants in the first quarter of 2017 was up 12.2% year-on-year.
- 3.5.2 Local Data Company (LDC) reports that the number of food and drink outlets in town centres had gone up by 6,000 between 2011-2016 whilst the number of town centre bars, pubs and night clubs fell by about 2,000. The largest food and drink growth areas included lounge bars (116%), cake makers (51%), juice bars (46%) and coffee shops (31%). In September 2017, LDC reported the number of new food and beverage outlets opening in the UK reached a peak of around 743 new units per year. However, over recent months there is evidence that the food and drink market is becoming saturated with the likes of Byron Burger, Prezzo, Jaime's Italian and Chimichanga either restructuring, closing outlets, or going into administration.

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- 3.5.3 Food and drink operators now require units which are in amongst the retail heart of a centre. Food and drink operators (particularly national multiples) can be particularly attractive to landlords as long leases can often be agreed to due to the cost of fit-outs.
- 3.5.4 Mintel also reports that although the three biggest operators, Odeon, Vue and Cineworld, still dominate the cinema market and account for 60% of the total UK cinema screens, there has been a steep increase in the number of independent screens. Niche cinema operators, such as Everyman, Curzon and The Light, are considered to have the potential to be particularly complementary to shopping environments. Such cinemas have more modest land take requirements than large multiplexes, and therefore may have a greater chance of being incorporated in a mixed-use development. Mintel reports that the growth of 'event cinema' and diverse food and drink offerings provided by independents means cinema is becoming a destination for consumers who are not typical cinema fans.
- 3.5.5 The health and fitness sector has been buoyed by the popularity of budget gyms. Operators such as Pure Gym, The Gym Group and easyGym have an operational model which is based on low costs and high volume. Such gyms tend to have plenty of equipment in order to encourage users, but are characterised by basic fit-outs and limited staff. Many budget gym operators – including Pure Gym and The Gym Group – are actively seeking to bring forward additional facilities, with a wide range of properties (including old theatres, larger shop units and office space) having the potential to meet their needs. The Leisure Database Company suggests that there were around 300 budget gyms across the country in summer 2016, but that this figure has the potential to increase to around 1,000 by 2019. Pure Gym is now the private health and fitness club market leaders in terms of both venue numbers (160 clubs) and memberships. The Gym Group and Anytime Fitness now also both have over 100 clubs (May 2018), with Xercise4Less, currently located in Hounslow, having over 50 gyms.
- 3.5.6 There are a number of emerging leisure concepts which are also helping to anchor retail environments, including bowling alleys, trampolining and crazy golf. These concepts can assist centres in providing a point of difference with the competition, ensure that visitors' dwell times are increased, and assist a town's evening economy. Such concepts do however require reasonably large footprint units/space which primarily due to physical constraints, town centres are not always able to provide/offer.

3.6 Brexit

- 3.6.1 The referendum in June 2016 on the UK's membership of the European Union resulted in a majority vote to leave the EU. The terms of withdrawal are being negotiated with the Commission now that 'Article 50' has been formally triggered. A number of commentators forecast that uncertainty during this time will negatively impact upon consumer confidence and expenditure, and that investor decisions may be put on hold. This was compounded by the uncertainty resulting from the snap general election that was called by Theresa May.

3.6.2 Global Data published an analysis following the Autumn 2017 budget and its impact on retail, in which it acknowledges that the retail growth forecast is clouded by the lack of information on the government's policy on Brexit negotiations. Therefore, despite the referendum being over 2 years ago, there is still limited information and clarity on the changes arising from the UK's pending removal from the European Union. As such, there will be a need to monitor the impacts arising from the UK's exit from the EU and for any future update to this Study to take appropriate consideration of such changes.

3.7 Potential Impact of Trends on the Borough of Hounslow Town Centres

3.7.1 The town centres in the borough face a number of challenges, particularly from increasing competition from the internet, multichannel retailing, polarisation of retailing, and out-of-centre retail developments. These challenges will impact on the future strategy for the town centres.

3.7.2 It is important for the town centres to be able to respond to continued changes in the retail sector and to provide (or continue to provide) an offer/destination which distinguishes them from other competing metropolitan and international centres and out-of-centre retail destinations.

3.7.3 The continued growth of new out-of-centre/retail park formats represents a threat to the future vitality and viability of the boroughs town centres. In order to protect the vitality and viability of centres it is important therefore that the Council not only just control the expansion/change of use of out-of-centre development but also plan positively for town centre/edge-of-centre development opportunities, particularly in the case of Feltham Town Centre and emerging proposals within the WoB Local Plan Review.

3.7.4 Town Centre Strategies need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. Such strategies may seek to:

- (1) provide a good mix/variety of retail and leisure uses;
- (2) attract a mix of additional land uses, including residential and offices;
- (3) build on existing cultural/heritage/tourist attractions;
- (4) enhance existing town centre markets and speciality retailing;
- (5) provide a high quality shopping/leisure experience;
- (6) ensure an appropriate supply of hotel rooms in the right locations to encourage tourist and business stays;
- (7) provide convenient, affordable and accessible town centre parking;
- (8) promote and encourage events in the town centre;
- (9) embrace, and not compete against, multi-channel retailing; and
- (10) be responsive to changes in technology (the 'digital high street').

3.7.5 The key purpose of Town Centre Strategies should be to seek to build on the existing individuality of centres and extend the 'dwell time' and spend of visitors/residents visiting the town centre and in turn the vitality and viability of the centre.

4.0 Original Market Research

4.1 Introduction

4.1.1 This study is informed by two key areas of original market research. The key areas being:

- A Household Telephone Survey; and
- Engagement with identified key stakeholders.

4.1.2 Each of the key areas of market research are summarised in turn below.

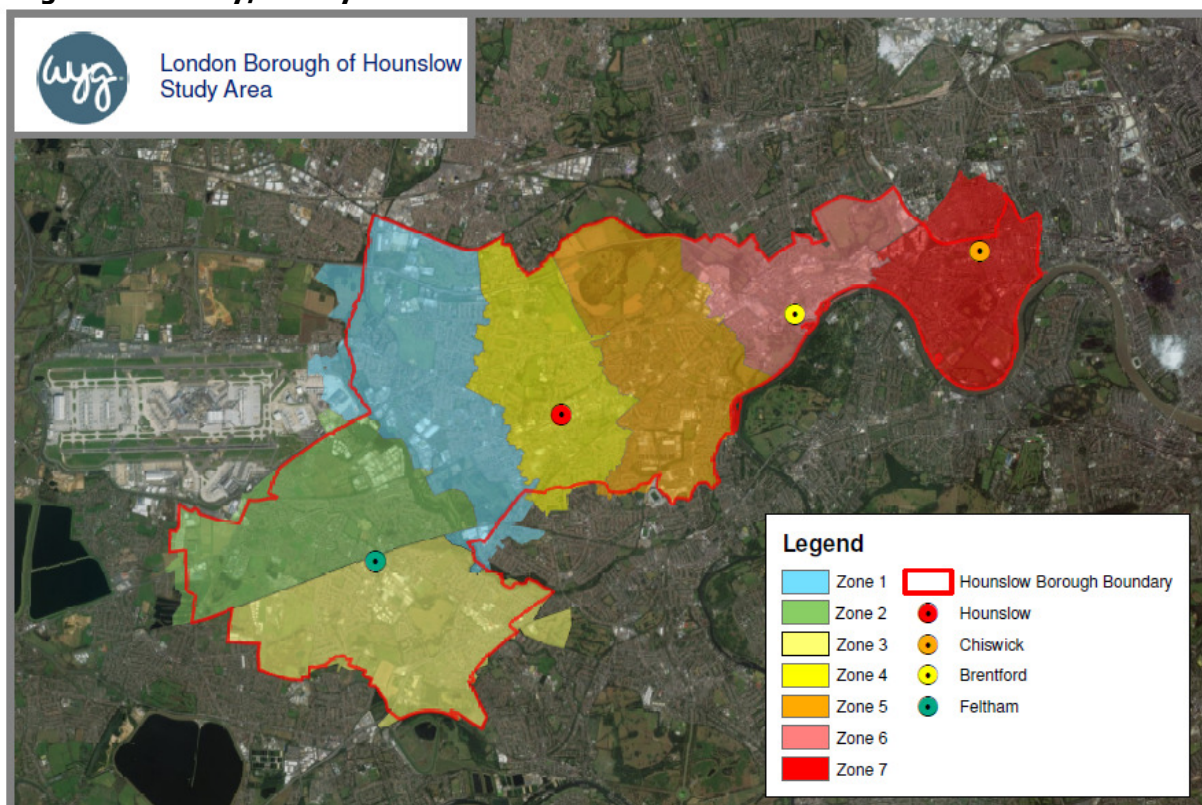
4.2 Telephone Household Survey

4.2.1 A key requirement of this study is the detailed understanding of retail shopping patterns in terms of the use of the town centres and the identification of centre catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify shopping habits and preferences in the Study Area.

4.2.2 The undertaking of a household telephone survey enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail needs across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.

4.2.3 The household survey involved 700 households across a defined Study Area which comprises 7 separate zones. The Study Area, as shown in Figure 4.1 below.

Figure 4.1: Study/Survey Area



4.2.4 The adopted study area zones are largely the same as those adopted in the previous 2013 Retail Needs Study undertaken on behalf of the Council (Zones 11-17 of the West London Retail Needs Study 2010). However, these zones did not cover the entire boundary of the borough so have been extended manually in this study. Utilisation of broadly the same zones enables comparison of any changes in shopping patterns since 2013 across the borough.

4.2.5 Figure 4.2 below details the postcode sectors which make up the survey zones. Zone 1 comprises the west of the London Borough of Hounslow, Zone 2, the south west, Zone 3 Feltham and includes the District Centre of Feltham, Zone 4 covers Hounslow and Hounslow Metropolitan Centre, Zone 5 covers east Hounslow, Zone 6 covers Brentford and includes Brentford District Centre and Zone 7 is at the east of the borough and covers Chiswick including Chiswick Major Centre.

Figure 4.2 Postcodes by Survey Area

Survey Zone	Postcode Sector
Zone 1 – West Hounslow	TW4 5, TW4 6, TW4 7, TW5 9, Part UB2 5
Zone 2 – South West Hounslow	TW14 0, TW14 8, TW14 9
Zone 3 – Feltham	TW13 4, TW13 5, TW13 6, TW13 7, Part TW12 3
Zone 4 – Hounslow	TW3 1, TW3 2, TW3 3, TW3 4, TW5 0, Part UB2 5
Zone 5 – East Hounslow	TW7 4, TW7 5, TW7 6, TW7 7, Part TW1 1, UB2 4,
Zone 6 – Brentford	TW8 0, TW8 8, TW8 9, Part W5 4, W3 8
Zone 7 - Chiswick	W4 1, W4 2, W4 3, W4 4, W4 5

4.2.6 The questions and full tabulation of results from the household survey are provided at **Appendix A**.

4.2.7 The results of the household survey, *inter alia*, are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7 of this Study.

4.3 Stakeholder Engagement

4.3.1 In order to inform the qualitative retail needs assessment, as part of this commission, we contacted key stakeholders comprising businesses stakeholders and local Resident Associations, as requested by the Council.

4.3.2 The objective of the stakeholder engagement with the key stakeholders is to assist establishing:

- views on any strengths, weaknesses, opportunities, threats in centres/retail and leisure provision; and
- suggested improvements to the town centres.

4.3.3 Each of the stakeholders were contacted via email with follow up calls as necessary. A summary of the 'key feedback' from each stakeholder is provided at **Appendix B**.

5.0 Socio Demographic and Sub-Regional Context

5.1 Introduction

5.1.1 In order to provide some context, this section provides an overview of the socio demographic context of the London Borough of Hounslow and sets out the sub-regional centre hierarchy.

5.2 Socio Demographic Context

5.2.1 A population profiling exercise has been undertaken utilising the Experian Mosaic database to establish the socio demographic profile of the administrative area of the Borough of Hounslow. A national UK average is also provided so as to enable a comparative assessment to be undertaken. The breakdown and definition of each Experian Mosaic group is provided at **Appendix C**.

Figure 5.1 – Experian Mosaic Profiling (%)

Mosaic Group	London Borough of Hounslow	UK Average
Population (Adults 18+)	204,271	-
A: City Prosperity	17.4	4.1
B: Prestige Positions	0.6	7.2
C: Country Living	0	6.8
D: Rural Reality	0	6.8
E: Senior Security	0.6	8.0
F: Suburban Stability	0.2	5.9
G: Domestic Success	5.4	8.3
H: Aspiring Homemakers	2.7	9.1
I: Family Basics	4.6	7.2
J: Transient Renters	0.1	5.6
K: Municipal Challenge	9.7	5.8
L: Vintage Value	1.4	6.1
M: Modest Traditions	0.1	4.6
N: Urban Cohesion	41.8	4.9
O: Rental Hubs	14.7	7.7
U: Unclassified	0.8	1.4
Total	100	100

Source: Experian Mosaic Report, May 2018

Notes: Population derived from Mosaic report – 2016 estimate Adults 18+

5.2.2 The Experian Mosaic results highlight that when compared to the UK average the Borough of Hounslow contains:

- a significantly higher proportion of residents within 'Urban Cohesion' and 'City Prosperity' (41.8% to 4.9% and 17.4% to 4.1% respectively). The 'Urban Cohesion' category (established older households owning city homes in diverse neighbourhoods/ thriving families with good incomes in multi-cultural communities/ larger extended families with strong South Asian traditions/ older residents owning small inner suburban properties) and 'City Prosperity' category (global high flyers/ high status households in elegant inner suburb houses/ city suits renting premium priced flats in central locations/ ambitious 20-30 renting expensive apartments in highly commutable areas) are perhaps unsurprisingly higher given the urban nature of much of the borough;
- a smaller proportion of residents within the 'Prestige Positions' (0.6% compared to 7.2%) category (influential families with substantial income/ retired residents in sizeable homes/ high-achieving families living fast track lives/ well-off families in upmarket suburban homes/ mature couples in comfortable detached houses) and a significantly smaller proportion, within 'Senior Security' (0.59% compared to 8.0%) category (elderly in affordable/comfortable/standard homes);
- a smaller proportion of residents within the 'Suburban Stability' (0.3% compared to 5.9%) category (couples with mid-range incomes/pre-retirement couples with respectable incomes/single mature in intermediate occupations/active families with teens/adult children);
- a lower proportion of 'Family Basics' (4.6% compared to 7.2%) category (stable families renting from social landlords/families where expenditure can exceed income/ younger families with budget home/families living in areas of high deprivation) and also 'Transient Renters' (primarily younger population in low cost/social accommodation) category (0.1% compared to UK average of 5.6%);
- a higher proportion of 'Rental Hubs' (14.7% compared to 7.7%) category (20-30 something career builders/ entertainment seeking youngsters/ self-starting young renters/ inhabitants of university fringe/ students in high density accommodation close to universities) and also within 'Municipal Challenge' (9.6% compared to UK average 5.8%) category (long term renters/older social renters/hard-pressed singles/multi-cultural household of social/low cost flats);
- a slightly lower proportion within 'Domestic Success' (5.4% compared to 8.3%) category (affluent families in upmarket housing, well qualified singles, families in modern detached homes/traditional mid-range suburbs) and has a lower proportion (1.4% to 6.1%) with the 'Vintage Value' category (ageing/elderly in social/low value homes/retirement homes); and
- due to the urban nature of the borough there are no residents in the 'Country Living' or the 'Rural Reality' category.

5.2.3 The Mosaic results generally highlight that, when compared to the UK average, the Borough of Hounslow has a higher proportion of residents within the urban and city inhabitants Experian Mosaic categories albeit these range from being high to low grades. It also highlights that the area contains a higher proportion of renters and slightly lower proportion of aspiring young families/singles.

5.3 The Centre Hierarchy

5.3.1 The London Borough of Hounslow is an outer borough located to the west of Central London. It is bound by the London Borough of Richmond to the south east, Ealing to the north, Hammersmith to the west and Hillingdon to the north west, with Spelthorne District to the west.

5.3.2 The London Plan hierarchy identifies the centres in Hounslow as follows:

- Metropolitan Centre: Hounslow
- Major Centre: Chiswick
- District Centres: Brentford and Feltham

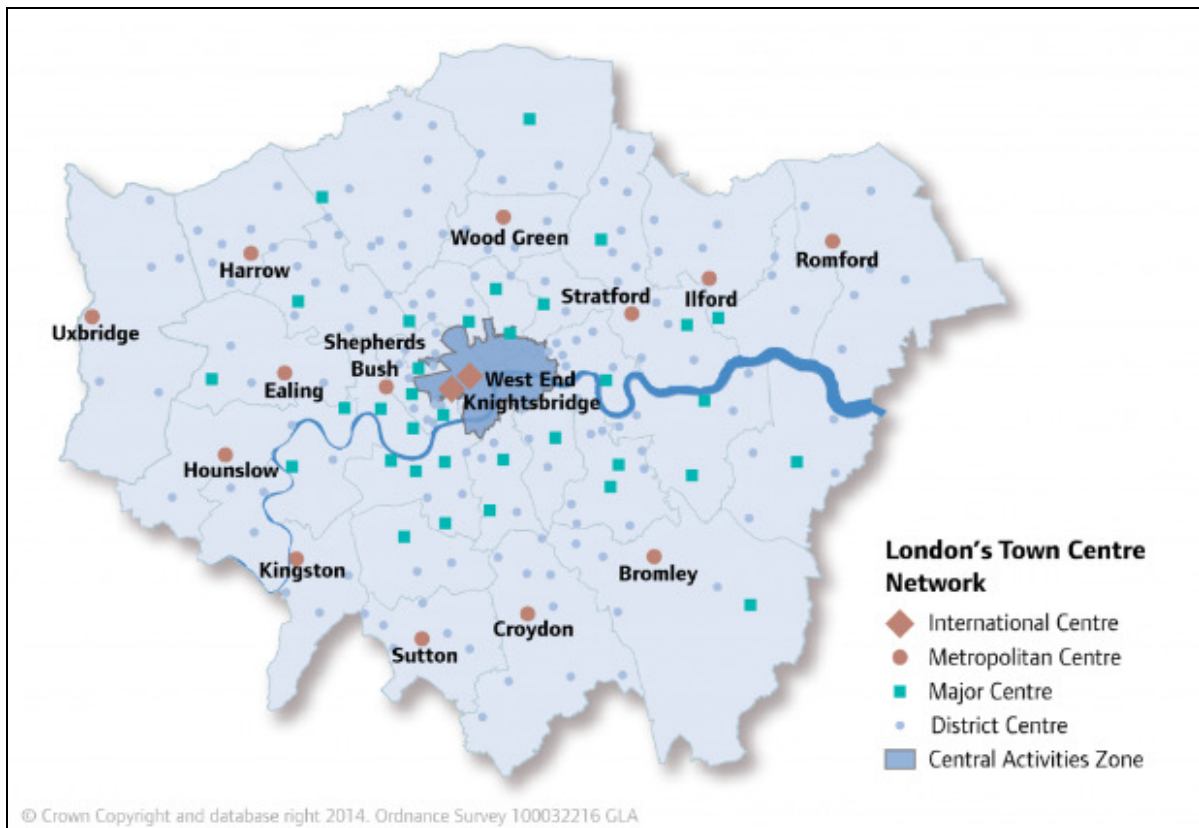
5.3.3 The above centres are supported by a further seven large neighbourhood centres and 36 small neighbourhood centres as identified in the Adopted Local Plan.

5.3.4 The town centres within the Borough compete with the following major shopping destinations outside of the study area including:

- Central London;
- Kingston;
- Ealing; and
- Westfield.

5.3.5 Figure 5.2 shows London's Town Centre Network as provided within the London Plan and shows Hounslow as a Metropolitan Centre to the west of London, alongside Ealing and Kingston.

Figure 5.2: London Plan Town Centre Network Extract



Source: Extract of Map 2.6 from the London Plan

5.3.6 Figure 5.3 illustrates the position of the principal centres within the hierarchy of centres based on the Venuescore's UK Shopping Venue Rankings. The index ranks over 3,000 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples. The rankings in the table represent the position of the centres at the time of the most recent Rankings as well as competing surrounding centres. A more detailed tabulation of retail rankings data is also provided which shows the historic performance of the centres in the preceding 2013-14 Rankings.

Figure 5.3: Sub-regional Centre Rankings

Centre	Classification	2013 Rank	2016 Rank	Change in Rank 2010-2016
London, Oxford Street	Major City	6	10	-4
Kingston Upon Thames	Major City	16	18	-2
London Westfield Stratford	Major Regional	22	26	-4
Richmond	Regional	120	97	+23
Ealing	Regional	132	127	+5
Chiswick	Regional	176	174	+2
Hounslow	Sub Regional	180	181	-1
Ashford	Sub Regional	188	205	-17
Walton-on-Thames	Sub Regional	238	263	-25
Feltham	Sub Regional	353	343	+10
Twickenham	Sub Regional	427	363	+64
Shepherds Bush	Major District	433	382	+51

Source: VenueScore 2013-14 and 2016-17 Rankings

5.3.7 Figure 5.3 shows that Chiswick is identified as a Regional Centre with its rankings improving slightly since 2013. Hounslow is identified as a Sub Regional Centre and its ranking has remained broadly the same over the period 2013 to 2016. Feltham is identified as a Sub Regional Centre and has improved its position by 10 points since 2013. Due to the limited presence of national multiple retailers Brentford is not presently included within the rankings. Whilst the centres within the London Borough of Hounslow have remained relatively stable, other similar sized surrounding centres have generally improved their rankings (Twickenham, Shepherds Bush and Richmond). Oxford Street, London and Westfield Stratford, have both dropped slightly since 2013, with Oxford Street just remaining ranking in the top 10 VenueScore Rankings.

5.3.8 As noted earlier the Rankings are reflective of the presence of national multiple retailers in a particular centre and are therefore a more accurate barometer of the performance of larger centres.

5.4 Summary

5.4.1 This section of the Study identifies that the socio-demographic profile of the borough contains a high proportion of residents classified as Urban Cohesion, summarised as "*established older households owning city homes in diverse neighbourhoods/thriving facilities with good incomes in multi-cultural urban communities/large extended families in neighbourhoods with strong South Asian tradition/older residents owning small inner suburban properties with good access to amenities*" and City Prosperity, summarised as "*global high flyers and families or privilege living luxurious lifestyles in London's most exclusive Boroughs/high status households owning elegant homes in accessible inner suburbs where they enjoy life in comfort/city suits renting premium-priced flats in prestige central locations where they work and play hard/ambitious 20 and 30-somethings renting expensive apartments in highly commutable areas of major cities.*"

5.4.2 In terms of the shopping hierarchy, Hounslow is identified as a Metropolitan Centre within the London Plan, Chiswick a Major Centre and Brentford and Feltham District Centres. Turning to the sub-regional centre hierarchy, Hounslow retains its UK ranking and has only dropped 1 point since 2013. Chiswick is classified as a Regional Centre, similar to Ealing and Richmond, and has seen an increase of 2 points since 2013. However, other similarly sized centres have improved their rankings over the same period. Feltham is at a lower rank and has seen the greatest improvement and increased its ranking by 10 points since 2013. However, other centres of the same classification have seen greater improvements over the same period. Brentford is not presently included within the rankings.

6.0 Existing Retail Provision & Shopping Patterns

6.1 Introduction

6.1.1 This section of the study provides a summary of the existing retail facilities within the Borough and the shopping patterns emerging from the household survey. It includes commentary on the market share for both convenience and comparison goods.

6.2 Existing Retail Provision

6.2.1 This section provides a summary of the existing retail provision in the four town centres and surrounding area within the Borough of Hounslow.

Centres

6.2.2 Hounslow (a Metropolitan Centre), Chiswick (a Major Centre), and Brentford and Feltham (District Centres) are the four main town centres within the Borough identified in Policy TC1. The centres are supported by seven large neighbourhood centres in Hounslow West, Bedfont, Isleworth, Cranford, Hanworth, Heston and Old Isleworth, and 36 small neighbourhood centres.

6.2.3 As noted in section 5, Hounslow is classified as a Metropolitan Centre within the London Plan and Hounslow Local Plan. The new emerging London Plan notes Metropolitan Centres typically have high order comparison retail, department stores, large shopping malls alongside larger offices and sub-regional culture and leisure offering. Hounslow Town Centre contains the largest retail offer, with a mix of retail and leisure uses providing some 96,720sq m gross of retail and leisure floorspace. Of this floorspace, 18,370sq m is devoted to convenience retail floorspace, 41,460sq m to comparison goods, 3,950sq m for retail service uses (including hair and beauty salons, opticians and dry cleaners), 21,120sq m of leisure services (including cafes, restaurants, public houses and hotels) and 7,470sq m of financial and business floorspace (banks/financial advisors/solicitors/estate agents). In addition, the town centre also contains a range of other uses including offices, religious establishments, emergency services and residential uses. These uses attract people to the town centre for reasons other than purely shopping and/or leisure.

6.2.4 Hounslow Town Centre is currently undergoing a major redevelopment to the north of high street and south of the Blenheim Centre. The Hounslow High Street Quarter redevelopment scheme commenced in January 2018. The scheme includes around 500 residential units, multi-screen cinema, around 11,199sq m of commercial retail units, car parking and associated landscaping.

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- 6.2.5 Chiswick Town Centre is situated in the eastern part of the Borough and is the second largest centre. Chiswick contains some 56,200sq m of retail and leisure floorspace in total, the largest proportion of which is comparison goods at 18,620sq m, followed by 13,700sq m for leisure services, 11,340sq m for convenience goods, 6,170sq m floorspace for retail services and 5,050sq m floorspace for financial and business services. The centre also contains a number of offices, medical services, educational establishments and residential uses.
- 6.2.6 Brentford Town Centre is located to the east of Hounslow and west of Chiswick and is close to the borough boundary. The centre is the smallest of the four and contains some 30,090sq m floorspace of retail and leisure uses. Leisure services make up the largest proportion of this at 9,190sq m. Financial and business services occupy some 7,870sq m floorspace, followed by 4,680sq m of convenience goods floorspace. Comparison goods occupy around 3,710sq m of the total floorspace alongside 3,430sq m for retail services. Alongside these uses, the centre also contains a number of offices, a Youth Hub and community centre, medical services and some residential uses.
- 6.2.7 Feltham Town Centre is located to the west of the borough and contains some 32,980sq m floorspace. The majority of this floorspace is occupied by convenience goods (14,690sq m floorspace) and comparison goods retail occupies some 11,160sq m floorspace. The centre also contains around 3,110sq m floorspace of leisure services, 2,130sq m floorspace for financial and business services and 1,820sq m floorspace of retail services. There are also offices, educational establishments and a health centre.
- 6.2.8 Feltham Town Centre is also identified for regeneration and redevelopment opportunities in the emerging West of Borough Local Plan Review which includes around 4,000sq m new retail floorspace as part of the Station Quarter redevelopment and promotion of mixed-use developments with shops/retail use at ground floor level through redevelopment and intensification of existing sites.
- 6.2.9 The retail and leisure composition and floorspace breakdown for the towns is summarised in Figure 6.1 below.

Figure 6.1: Retail Composition – Floorspace Figures

	Hounslow	Chiswick	Brentford	Feltham
	Floorspace (sq m)			
Convenience	18,370	11,340	4,680	14,690
Comparison	41,460	18,620	3,710	11,160
Retail Service	3,950	6,170	3,430	1,820
Leisure Service	21,120	13,700	9,190	3,110
Financial and Business Service	7,470	5,050	7,820	2,130
Vacant	4,350	1,320	1,210	70
Total	96,720	56,200	30,090	32,980

Source: 2018 Experian Goad Survey.

Out-of-Centre Retail Provision

6.2.10 In terms of out-of-centre retail provision there are a number of retail parks and standalone facilities in the Borough. Figure 6.2 below provides details of the main retail parks and stores.

Figure 6.2: Main Out-of-Centre Retail Parks/Facilities in the Borough

Facilities	Key Occupiers
Hounslow	
Hospital Road	Halfords, Home Bargains
Ivybridge Retail Park, Isleworth	TK Maxx, Halfords, Sports Direct, Currys PC World, Asda.
Chiswick	
Gunnersbury Avenue	B&Q
Brentford	
971 Great West Road	Carpetright and DFS
West Cross Industrial Park	Currys PC World incl. Carphone Warehouse
Syon Lane	Homebase
London Road	Pets at Home, Majestic Wine
Phoenix Park, Ealing Road	Topps Tiles, Screwfix
Syon Park	Wyevale Garden Centre
Feltham	
Leisure West, Air Park Way	Cineworld, Pizza Hut, Burger King, Gala Bingo, Frankie and Benny's, Chiquito and Megabowl.
Apex Retail Park, Hampton Road West	Wickes and Currys PC World
Manor Park	Carpetright, Topps Tiles, Pets at Home
Questram House	Howdens
Snakey Lane	Adrian Hall Garden Centre

Source: WYG Surveys, May 2018

6.2.11 Turning to out-of-centre foodstore provision, the following larger foodstores are located in the borough:

Hounslow

- Aldi, Hospital Road - 1,156sq m gross floorspace
- Iceland, Bath Road - 903sq m gross floorspace

Brentford

- Tesco Extra, Syon Lane - 11,754sq m gross floorspace

Feltham

- Tesco, Dukes Green Avenue - 7,772sq m gross floorspace

Other

- Tesco Extra, Mogden Lane - 8,317sq m gross floorspace
- Tesco Extra, Bullbridge Industrial Estate - 7,375sq m gross floorspace
- Asda, Ivybridge Retail Park - 1,998sq m gross floorspace

6.3 Surrounding Main Large Centres

6.3.1 The town centres within the borough do not operate in isolation, particularly given the nature of the area in outer London. It is important to understand the nature of the existing and emerging retail offer in surrounding 'competing' centres given that planned improvements could potentially materially impact upon shopping patterns, future performance and overall vitality and viability of the centres.

6.3.2 The surrounding centres which the household survey shows have an influence on shopping patterns in the borough are: Twickenham, Staines, Kingston-Upon-Thames, Ealing and Westfield Shepherd's Bush.

Twickenham

6.3.3 Twickenham is located adjacent to the Borough of Hounslow and is some 3 miles south of Hounslow Town Centre. Twickenham is defined as a 'district' centre in the London Plan's network of town centres and identified as a Main District Centre within the London Borough of Richmond-Upon-Thames' emerging Local Plan (publication version February 2017).

6.3.4 The latest Retail Study is the Richmond Retail Study 2014 Update prepared by Nathaniel Lichfield and Partners. The study identifies that Twickenham town centre has 276 retail units, of which around 5,910sq m is convenience goods floorspace and 12,510sq m is comparison goods floorspace. The study identifies it has a lower than average proportion of convenience goods units and a higher than average proportion of A3/A5 units.

6.3.5 In terms of future growth, the Retail Study identifies there is capacity for around 3,181sq m retail and leisure floorspace over the period to 2024. The Twickenham Area Action Plan (AAP) (July 2013) identifies a number of opportunity areas where further retail facilities could be accommodated, including the

Telephone Exchange Garfield Road (Site TW5) which is identified to potentially include an indoor market/niche retail/cinema with residential above and the Police Station (TW6) which is identified for a mix of town centre uses, with an active frontage onto London Road and residential to the rear, subject to successful relocation of the station. As far as we are aware, the above sites have not been redeveloped.

Richmond

- 6.3.6 Richmond is also situated within the London Borough of Richmond-Upon-Thames and is located approximately 4 miles to the east of Hounslow Town Centre. It is identified as the main shopping and commercial centre within the Borough and designated as a Major Town Centre within the Core Strategy (2009).
- 6.3.7 The Retail Study identifies that Richmond Town Centre contains 372 units. Around 6,350sq m net floorspace is used for convenience goods and 36,860sq m net floorspace is occupied by comparison goods retailers. The town has a higher than UK average proportion of comparison goods units at 41% compared to 36% and a lower number of convenience goods units (5.9% compared to 8.1%). The study noted that Richmond provides an excellent choice and range of clothing/footwear shops and jewellers and many of these outlets are upmarket or upper-middle market. In terms of future demand, the study identified a requirement for around 9,903sq m additional retail and leisure floorspace to 2024.

Staines-Upon-Thames

- 6.3.8 Staines-Upon-Thames is the principal town centre in Spelthorne Borough Council and is situated approximately 6 miles to the west of Feltham Town Centre. The shopping centre is focussed on the High Street, the Elmsleigh Centre and the Two Rivers Centre.
- 6.3.9 The latest retail study (Spelthorne Retail and Town Centre Study Update – March 2018) prepared by the Council identifies that Staines Town Centre has around 88,000sq m retail floorspace. The study acknowledges that the town centre is relatively compact and a significant proportion is pedestrianised with limited new development taking place. However, a new Premier Inn hotel has recently opened on the High Street which also provides 1,435sq m of retail floor space at ground floor level and planning permission (reference. 17/01007/FUL) has recently been granted for the redevelopment of the Waitrose store into three separate stores. The study acknowledges that the potential loss of this foodstore within the centre results in the potential for reduced visits/footfall in the centre, with the only central foodstore currently being Marks and Spencer. A new Primark store has recently opened in the former BHS unit within the Elmsleigh Centre.
- 6.3.10 In terms of out of centre floorspace, the majority of this is provided by the two Tesco superstores in Ashford and Sunbury.

Kingston-upon-Thames

- 6.3.11 Kingston-Upon-Thames Town Centre lies approximately 5.6 miles to the south of Hounslow Town Centre. The town is also identified as a Metropolitan Centre within the London Plan and is located within the Royal Borough of Kingston-Upon-Thames.
- 6.3.12 The Retail Study Update 2013 prepared by GVA identified that Kingston Town Centre provides 209,567sq m net retail floorspace in 545 units, dominated by a strong comparison goods offer which comprises almost 80% of the total retail floorspace. The study highlights that the town centre had a lower than national average representation of convenience and service units, including food and drink offering, and is lower than would be expected in a Metropolitan centre. The study states that the comparison goods retail provision comprises around 164,739sq m net and is predominately located within The Bentall Centre, Eden Walk, Clarence Street and the Historic Core.
- 6.3.13 Kingstown Town Centre is also supported by out of centre retail facilities to the east including Asda at London Road and Kingston Retail Park (Homebase, Carpetright, Furniture Village, Dreams and Matalan). A Sainsbury's foodstore is also located at Sury Basin directly to the north of the town centre.

Ealing

- 6.3.14 Ealing is the principal focus for shopping within London Borough of Ealing. It is located approximately 3 miles to the north of Brentford. The town centre is identified as a Metropolitan Centre within the London Plan, it consists of Ealing Broadway at the eastern end of the Uxbridge Road and West Ealing towards the western end and operate as two distinct shopping areas, separated by a range of other key town centre uses along Uxbridge Road.
- 6.3.15 The latest Ealing Town Centre Retail and Leisure Study prepared by GVA and published in April 2017 identifies that the centre has 344 retail/leisure units, with around 76,775sq m of retail floorspace. The centre contains a higher than UK average comparison goods floorspace. We are aware of the recent redevelopment of Dickens Yard which includes up to 10,000sq m flexible A1, A3, A4, D1 and D2 floorspace and the former Empire cinema for up to 4,934sq m mixed commercial floorspace (Classes A1/A2/A3/A4/D2), multi-screen cinema of up to 2,503sq m, incorporating up to 900sq m of other Class D2 leisure space and up to 161 residential units.

Westfield

- 6.3.16 Westfield Shepherd's Bush is located within the White City Opportunity Area in the Hammersmith and Fulham Borough. The shopping centre initially opened in September 2008 and has recently benefited from a 68,700sq m extension bringing the total size of the shopping centre to around 241,500sq m.

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- 6.3.17 Westfield contains over 400 stores including major retailers John Lewis, House of Fraser, M&S, Debenhams, Primark, H&M alongside over 35 luxury stores including Prada, Louis Vuitton and Jimmy Choo. It also offers over 50 high to mid quality food and drink outlets and a multiplex cinema operated by Vue.

6.4 Retail Patterns and Market Share Analysis

- 6.4.1 This section contains a summary of the convenience and comparison goods shopping patterns within the study area. Both main food and top-up convenience goods shopping patterns are analysed and for comparison goods - combined comparison goods, bulky comparison goods and non-bulky comparison goods shopping patterns (excluding clothing and footwear) are examined separately. In addition, an analysis of the shopping patterns within each town associated with clothing and footwear purchases is also undertaken. A detailed breakdown of the comparison and convenience goods shopping patterns is shown within the market share tables at **Appendix F & G**.

Convenience Goods Shopping Patterns

Main Food Shopping

- 6.4.2 The survey responses identify that respondents in Zone 1 primarily undertake their main food shopping in Hounslow (38%). Of these, the majority (23%) is captured by the town centre stores, with edge/out-of-centre stores capturing 15%. Feltham edge/out of centre stores capture 13% of shopping trips from Zone 1, whilst 25% of trips are undertaken at other stores in the Borough, the majority being at Tesco Extra Bullsbridge Industrial Estate. Only 7% of trips are made outside of the Borough and 10% are via the internet (home delivery).
- 6.4.3 For Zone 2, Feltham attracts the vast majority of the market share of main food shopping trips (89%), with 39% of trips undertaken at town centre stores and 49% at edge/out of centre stores, primarily the Tesco store at Dukes Green Avenue. The remainder are generally undertaken outside of the Borough (7%) or online via the internet (7%).
- 6.4.4 Feltham also attracts over half of main food shopping trips (64%) from its southern zone (Zone 3). Of these, 55% at stores within the town centre and 9% at edge/out of centre stores. Other main food shopping trips from residents in Zone 3 are undertaken outside of the Borough (25%), other stores in the Borough (7%) and the internet (3%). Similar to Zones 1 and 2, all of the online main food shopping purchases for Zone 3 were received via home delivery. The trips made to facilities outside of the study area are predominantly to either Sainsbury's St Clare's, Uxbridge Road (10%) or Tesco Extra, Escot Road, Sunbury-on-Thames.

Figure 6.3: Principal Main Food Shopping Patterns (%)

	Zones						
	West Hounslow	South West Hounslow	Feltham	Hounslow	East Hounslow	Brentford	Chiswick
	1	2	3	4	5	6	7
Hounslow	38	0	0	36	19	1	0
Hounslow Town Centre	23	0	0	32	17	1	0
Hounslow Edge/Out of Centre	15	0	0	4	2	0	0
Chiswick	0	1	0	0	4	5	55
Chiswick Town Centre	0	1	0	0	4	5	55
Chiswick Edge/Out of Centre	0	0	0	0	0	0	0
Brentford	6	0	0	22	40	71	6
Brentford Town Centre	2	0	0	1	1	39	0
Brentford Edge/Out Centre	4	0	0	21	39	32	6
Feltham	14	89	64	6	1	1	0
Feltham Town Centre	1	39	55	1	0	1	0
Feltham Edge/Out of Centre	13	49	9	5	1	0	0
Other inside Study Area	25	1	7	18	26	3	1
Outside Study Area	7	7	25	11	4	16	26
Internet/Delivery	10	4	3	6	6	1	12

Source: Derived from NEMS Household Survey Results (May 2018)

Notes: Figures may not add due to rounding

- 6.4.5 Despite Hounslow being the principal town in Zone 4 it retains less than half (36%) of main food shopping trips, of these trips most are at town centre stores. The remainder of the trips are undertaken at Brentford (22%) or other stores in the Borough, including Tesco Extra at Mogden Lane and Bullsbridge Industrial Estate. Stores outside of the borough attract around 11% of Zone 4's residents main food shopping trips, with 6% undertaken in Feltham and 6% online via home delivery.
- 6.4.6 Brentford is the most popular destination for main food shopping trips for residents in Zone 5, with around 40% of trips undertaken there, although the vast majority (39%) are at the out of centre Tesco Extra Syon Lane. Around 19% of trips are undertaken in Hounslow, with the remainder predominantly undertaken at other stores in the Borough (26%). Only 4% of trips take place at facilities outside of the Borough. Online shopping via the internet with home delivery accounts for 6%. Similar to Zone 5, Brentford attracts the majority of Zone 6 residents trips for main food shopping (71%), which is perhaps unsurprising given it is the principal town within Zone 6. 16% of shopping trips from Zone 6 take place outside of the Borough, whilst the internet captures 1%.
- 6.4.7 For Zone 7, respondents largely undertook their main food shopping within Chiswick (55%), the principal town within the zone. However, over a quarter of residents (26%) travel outside of the Borough for main food shopping trips. These trips were split via a number of different stores. Residents in Zone 7 had the

highest usage of the internet for main food shopping at 12%, with all of these being delivered to home (not click and collect).

- 6.4.8 The 2013 Joint Retail Study Update did not involve an updated household survey and therefore no shopping patterns were reviewed. The 2010 Joint Retail Study identified that Hounslow retained around 40% of shopping trips from its main zone (Zone 4, previously Zone 14), this has fallen slightly to around 36%. For Chiswick, the 2010 Study reported that it retained a significant proportion (80%) of the main food shopping trips from Zone 7 (previously Zone 17), whereas now it currently retains a smaller proportion at around 55%. For Feltham, the results are fairly similar, with 64% of Zone 3 residents undertaking main food shopping trips in Feltham currently compared to 62% in 2010. Brentford has significantly improved its market share of main food shopping trips from residents in its principal zone (Zone 6), previously Zone 16, with 71% of trips being attracted to the town currently compared to 38% in 2010. However, it is worthwhile noting that the 2010 Study did not differentiate between or split main food and top-up shopping trips within convenience goods.

Top-Up Shopping

- 6.4.9 Figure 6.4 identifies that Hounslow retains the majority (54%) of top-up shopping trips from Zone 1, with 31% captured by town centre stores and 23% captured by edge/out-of-centre stores. Other stores in the Borough capture around 29% of top-up shopping trips, with these trips split across a number of different stores. Feltham and Brentford attract around 4% and 3% of trips respectively with a further 4% undertaken outside of the Borough and 5% online via the internet.
- 6.4.10 For Zone 2, Feltham attracts 77% of top-up shopping trips, 32% of which are captured by the town centre stores and 45% by edge/out of centre stores. This is unsurprising given Feltham is the closest centre to the zone. The remainder of trips are generally undertaken at other stores in the Borough (11%), most notably Tesco Express at Staines Road, and stores outside of the Borough (9%). Unsurprisingly the internet only accounts for 1% of top up purchases from Zone 2.
- 6.4.11 Feltham retains the majority of shopping trips from its zone (Zone 3) (51%), with 43% of these trips taking place at stores within the town centre. Stores located outside of the study area account for 24% of top-up shopping trips, with the majority of these (15%) undertaken at Sainsbury's St Clares, Uxbridge Road. A further 20% of trips are undertaken at other stores within the Borough and 1% are online.
- 6.4.12 For Zone 4, top-up shopping trips are largely undertaken within its principal town: Hounslow (58%), with 44% captured by town centre stores and 14% directed to edge/out of centre stores. Stores located on the edge/out of Brentford town centre attract 8% of trips from Zone 4 and 22% of trips other are to a number of foodstores and convenience stores across the Borough. Stores located outside of the study area account for 10% of trips and are split across a number of stores. No residents within Zone 4 indicated that they purchase top-up shopping items via the internet.

Figure 6.4: Principal Top-Up Food Shopping Patterns (%)

	Zones						
	West Hounslow	South West Hounslow	Feltham	Hounslow	East Hounslow	Brentford	Chiswick
	1	2	3	4	5	6	7
Hounslow	54	1	3	58	10	1	1
Hounslow Town Centre	31	0	1	44	9	1	1
Hounslow Edge/Out of Centre	23	1	2	14	1	0	0
Chiswick	0	0	0	0	1	3	77
Chiswick Town Centre	0	0	0	0	1	3	65
Chiswick Edge/Out of Centre	0	0	0	0	0	0	12
Brentford	3	1	1	8	20	64	1
Brentford Town Centre	2	1	1	0	0	61	1
Brentford Edge/Out Centre	1	0	0	8	20	3	0
Feltham	4	77	51	1	1	0	0
Feltham Town Centre	0	32	43	1	1	0	0
Feltham Edge/Out of Centre	4	45	8	0	0	0	0
Other inside Study Area	29	11	20	22	63	12	4
Outside Study Area	4	9	24	10	4	20	13
Internet/Delivery	5	1	1	0	1	0	4

Source: Derived from NEMS Household Survey Results (May 2018)

Notes: Figures may not add due to rounding

- 6.4.13 For Zone 5, the majority of top-up shopping trips are undertaken at other stores located within the Borough (63%), of these trips are largely split between Tesco Express, London Road (18%), Sainsbury's Local, London Road (16%) and Tesco Extra, Modgen Lane (13%). Tesco Extra at Syon Park, Brentford attracts 20% of trips and Hounslow attracts some 10% of trips.
- 6.4.14 Brentford retains the majority of top-up shopping trips (64%) from its zone (Zone 6), with most of these (61%) being undertaken in the town centre stores. Around 20% of trips are take place at stores outside the study area, 7% of these going to Sainsbury's Local Boston Parade, Hanwell and the rest being split across a number of stores. Other stores within the Borough attract some 12% of trips, with 6% of trips captured by Sainsbury's Local Ealing Road and 3% captured by Chiswick Town Centre stores.
- 6.4.15 Chiswick retains a high proportion of shopping trips from Zone 7 (77%). Of these trips 65% are undertaken at stores within the town centre and 12% take place at edge/out of centre stores. The remainder of top-up shopping trips for Zone 7 are undertaken outside of the Borough (13%) and via the internet (4%).

Comparison Goods Shopping Patterns

- 6.4.16 Hounslow attracts some 36% of comparison goods trips from Zone 1, with around 28% of such trips being undertaken outside of the study area. The trips undertaken outside of the study area are split across Central London (4%), Hayes Bridge Retail Park (3%), Ikea Drury Way (3%) and Kingston Upon Thames (2%) alongside others. Around 20% of residents in Zone 1 also undertake comparison goods shopping via the internet, of these 98% are received via home delivery with 2% collected from a locker. Brentford edge/out of centre facilities also attracts 5% of comparison goods shopping trips from Zone 1 residents, whilst Feltham attracts 4%.
- 6.4.17 For residents in Zone 2, Feltham attracts the highest proportion of comparison goods shopping trips at 33%, with around 29% of these within the town centre and 14% at edge/out of centre facilities. A smaller proportion of trips are undertaken in Hounslow Town Centre (6%) and then Brentford (2%). Similar to Zone 1, almost a third of Zone 2 residents undertake comparison goods shopping outside of the study area. Of these trips, Staines-upon-Thames is the most popular (13%) (town and out of centre facilities), followed by Kingston-upon-Thames (2%). Online purchases account for around 19% of such purchases, with the majority of these delivered to home (94%), with others delivered to work or collection from store.
- 6.4.18 Feltham also attracts the highest proportion of comparison goods shopping trips from its principal zone (Zone 3) at 36%. The majority of these trips are to stores within the town centre (26%) with 10% to edge/out of centre stores. Hounslow attracts around 6% of shopping trips from Zone 3 residents and Brentford 4%. Facilities located outside of the study area attract around 32% of such trips, with 12% to Kingston-upon-Thames, 4% to Staines-upon-Thames and the remainder split across a number of different centres/facilities. The internet/mail order purchases account for 19% and again the majority are delivered to home (97%) with a small proportion collected from store.

Figure 6.5: Comparison Goods Shopping Patterns

	Zones						
	West Hounslow	South West Hounslow	Feltham	Hounslow	East Hounslow	Brentford	Chiswick
	1	2	3	4	5	6	7
Hounslow	36	6	6	30	19	7	0
Hounslow Town Centre	36	6	6	30	19	7	0
Hounslow Edge/Out of Centre	0	0	0	0	0	0	0
Chiswick	0	0	0	1	3	5	30
Chiswick Town Centre	0	0	0	0	2	2	24
Chiswick Edge/Out of Centre	2	0	0	1	1	3	6
Brentford	5	2	4	13	12	27	3
Brentford Town Centre	0	1	0	4	1	8	0
Brentford Edge/Out Centre	5	1	4	9	11	19	3
Feltham	4	33	36	2	0	1	0
Feltham Town Centre	2	29	26	1	0	1	0
Feltham Edge/Out of Centre	2	14	10	1	0	0	0
Other inside Study Area	3	2	3	4	7	1	1
Outside Study Area	28	28	32	27	34	41	42
Internet/Delivery	20	19	19	23	25	19	25

Source: Derived from NEMS Household Survey Results (May 2018)

Notes: Figures may not add due to rounding

- 6.4.19 For Zone 4, Hounslow attracts the highest proportion of comparison goods shopping trips (30%) which is to be expected given it is the principal town within the zone. In terms of other facilities within the Borough, Brentford attracts 13% of such trips, followed by Feltham (2%) and Chiswick (1%). Over a quarter of residents in Zone 4 undertake comparison goods shopping outside of the study area (27%), 7% to Kingston-upon-Thames and the remainder split into small proportions across other nearby centres/facilities. The internet and mail order account for 22% and 1% respectively, again the majority of these purchases are delivered to home (97%) or collected from store.
- 6.4.20 For Zones 5, 6 and 7 the highest proportion of comparison goods purchases are undertaken outside of the study area at 34%, 41% and 42% respectively. Of these Twickenham and Kingston-upon-Thames each attract 8% of trips from Zone 5, whilst Ealing attracts 12% from Zone 6 and Westfield Shepherd's Bush and Central London attract 7% and 6% respectively of trips undertaken by residents within Zone 7. Hounslow attracts 19% of comparison goods trips of residents in Zone 5, all of these are within the town centre, this is followed by Brentford at 12% and only 3% at Chiswick. Other facilities within the study area account for 7%, these include Ivy Bridge Retail Park (3%) and Isleworth (2%). The internet is also popular for purchasing comparison goods within Zone 5, with around 25% of purchases made online. Of these, 87% are delivered to home with around 7% delivered to work and 5% for collection from store.

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- 6.4.21 For Zone 6, Brentford attracts 27% of comparison goods shopping trips, with 7% to Hounslow and 5% to Chiswick. Internet and mail order purchases account for 18% and 1% of purchases with the majority delivered to home (98%) and then collected from store. Chiswick attracts 30% of these trips from its principal zone (Zone 7), 24% to the town centre and 6% to out of centre facilities. Brentford is the only other town centre within the Borough which attracts comparison goods shopping trips from residents in Zone 7, and only accounts for a small proportion at 3%. Similar to Zone 5, the internet/mail order accounts for a quarter of comparison goods purchases, of these 92% are delivered to home, 7% collected from a store and 1% delivered to work.
- 6.4.22 When comparing with the results within the 2010 Retail Study, the Borough has seen a slight decrease in total expenditure for comparison goods purchases from 55.2% in the 2010 study, compared to 46% in 2018. Looking at the tables in greater detail, Hounslow retained 43% of comparison goods trips in 2010 from its principal zone (Zone 4), compared to 30% now. Whereas Brentford appears to have increased its retention rate for comparison goods shopping for residents in its zone (Zone 6), from 12% in the 2010 study, to 27%. For Chiswick, the figures are fairly similar with the 2010 study identifying 33% of residents from Zone 7 undertaking comparison goods shopping there, compared to 30% now. Feltham has increased its attractiveness for comparison goods purchases for nearby residents, as the 2010 study found Feltham attracted 29% and 27% of trips from residents in Zones 2 and 3 respectively, compared to 33% and 36% in 2018.

Non-bulky comparison goods excluding clothing and footwear

- 6.4.23 Hounslow has an influence on non-bulky comparison goods trips and attracts residents from across the Borough with the exception of Zone 7. Hounslow attracts 39% of trips from Zone 1, the remainder of these are predominantly undertaken outside of the study area (28%), with 6% of these in Central London and 3% at Hayes Bridge Retail Park. The internet then accounts for almost a quarter (24%) of non-bulky comparison goods purchases (excluding clothing and footwear) for residents in Zone 1, the majority of these items were home delivered (97%), although 3% were collected from a locker.
- 6.4.24 Zone 2 and 3 are similar in that Feltham attracts 41% and 32% of non-bulky comparison goods shopping trips (excluding clothing and footwear) respectively, 34% (Zone 2) and 28% (Zone 3) to the stores within the town centre and 7% and 2% to edge/out of centre stores. The remainder of trips for Zones 2 and 3 are also undertaken outside of the Borough (27% and 33%), with 9% of Zone 2 residents trips to Staines-upon-Thames and 13% of Zone 3 residents trips to Kingston-Upon-Thames. The internet accounts for 22% of trips for each zone with most purchases being delivered to home.
- 6.4.25 Hounslow retains 36% of non-bulky comparison goods shopping trips (excluding clothing and footwear) from its principal zone (Zone 4) with all of these trips captured by facilities in the town centre. Brentford attracts 7% of trips and 27% are to centres/stores outside of the study area, most notably Kingston-Upon-Thames (6%). Internet makes up 26% of purchases, 96% of which are home delivered with the remainder being collected from a store. Hounslow also attracts 19% of trips from Zone 5 and Brentford

edge/out of centre facilities attract 6%. Again, over a third of trips (35%) are undertaken outside of the study area, with Kingston-Upon-Thames remaining popular for residents in Zone 5 (9%), alongside Twickenham (9%). Residents in Zone 5 are most proficient at using the internet for purchases of non-bulky-comparison goods items (excluding clothing and footwear) at 30%. The majority of these items are still delivered to home (86%) albeit around 12% and delivered to work and the remainder collected from store.

Figure 6.6: Non-Bulky Comparison Goods Shopping Patterns (excluding Clothing & Footwear)

	Zones						
	West Hounslow	South West Hounslow	Feltham	Hounslow	East Hounslow	Brentford	Chiswick
	1	2	3	4	5	6	7
Hounslow	39	6	7	36	19	7	0
Hounslow Town Centre	39	6	7	36	19	7	0
Hounslow Edge/Out of Centre	0	0	0	0	0	0	0
Chiswick	0	0	0	0	2	3	30
Chiswick Town Centre	0	0	0	0	2	3	30
Chiswick Edge/Out of Centre	0	0	0	0	0	0	0
Brentford	3	2	2	7	7	22	2
Brentford Town Centre	0	1	0	2	1	10	0
Brentford Edge/Out Centre	3	1	2	5	6	12	2
Feltham	3	41	32	1	0	0	0
Feltham Town Centre	2	34	30	1	0	0	0
Feltham Edge/Out of Centre	1	7	2	0	0	0	0
Other inside Study Area	3	2	3	3	8	0	0
Outside Study Area	28	27	33	27	35	43	43
Internet/Delivery	24	22	22	26	30	24	24

Source: Derived from NEMS Household Survey Results (May 2018)

Notes: Figures may not add due to rounding

6.4.26 In terms of Zone 6, Brentford retains around 22% of trips from its zone, 10% to facilities in the town centre and 12% to edge/out of centre facilities. Hounslow attracts 7% of trips and Chiswick 3%. The majority of trips for non-bulky comparison goods items (excluding clothing and footwear), at almost half (43%), are undertaken outside of the study area. Ealing attracts around 14% of these trips, Kingston-Upon-Thames 6% and Kew Retail Park 3%. Chiswick attracts around 30% of shopping trips from its principal zone (Zone 7), with the remainder following similar pattern to residents within Zone 6, with 43% undertaken outside of the study area and 24% via online shopping, with the majority of purchases delivered to home.

6.4.27 In summary, the borough has a slightly lower retention rate of non-bulky comparison goods (excluding clothing and footwear) than comparison goods in total at around 42%. We have been unable to compare the findings with the 2010 study as it did not consider this group of items independently.

Clothing and Footwear Shopping Patterns

- 6.4.28 Turning to the shopping patterns for clothing and footwear, Figure 6.7 shows that Hounslow has some influence on the market share of all zones, with a proportion of clothing and footwear trips from all zones (except Zone 7) being undertaken there. For Zone 4, its principal zone, Hounslow attracts 50% of clothing and footwear trips, the remainder are split between facilities outside of the survey area (26%) and the internet (21%).
- 6.4.29 Almost half of clothing and footwear trips by Zone 1 residents are undertaken in Hounslow (45%), all of which are to stores within the town centre. Facilities located outside of the study area attract 35% of trips, 9% of which are to Westfield at Shepherd's Bush. Feltham attracts 30% of trips for clothing and footwear from Zone 2 residents and 36% from Zone 3, the majority of which are to stores within the town centre. Hounslow attracts 13% and 8% respectively and facilities outside of the survey area capture almost half of trips from each zone at 44% and 45%. For Zone 2 residents, Staines-Upon-Thames (town and out of centre facilities) is the most popular destination at 29% and Kingston-Upon-Thames is most popular for Zone 3 residents at 28%.
- 6.4.30 Zones 5 and 6 have similar patterns of shopping trips for clothing and footwear, with 28% and 21% undertaken in Hounslow and 2% and 3% respectively in Chiswick. Around 8% of trips from Zone 5 residents are undertaken at other facilities inside the study area, with 45% outside of the study area, predominantly at Richmond (11%), Twickenham (7%) and Westfield Shepherd's Bush (7%). For Zone 6, a significant 63% of clothing and footwear trips are undertaken outside of the survey area, almost half of which are at Ealing (27%), followed by 13% at Kew Retail Park.

Figure 6.7: Clothing and Footwear Shopping Patterns (%)

	Zones						
	West Hounslow	South West Hounslow	Feltham	Hounslow	East Hounslow	Brentford	Chiswick
	1	2	3	4	5	6	7
Hounslow	45	13	8	50	28	21	0
Hounslow Town Centre	45	13	8	50	28	21	0
Hounslow Edge/Out of Centre	0	0	0	0	0	0	0
Chiswick	0	0	0	0	2	3	30
Chiswick Town Centre	0	0	0	0	2	3	30
Chiswick Edge/Out of Centre	0	0	0	0	0	0	0
Brentford	0	0	0	0	2	0	1
Brentford Town Centre	0	0	0	0	0	0	0
Brentford Edge/Out Centre	0	0	0	0	2	0	1
Feltham	3	30	36	2	0	4	0
Feltham Town Centre	3	27	35	2	0	4	0
Feltham Edge/Out of Centre	0	3	1	0	0	0	0
Other inside Study Area	3	2	3	3	8	0	0
Outside Study Area	35	44	45	26	45	63	64
Internet/Delivery	17	14	11	21	21	11	23

Source: Derived from NEMS Household Survey Results (May 2018)

Notes: Figures may not add due to rounding

- 6.4.31 Leakage of clothing and footwear shopping trips is greatest from Zone 7, with 64% being undertaken outside of the study area and a further 23% via the internet. Chiswick retains 30% of clothing and footwear shopping trips from its zone, all of which are to stores within the town centre.
- 6.4.32 The proportion of clothing and footwear purchases made via the internet varies, with only 11% of purchases in Zones 3 and 5 being made online, compared to 23% for Zone 7. Of these online purchases, the majority from each zone were still delivered to home, yet between 15% and 30% were collected from store by residents in Zones 2, 5 and 7.
- 6.4.33 The 2010 study reported that Ealing, Hounslow, Feltham, Kingston and Staines were the top five destinations for clothing and footwear purchases. The current survey results suggest that Hounslow, Feltham and Kingston are still top destinations, yet Westfield appears to have taken the place of Ealing as a top destination for clothing and footwear shopping trips for residents within the study area.

Bulky Comparison Goods

- 6.4.34 Hounslow attracts 28% of bulky comparison goods shopping trips from Zone 1, 13% of trips are undertaken in Brentford, 7% in Chiswick and 6% in Feltham. Stores outside of the survey area attract 28%, Great Western Retail Park, Southall accounts for 6% and Ikea for 5%. Feltham is the most popular destination for bulky comparison goods shopping patterns for residents in Zones 2 and 3 at 53% and

41% respectively, with over half going to edge/out of centre facilities. Facilities outside of the study area attract 25% of shopping trips, these are split across a number of different centres and retail parks with no one store/area attracting a significant proportion of trips.

6.4.35 For Zone 4, its principal zone, Hounslow attracts only 10% of bulky goods shopping trips, with 33% going to Brentford, 4% to Chiswick and 3% to Feltham. Over a quarter of trips (26%) are again undertaken outside of the study area for residents in Zone 4, with Kingston-upon-Thames attracting 9%.

6.4.36 Brentford attracts half of the shopping trips from its zone (Zone 6), 42% of which are at the edge/out of centre facilities. Chiswick attracts 10% and out of survey facilities attract 27%. Chiswick attracts 33% of trips from its zone (Zone 7), 13% to the town centre and 20% to edge/out of centre facilities, most notably B&Q at Gunnersbury Avenue. However, Zone 7 still has the highest proportion of leakage for bulky goods purchases across each of the zones at 33%.

Figure 6.8: Bulky Goods Shopping Patterns (%)

	Zones						
	West Hounslow	South West Hounslow	Feltham	Hounslow	East Hounslow	Brentford	Chiswick
	1	2	3	4	5	6	7
Hounslow	28	4	2	10	17	3	0
Hounslow Town Centre	28	4	2	10	17	3	0
Hounslow Edge/Out of Centre	0	0	0	0	0	0	0
Chiswick	7	1	0	4	5	10	33
Chiswick Town Centre	0	0	0	0	2	1	13
Chiswick Edge/Out of Centre	7	1	0	4	3	9	20
Brentford	13	2	11	33	29	50	7
Brentford Town Centre	1	1	0	11	2	8	0
Brentford Edge/Out Centre	12	1	11	21	27	42	7
Feltham	6	53	41	3	0	0	0
Feltham Town Centre	2	19	11	0	0	0	0
Feltham Edge/Out of Centre	4	34	30	3	0	0	0
Other inside Study Area	7	1	3	5	5	1	1
Outside Study Area	28	25	25	26	28	27	33
Internet/Delivery	13	15	17	18	14	9	25

Source: Derived from NEMS Household Survey Results (January 2018)

Notes: Figures may not add due to rounding

6.4.37 The internet accounts for between 9% and 25% of all bulky comparison goods purchases across all zones. Of these, at least 90% were delivered to home with between 2% and 6% being 'click and collect' purchases.

Internet

- 6.4.38 The NEMS survey results identify that, for certain comparison goods, residents in the Borough of Hounslow are proficient at shopping online. The goods most commonly bought online include, books, CDs & DVDs (between 44-69%). This is followed by large household electricals (16-42%) and small electrical goods (13-41%). Unsurprisingly, chemist goods are the least common comparison goods to be purchased by residents online (1-5%).
- 6.4.39 For convenience goods, the level of internet shopping varies between the zones, with only 1% of respondents in Zone 6 indicating they last undertook their main food shop online, compared to 12% and 10% in Zones 7 and 1 respectively. As expected, given the nature of a top-up food shopping a fairly low proportion is undertaken online.

Figure 6.9 Internet/Mail Order Shopping Market Share (%)

Goods Category	Zones						
	West Hounslow	South West Hounslow	Feltham	Hounslow	East Hounslow	Brentford	Chiswick
	1	2	3	4	5	6	7
Main Food	10	4	3	6	6	1	12
Top-up Food	5	1	1	0	1	0	4
Clothing & Footwear	17	14	11	21	21	11	23
Books, CDs & DVDs	69	51	47	64	63	44	52
Furnishings & Household Textile Goods	14	20	30	17	27	35	21
Small Household Goods	4	8	21	12	14	18	14
Clocks, Jewellery, Watches	20	30	17	26	16	23	8
Toys, Games, Bicycles & others	18	27	13	28	48	29	38
Chemist Goods	1	2	1	3	3	1	5
Large Household Electricals	27	21	28	34	20	16	42
Small Electrical Goods	41	13	23	30	36	20	33
Furniture, Carpets & Floor Coverings	11	19	21	16	14	11	33
DIY incl. Gardening Goods	1	6	2	6	10	1	1

Source: Derived from NEMS Household Survey Results (May 2018)

- 6.4.40 In terms of how items purchased online are received, Figure 6.10 sets out the proportion that were via home delivery and those by click and collect.

Figure 6.10: Online Purchases Delivery Method

Goods Category	Online Delivery Method (%)	
	Home Delivery	Click and Collect
Main Food	100	0
Top-up Food	N/A	N/A
Clothing & Footwear	90	7
Books, CDs & DVDs	93	1
Furnishings & Household Textile Goods	95	4
Small Household Goods	99	1
Clocks, Jewellery, Watches	89	4
Toys, Games, Bicycles & others	91	2
Chemist Goods	100	0
Large Household Electricals	96	3
Small Electrical Goods	96	2
Furniture, Carpets & Floor Coverings	97	2
DIY incl. Gardening Goods	98	1

Source: Derived from NEMS Household Survey Results (May 2018)

6.4.41 In summary, the results show that:

- for online convenience goods shopping, all were received via home delivery;
- over 90% of all comparison goods categories were home delivered, with the exception of clocks, jewellery and watches at 89%;
- over 95% of goods in categories: furnishings and household textiles; small household goods; chemist goods; small and large electricals; furniture carpets and floor coverings and DIY goods were home delivered;
- purchases for clothing and footwear were the items most commonly collected from store (7%); and
- around 3% of purchases for books, CDs and DVDs were downloaded rather than delivered or collected from store.

6.5 Summary

6.5.1 The above sections set out the existing retail provision within the Borough of Hounslow, surrounding competing centres and an assessment of the shopping patterns of residents within the study area. The subsequent sections provide health checks and our qualitative assessment of any retail related deficiencies within each of the centres.

7.0 Quantitative Needs Assessment

7.1 Introduction

7.1.1 This section of the study provides an assessment of convenience and comparison goods quantitative needs (retail capacity). As part of the needs assessment the current population and available expenditure (for both convenience and comparison goods) across the Study Area is reviewed and assessed.

7.2 Retail Capacity

7.2.1 We have examined the need for new convenience and comparison goods floorspace of the agreed reporting periods to 2033 (i.e. at 2022, 2027, 2029 and 2033). At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long term are reflective of any changes to relevant available data.

7.2.2 A complete series of quantitative retail capacity tables are provided at **Appendices E-G** to provide further detail in terms of the step-by-step application of our quantitative assessment methodology

Population & Retail Expenditure

Population

7.2.3 The base population within each survey zone has been calculated using the population data for each electoral ward provided by the London Borough of Hounslow. The baseline population data from the Council is being utilised to inform other emerging evidence base documents. The population has been projected forward using the projections provided by the Council for each electoral ward and have been manually adapted for each study zone. As a result the projections take into account the growth planned as part of the WoB and GWC Local Plan Reviews.

7.2.4 The defined Study Area is estimated to contain a resident population of approximately 298,123 people at 2018 rising to 326,833 people at 2033. This represents an increase in population within the Study Area of 28,710 people (equating to an increase of 9.6%) between 2018 to 2033.

7.2.5 Figure 7.1 provides a detailed breakdown of the forecast population change within each survey zone in each of the reporting periods to 2033.

Figure 7.1: Study Area Population by Survey Zone (2018-2033)

Zone	2018	2022	2027	2029	2034
1	50,185	50,594	50,916	51,351	51,849
2	29,310	30,327	30,838	30,900	30,912
3	38,085	38,172	39,059	39,747	41,984
4	62,639	68,355	72,387	73,228	74,016
5	41,493	43,305	44,936	45,739	46,313
6	27,921	30,275	31,613	31,881	32,742
7	48,490	48,445	48,189	48,452	49,017

Source: Table 1, Appendix E

Expenditure

- 7.2.6 In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG and other retail/leisure planning consultants in calculating retail capacity.
- 7.2.7 The base year for the Experian expenditure data is 2018. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 15, which was published in December 2017. Appendix 3 of the Retail Planner Briefing Note identifies the following annual growth forecasts for convenience and comparison goods which inform our assessment.

Figure 7.2: Expenditure Growth Forecasts

Year	Convenience (%)	Comparison (%)
2018	-0.7	0.8
2019	-0.2	2.1
2020	0.2	2.9
2021	0.2	3.3
2022	0.1	3.4
2023	-0.1	3.4
2024	0.1	3.3
2025	0.1	3.2
2026	0.1	3.2
2027	0.1	3.1
2028	0.1	3.0
2029	0.0	3.1
2030	0.0	3.2
2031	0.2	3.4
2032	0.1	3.3
2033	0.2	3.4

Source: Appendix 3, Retail Planner Briefing Note 15 (December 2017)

- 7.2.8 For convenience goods, Experian forecasts growth to remain subdued with a longer term forecast per head growth of +0.1% per annum. For comparison goods, Experian identify growth to increase from 0.8% per annum to 3.4% per annum in the short term (2018-2022) with growth rates ranging between 3.0-3.4% per annum in the medium and longer term (2023-2033).

- 7.2.9 Experian Retail Planner Briefing Note 15 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. In accordance with retail planning standard practice, we have removed any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.
- 7.2.10 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.
- 7.2.11 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian's 'adjusted' figure (provided at Appendix 3 Retail Planner Briefing Note 15) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Figure 7.3 is removed from identified expenditure as it is not available to stores within the Study Area.

Figure 7.3: Special Forms of Trading Forecasts

Year	Convenience (%)	Comparison (%)
2018	3.4	15.4
2022	4.	17.2
2027	4.7	17.6
2029	4.9	17.7
2033	5.2	17.9

Source: Appendix 3, Retail Planner Briefing Note 15 (December 2017)

- 7.2.12 Based on the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2022, 2027, 2029 and 2033. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

- 7.2.13 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2018, the resident population of the Study Area generates some £527.4m of convenience goods expenditure. Available convenience goods expenditure is then forecast to increase to £567.2m at 2033, which represents an increase of £39.8m (or 7.5%) between 2018 and 2033.

Figure 7.4: Total Available Study Area Expenditure – Convenience Goods (£m)

2018 (£m)	2022 (£m)	2027 (£m)	2029 (£m)	2033 (£m)	Growth 2018-2022 (£m)	Growth 2018-2027 (£m)	Growth 2018-2029 (£m)	Growth 2018-2033 (£m)
527.4	540.0	552.3	557.9	567.2	12.6	24.8	30.5	39.8

Source: Table 3, Appendix E
2016 Prices

Comparison Goods Expenditure

7.2.14 For comparison goods, Figure 7.5 sets out our estimation that the resident population of the Study Area will generate some £801.8m of comparison goods expenditure at 2018. Available comparison goods expenditure is then forecast to increase to £1,360m at 2033, which represents an increase of £558.4m (or 69.7%) between 2018 and 2033.

7.2.15 Whilst the identified expenditure increase is significant, the rate of growth is more modest than that previously achieved, principally because of the expectation that an ever-increasing proportion of comparison goods expenditure will be committed through special forms of trading (most particularly, internet shopping).

Figure 7.5: Total Available Study Area Expenditure – Comparison Goods (£m)

2018 (£m)	2022 (£m)	2027 (£m)	2029 (£m)	Growth 2018-2022 (£m)	Growth 2018-2027 (£m)	Growth 2018-2029 (£m)	Growth 2018-2033 (£m)
801.8	908.9	1,096	1,176	107.1	294.9	375.0	558.4

Source: Tables 5a-e, Appendix E
2016 Prices

7.2.16 For the purposes of this Study, comparison goods expenditure has been divided into 11 subcategories: 'DIY', 'Large Electrical Household Items', 'Small Electrical Items', and 'Furniture, Carpets & Floor Coverings' (these four categories collectively being referred to as bulky goods) and, 'Clothing & Footwear', 'CDs, DVDs and Books', 'Furnishings & Household Textiles', 'Health and Beauty/Chemist Goods', 'Small Household Goods', 'Clocks Jewellery & Watches', and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.

7.2.17 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and
- The future efficiency of retail floorspace.

Capacity Formula

7.2.18 For all types of retail capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) less Turnover (£m) (allowing for improved 'productivity') equals Surplus or Deficit (£m).

Expenditure (£m) – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:

- Growth in population;
- Growth in expenditure per person per annum; and
- Special Forms of Trading (e.g. internet shopping, catalogue shopping and so on).

Turnover (£m) – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Global Data reports – independent analysis which lists the sales densities for all major multiple retailers.

Surplus/Deficit (£m) – This represents the difference between the expenditure and turnover figures outlined above. A surplus figure represents an effective under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace could be supported), whereas a deficit would suggest a quantitative overprovision of retail facilities.

7.2.19 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods.

Great West Corridor and West of Borough

7.2.20 Before assessing the capacity for additional retail floorspace within the Borough, forthcoming development planned in the Great West Corridor and the West of the Borough is reviewed. As identified at Section 2.5, the Great West Corridor (GWC) Local Plan Review seeks to deliver around 490,000sq m of workspaces as part of mixed-use employment and residential developments with supporting active uses including retail. Figure 7.6 shows the extent of the GWC Local Plan Review.

Figure 7.6: GWC Local Plan Study Area



Source: Figure 0.01 GWC Local Plan Review Preferred Options Consultation October 2017.

- 7.2.21 Emerging Policy E3 identifies the opportunity for a new Local Centre around the new rail station at Lionel Road. In accordance with the sequential approach to site selection, any identified capacity for retail/leisure floorspace should be directed towards existing town centres. However, it is noted that an element of convenience goods floorspace identified for the town centre of Brentford could be accommodated within the new Local Centre planned at Lionel Road. Unless specifically serving a local role comparison goods and main leisure floorspace should be promoted within existing designated town centres.
- 7.2.22 Turning to the West of the Borough, the West of Borough (WoB) Local Plan Review seeks to promote mixed-use developments with shops at ground floor level in the town centre of Feltham and local centres of East Bedfont, Cranford and Heston. Figure 7.7 shows the extent of the WoB Plan coverage.

Figure 7.7: Extent of the WoB Plan



Source: Figure 0.01 WoB Local Plan Review Preferred Options Consultation October 2017.

- 7.2.23 As specified at 7.2.24, any identified capacity for additional retail/leisure floorspace should be directed towards designated town centres in line with the sequential approach to site selection in the NPPF. The only town centre within the area covered by the WoB Plan is Feltham Town Centre, additional retail development promoted within the WoB Local Plan Review should be directed here. Again, similar to the GWC, an element of any convenience goods floorspace identified for the town centre of Feltham could be accommodated within the local centres of East Bedfont, Cranford and Heston within the WoB. Nevertheless, unless serving a local role comparison good and main leisure uses should be directed towards the designated town centre of Feltham in the first instance.

Convenience Goods Capacity

- 7.2.24 In order to ascertain the likely need for additional convenience floorspace in the town centres in the Borough of Hounslow, it is first necessary to consider the performance of the current provision. Given the geography of the towns and their existing retention of convenience goods expenditure, it is assumed that the future convenience goods expenditure available to the town centres (Hounslow, Chiswick, Brentford and Feltham) will be commensurate with their current market share.
- 7.2.25 Figure 7.8 sets out the current convenience goods trading position in the towns compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2033. The benchmark turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey derived turnover equates to the expected level of turnover).
- 7.2.26 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, we have assessed the split in convenience/comparison goods provision in each store having regard to our own observations during store visits and the typical convenience/comparison floorspace ratio published by retail data provider, Global Data. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.
- 7.2.27 Our assessment for the study area identifies that the expected benchmark turnover of existing convenience goods provision in the administrative area is £534.5m per annum at 2018, which is £88.8m more than the identified survey-derived turnover of £445.7. This suggests that, taken cumulatively, existing convenience goods provision in the study area are 'under trading' when compared to expected turnover.
- 7.2.28 There are instances where specific facilities trade very strongly or relatively poorly. For example, the Morrisons store in Brentford, which has an estimated convenience goods benchmark turnover of £19.5m, but turns over an estimated £25.3m is trading particularly well whilst the Tesco store at The Centre, Feltham, with an estimated convenience goods benchmark turnover of £26.2m, but turns over an estimated £17.1m, is a lesser performing store.

7.2.29 It is necessary to consider the capacity on an individual town basis. The assessment identifies that, with the exception of Feltham, there is capacity for additional convenience floorspace in the towns within the Borough. As identified above, this is primarily due to the healthy level of existing convenience goods provision in Feltham. The assessment also identifies that most of the existing foodstores in Feltham are currently under trading suggesting that there is an overprovision of convenience goods facilities. Figure 7.8 below sets out the convenience goods expenditure capacity estimates for Hounslow, Chiswick, Brentford and Feltham.

Figure 7.8: Quantitative Need for Convenience Goods Floorspace

Year	Benchmark Turnover (£m)	Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq m net)	
					Min	Max
Hounslow						
2018	83.6	96.7	1.4	14.5	1,200	1,500
2022	83.4	99.0	1.4	17.1	1,400	1,700
2027	83.5	101.2	1.5	19.2	1,600	1,900
2029	83.7	102.3	1.5	20.0	1,700	2,000
2033	84.0	104.0	1.5	21.4	1,800	2,200
Chiswick						
2018	80.7	80.9	2.7	2.9	200	300
2022	80.4	82.9	2.7	5.2	400	500
2027	80.6	84.7	2.8	7.0	600	700
2029	80.8	85.6	2.8	7.7	600	800
2033	81.1	87.0	2.9	8.8	700	900
Brentford						
2018	79.7	86.5	2.6	9.4	800	900
2022	79.5	88.5	2.7	11.7	1,000	1,200
2027	79.6	90.5	2.7	13.6	1,100	1,400
2029	79.8	91.5	2.7	14.4	1,200	1,500
2033	80.1	93.0	2.8	15.7	1,300	1,600
Feltham						
2018	143.3	90.7	3.4	-49.2	-	-
2022	142.9	92.8	3.5	-46.5	-	-
2027	143.2	94.9	3.6	-44.7	-	-
2029	143.5	95.9	3.6	-43.9	-	-
2033	144.0	97.5	3.7	-42.8	-	-

Source: Tables 5a, 5b, 6a, 6b, 7a, 7b, 8a & 8b of Appendix F

Minimum Floorspace Requirement - Average sales density assumed to be £11,952 per sq.m is based on the average sales density of the leading four supermarkets - derived by Global Data

Maximum Floorspace Requirement - Average sales density assumed to be £9,866 per sq.m is based on the average of discount operators (Aldi & Lidl) - derived from Global Data

2016 Prices

7.2.30 The Council has confirmed that, at the time of writing, there is only 1 convenience goods retail commitment/planning permissions in the Borough providing a net sales floorspace of 200sq m, in Brentford town centre, that needs to be taken into account in this retail capacity assessment. In order to meet the identified capacity for the towns, the Council need to identify suitable sites in accordance with the sequential approach to site selection for any future development.

- 7.2.31 We understand that planning permission has been granted for a significant mixed-use redevelopment to the south of Brentford High Street and Waterside. The redevelopment comprises 876 residential units, retail (A1 use), business (B1 use) and leisure (D1/D2 use) and facilities for mooring of boats and associated facilities and works. Following review of the supporting application documentation and discussions with LBHC the following convenience/comparison floorspace has been assumed within the assessment: 1,397sq m net convenience floorspace (including foodstore). Further details are provided at **Appendix F** Table 7c. Planning permission (ref. 00607/228-246/P1) has also been granted for the mixed-use redevelopment of the Morrisons foodstore within the town centre. Given that proposed redeveloped foodstore will involve a similar level of retail floorspace as the existing store it does not need to be included as a commitment in so far as this retail capacity assessment is concerned.
- 7.2.32 It should be noted that only commitments providing a net sales floorspace of 200sq m or greater are included in our assessment; it is considered that proposals of a lesser scale are unlikely to have a tangible effect on shopping patterns.
- 7.2.33 Set out at Figure 7.9, we estimate that should the convenience goods floorspace of the mixed use redevelopment commitments operate, the approximate convenience turnover would be £15.7m. Full details of the assumptions made in estimating the turnover of the commitments are provided in the notes that accompany tables 7c of **Appendix F**.
- 7.2.34 Following the commitments in Brentford, the residual expenditure capacity identified at 2018 is -£6.4m, although the deficit reduces, the operation of the commitment in Brentford would absorb all capacity for additional convenience floorspace over the period to 2033.

Figure 7.9: Quantitative Need for Convenience Goods Floorspace in Brentford – Post Commitment

Year	Convenience Goods				
	£m			Floorspace Requirement (sq m net)	
	Surplus	Commitments	Residual	Min	Max
Brentford					
2018	9.4	15.7	-6.4	-	-
2022	11.7	15.7	-3.9	-	-
2027	13.6	15.7	-2.1	-	-
2029	14.4	15.7	-1.3	-	-
2033	15.7	15.8	-0.1	-	-

Source: Tables 7c & 7d of Appendix F
2016 Prices

- 7.2.35 Should the Waterside development not be delivered, and there is capacity for additional convenience floorspace within Brentford Town Centre as per the figures in Figure 7.8, the Council need to identify suitable sites in accordance with the sequential approach to site selection for any future development. It is also noted that a small local centre is proposed within the emerging Great West Corridor Local Plan Review around the new station at Lionel Road.

Capacity for Future Comparison Goods Floorspace

- 7.2.36 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area, and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2018.
- 7.2.37 We assume that there is therefore a nil quantitative need for any additional floorspace across the study area at 2018. For the purpose of our initial quantitative modelling exercise, it has also been assumed that the future performance of the Borough of Hounslow's comparison goods facilities will be commensurate with their current market share. Our assessment also takes into consideration the fact that the Town Centres, retail parks and standalone large format retail units will attract some custom from outside the Study Area. Through discussions with the Council and consideration of the previous retail study we have assumed that 2% of the overall turnover of comparison goods retailers in the town centres of Hounslow and Feltham will derive from outside the Study Area, 3% of turnovers for Chiswick and 4% for Brentford. The inflow allowance has the net effect of increasing the boroughs identified comparison goods survey derived turnover from £801.8m to £809.6m at 2018.
- 7.2.38 In order to ascertain the likely need for additional comparison goods floorspace within each town, we consider them independently and identify their market share below.
- 7.2.39 The Council has confirmed that the following commitments for Hounslow and Brentford should be taken into account in the retail capacity assessment.
- Hounslow High Street Quarter – construction commenced in January 2018 for redevelopment including 528 residential units, multi-screen cinema (6,408sq m), commercial retail uses (A1-A5) (11,199sq m), car parking and associated landscaping. Following review of the application documentation and discussions with LBHC 5,879sq m net comparison goods floorspace has been assumed within the assessment.
 - Land to the South Side of Brentford High Street and Waterside – Comprehensive mixed-use redevelopment comprising 876 residential units, retail (A1 use), business (B1 use) and leisure (D1/D2 use) and facilities for mooring of boats and associated facilities and works. Following review of the submission documentation and discussions with LBHC the following convenience/comparison floorspace has been assumed within the assessment: 1,397sq m net convenience floorspace (including foodstore) and 4,447sq m net comparison goods floorspace.

7.2.40 At the time of writing, the Council has confirmed that there are no comparison goods retail commitments/planning permissions for Chiswick or Feltham that need to be taken into account in the retail capacity assessment.

Hounslow

7.2.41 Facilities in the Hounslow area claim £185.0m of all comparison goods expenditure generated by Hounslow residents at 2018 which equates to a study area market share of 23.1%. Our assessment 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Hounslow's retail facilities going forward. By 'rolling forward' this market share and making provision for inflow deriving from visitors to Hounslow we estimate that facilities in Hounslow will attract £209.7m of comparison goods expenditure at 2022, increasing to £253.1m at 2027, £271.6m at 2029, and to £313.9m at 2033.

7.2.42 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2022 there will be a substantial expenditure surplus of £11.1m to support additional comparison goods floorspace within Hounslow. As set out in Figure 7.10, this surplus is forecast to increase to £31.3m at 2027 and further to £61.7m at 2033. Account has been made for the turnover efficiency of existing comparison goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time). This surplus expenditure equates to a comparison goods floorspace requirement of between 2,000-3,400sq m net (depending on format and operator) by 2022, increasing to between 5,000-8,700sq m net by 2027, between 6,100-10,600sq m net by 2029 and increasing further to between 8,600sq m and 15,000sq m net by 2033.

Figure 7.10: Quantitative Need for Comparison Goods Floorspace in Hounslow – Before Commitments

Year	Benchmark Turnover (£m)	Hounslow Turnover (£m)	Hounslow Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq m net)	
					Min	Max
2022	11.1	209.7	4.2	11.1	2,000	3,400
2027	31.1	253.1	5.0	31.3	5,000	8,700
2029	40.0	271.6	5.4	40.0	6,100	10,600
2033	61.7	313.9	6.3	61.7	8,600	15,000

Source: Table 15a of Appendix G

Benchmark turnover to increase in line with improvements in turnover efficiency as set out in Figure 4b of Experian Retail Planner Briefing Note 15

Assumes constant market share of Study Area expenditure claimed by facilities in Hounslow
2016 Prices

7.2.43 This initial analysis does not take into account existing commitments, which we set out in Table 16c of **Appendix G**. The Hounslow High Street Quarter redevelopment scheme is intended to provide around 5,879sq m net comparison goods retail floorspace. Assuming this was operational at 2018, it would have

a turnover of around £30.9m. The requirement in respect of additional comparison goods floorspace following the commitment is set out below at Figure 7.11.

Figure 7.11: Quantitative Need for Comparison Goods Floorspace in Hounslow – After Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq m net)	
	Surplus	Commitments	Residual	Min	Max
2022	11.1	33.2	-22.1	-	-
2027	31.3	37.1	-5.8	-	-
2029	40.0	38.8	1.3	200	300
2033	61.7	42.3	19.4	2,700	4,700

Source: Table 16c of Appendix G

Min Floorspace Capacity - Average sales density assumed to be £5,250/sq m at 2017 which WYG consider to be towards the higher end of what could be achieved in Hounslow

Max Floorspace Capacity - Average sales density assumed to be £3,000/sq m at 2017 which WYG consider to be towards the lower end of what could be achieved in Hounslow
2016 Prices

- 7.2.44 Figure 7.11 shows that the commitment would initially absorb any available capacity for additional comparison goods retail floorspace, yet by 2029 there would be a small requirement for between 200-300sq m net floorspace growing to between 2,700 and 4,700sq m net floorspace by 2033.

Chiswick

- 7.2.45 In assessing the quantitative need for additional comparison goods floorspace in Chiswick, we once again adopt the position that existing facilities are trading 'in equilibrium' and that there is therefore a nil quantitative need for any additional floorspace across Chiswick at 2018. It has also again been assumed for this assessment that the future performance of Chiswick's comparison goods facilities will be commensurate with their current market share.
- 7.2.46 Through consideration of the comparison goods facilities in, and attractiveness of, the town centre to visitors/tourists, we have made an estimate of the proportion of centre/facility turnover derived from outside the Study Area. Our inflow estimates are set out in Table 14 of **Appendix G**.
- 7.2.47 The inflow allowance has the net effect of increasing Chiswick's identified comparison goods survey derived turnover from £79.9m to £82.1m at 2018.
- 7.2.48 The £79.9m of comparison goods expenditure claimed from inside the Study Area at 2018 equates to a market share of 10% of all comparison goods expenditure generated by residents of the Study Area. Our assessment 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Chiswick's retail facilities going forward.

- 7.2.49 By 'rolling forward' this market share and making provision for inflow deriving from visitors to the Study Area, we estimate that facilities in Chiswick will attract £88.2m of comparison goods expenditure at 2022, increasing to £98.6m at 2027, £103m at 2029 and to £112.4m at 2033.
- 7.2.50 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2022 there will be an expenditure surplus of £4.8m to support additional comparison goods floorspace within Chiswick. As set out in Figure 7.12, this surplus is forecast to increase to £13.6m at 2029, and then to a fairly substantial £26.8 at 2033. Account has again been made for the turnover efficiency of existing comparison goods floorspace to increase.
- 7.2.51 This surplus expenditure equates to comparison goods floorspace capacity of between 900-1,500sq m net (depending on format and operator) at 2022, increasing to between 2,200-3,800sq m net by 2027 and 2,600sq m to 4,600sq m net by 2029. At 2033, there is identified capacity for between 3,700-6,500sq m net comparison goods floorspace.

Figure 7.12: Quantitative Need for Comparison Goods Floorspace in Chiswick

Year	Benchmark Turnover (£m)	Chiswick Turnover (£m)	Chiswick Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq m net)	
					Min	Max
2022	88.2	90.6	2.4	4.8	900	1,500
2027	98.6	109.3	2.9	13.6	2,200	3,800
2029	103.0	117.3	3.1	17.4	2,600	4,600
2033	112.4	135.6	3.6	26.8	3,700	6,500

Source: Table 18a & 18b of Appendix G

Benchmark turnover to increase in line with improvements in turnover efficiency as set out in Figure 4b of Experian Retail Planner Briefing Note 15

Assumes constant market share of Study Area expenditure claimed by facilities in Chiswick 2016 Prices

- 7.2.52 Given that there are no commitments for comparison goods floorspace to take account of within Chiswick Town Centre, the expenditure and floorspace capacity remains as per Figure 7.12.

Brentford

- 7.2.53 For Brentford, facilities in the area claim £59.6m of all comparison goods expenditure generated by residents at 2018, which equates to a market share of 7.4%. By 'rolling forward' this market share and making provision for inflow deriving from visitors to Brentford, we estimate that facilities in Brentford will attract £64.8m of comparison goods expenditure at 2022, increasing to £72.4m at 2027, £75.6m at 2029, and to £82.5m at 2033.
- 7.2.54 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2022 there will be surplus expenditure of £3.5m to support additional comparison goods floorspace within Brentford. As set out in Figure 7.13, this surplus is forecast to increase to £10.0m at 2027 and further to £19.7m at 2033. As per

Hounslow and Chiswick, account has been made for the turnover efficiency of existing comparison goods floorspace to increase. This surplus expenditure equates to a comparison goods floorspace requirement of between 600-1,100sq m net (depending on format and operator) by 2022, increasing to between 1,600-2,800sq m net by 2027, between 1,900-3,400sq m net by 2029 and increasing further to between 2,700sq m and 4,800sq m net by 2033.

Figure 7.13: Quantitative Need for Comparison Goods Floorspace in Brentford – Before Commitments

Year	Benchmark Turnover (£m)	Brentford Turnover (£m)	Brentford Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq m net)	
					Min	Max
2022	64.8	67.6	0.7	3.5	600	1,100
2027	72.4	81.6	0.8	10.0	1,600	2,800
2029	75.6	87.5	0.9	12.8	1,900	3,400
2033	82.5	101.2	1.0	19.7	2,700	4,800

Source: Table 17a of Appendix G

Benchmark turnover to increase in line with improvements in turnover efficiency as set out in Figure 4b of Experian Retail Planner Briefing Note 15

Assumes constant market share of Study Area expenditure claimed by facilities in Brentford
2016 Prices

- 7.2.55 However, this initial analysis does not take into account the existing commitment at Brentford Waterside, (see Table 17c of **Appendix G**). The commitment is intended to provide around 4,447sq m net comparison goods retail floorspace. Assuming this was operational at 2018, it would have a turnover of around £23.7m. The requirement in respect of additional comparison goods floorspace following the commitment is set out below at Figure 7.14.

Figure 7.14: Quantitative Need for Comparison Goods Floorspace in Brentford – After Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq m net)	
	Surplus	Commitments	Residual	Min	Max
2022	3.5	25.4	-21.9	-	-
2027	10.0	28.5	-18.5	-	-
2029	12.8	29.7	-16.9	-	-
2033	19.7	32.4	-12.7	-	-

Source: Table 16c of Appendix G

Min Floorspace Capacity - Average sales density assumed to be £5,250/sq m at 2017 which WYG consider to be towards the higher end of what could be achieved in Brentford

Max Floorspace Capacity - Average sales density assumed to be £3,000/sq m at 2017 which WYG consider to be towards the lower end of what could be achieved in Brentford

2016 Prices

- 7.2.56 Figure 7.14 shows that the Brentford Waterside scheme would absorb any available capacity throughout the plan period.

Feltham

- 7.2.57 In assessing the quantitative need for additional comparison goods floorspace in Feltham, we once again adopt the position that existing facilities are trading 'in equilibrium' and that there is therefore a nil quantitative need for any additional floorspace across Feltham at 2018. It has also again been assumed for this assessment that the future performance of Feltham's comparison goods facilities will be commensurate with their current market share.
- 7.2.58 Through consideration of the comparison goods facilities in, and attractiveness of, the town centre to visitors/tourists, we have made an estimate of the proportion of centre/facility turnover derived from outside the Study Area. Our inflow estimates are set out in Table 14 of **Appendix G**.
- 7.2.59 The inflow allowance has the net effect of increasing Feltham's identified comparison goods survey derived turnover from £87.1 to £88.6m at 2018.
- 7.2.60 The £87.1m of comparison goods expenditure claimed from inside the Study Area at 2018 equates to a market share of 10.9% of all comparison goods expenditure generated by residents of the Study Area.
- 7.2.61 By 'rolling forward' the towns existing market share and making provision for inflow deriving from visitors to the Study Area, we estimate that facilities in Feltham will attract £98.8m of comparison goods expenditure at 2022, increasing to £119.2m at 2027, £127.9m at 2029 and to £147.8m at 2033.
- 7.2.62 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2022 there will be an expenditure surplus of £5.4m to support additional comparison goods floorspace within Feltham. As set out in Figure 7.15, this surplus is forecast to increase to £14.7m at 2027, £18.8m at 2029 and then to £28.9m at 2033.

Figure 7.15: Quantitative Need for Comparison Goods Floorspace in Feltham

Year	Benchmark Turnover (£m)	Feltham Turnover (£m)	Feltham Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq m net)	
					Min	Max
2022	95.2	98.8	1.6	5.4	900	1,600
2027	106.5	119.2	2.0	14.7	2,300	4,100
2029	111.2	127.9	2.1	18.8	2,900	5,000
2033	121.3	147.8	2.4	28.9	4,000	7,000

Source: Table 18a of Appendix G

Benchmark turnover to increase in line with improvements in turnover efficiency as set out in Figure 4b of Experian Retail Planner Briefing Note 15

Assumes constant market share of Study Area expenditure claimed by facilities in Feltham
2016 Prices

- 7.2.63 Given that there are no comparison goods retail commitments/planning permissions to take account of, there is assessed to be capacity for additional comparison goods floorspace of between 900-1,600sq m net at 2022 increasing to around 4,000-7,000sq m net by 2033.

7.3 Summary

- 7.3.1 The above assessment identifies that with the exception of Feltham, there is capacity for additional convenience floorspace in each of the towns within the Borough. The lack of capacity within Feltham is primarily due to the existing convenience goods provision in the town. The assessment identifies that most of the existing foodstores in Feltham are under trading suggesting that there is an over provision of convenience goods facilities in the town. In terms of Brentford, should the convenience floorspace part of the Brentford Waterside development be delivered, this will absorb any convenience floorspace requirements for the town centre over the plan period.
- 7.3.2 For comparison goods, the capacity for each town varies. As anticipated, given it is a large Metropolitan Centre, the majority of comparison goods floorspace capacity is identified in Hounslow (between 8,600sq m and 15,000sq m net by the end of the plan period). However, assuming the High Street Quarter redevelopment is built out, this reduces the floorspace requirement to between 2,700sq m and 4,700sq m net by the end of the plan period.
- 7.3.3 In addition, a relatively large level of comparison goods floorspace capacity is identified for Chiswick (between 3,700 and 6,500sq m net) and Feltham (4,000-7,000sq m net) by the end of the plan period. For Brentford, any identified capacity is absorbed by the Waterfront redevelopment scheme.
- 7.3.4 In order to meet the identified capacity for the towns, the Council need to identify suitable sites in accordance with the sequential approach to site selection for any future development.

8.0 Hounslow Qualitative Need Assessment

8.1 Introduction

8.1.1 Following the findings of the household telephone survey and the retail market share patterns, this section provides a detailed qualitative health check assessment of the vitality and viability of Hounslow Town Centre to understand the health of the centre and assist in identifying any qualitative retail needs. It also contains an overview of existing office floorspace and the potential to accommodate additional office use within the centre.

8.2 Vitality and Viability Town Centre Health Check

8.2.1 The following health check assessment is based on the indicators published in the NPPG to assess the vitality and viability of Hounslow Town Centre. Details of the criteria within the NPPG and the methodology utilised for the health check is contained at **Appendix D**.

8.2.2 As noted in Sections 2.4 and 5.3, Hounslow Town Centre is identified in the London Plan as a Metropolitan Centre and is the Borough's largest town centre. The town centre is generally linear in form. The Adopted Local Plan town centre boundary runs from Upton Road along Staines Road which becomes High Street, along London Road to its junction with North Drive. The boundary extends to the north up Lampton Road as far as Queens Road and then runs along Balfour Road and to the north to include The Blenheim Centre. To the south it runs along Grove Road and Hanworth Road. The Experian Goad Land Use Plan (September 2017) extends slightly beyond the adopted town centre boundary and includes some additional uses to the east of the centre.

8.2.3 The western part of the High Street is pedestrianised and the eastern part is a one-way system for buses and taxis only. The main shopping facilities are located on High Street and within the Treaty Shopping Centre.

Diversity of Uses

8.2.4 We have reviewed the diversity of retail and service uses accommodated in the town centre (by number, type and quantum of floorspace) and provide our findings below. A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at **Appendix H**.

8.2.5 It should be noted that Figures 8.1 and 8.2 exclude a number of uses, including health centres, religious institutions and educational institutions (Use Class D1) as well as offices (Use Class B1). The town centre Experian Goad Plan identifies other uses to include, inter alia: office buildings; dwellings; Churches/Places of Worship; health centres; dental surgeries; advice centres; and educational establishments.

Figure 8.1: Hounslow Town Centre Diversity of Use for Commercial Units

	2017		2018		UK Average
	No.	%	No.	%	%
Convenience	41	12	38	11	9
Comparison	124	36	121	36	31
Retail Service	39	11	38	11	15
Leisure Service	80	23	86	25	24
Financial & Business Service	39	11	39	11	10
Vacant	23	7	18	5	11
Total	346	100	340	100	100

Source: Experian Goad Survey, September 2017 and May 2018.

UK average figure is at February 2018 (latest available at time of writing)

% figures may not add due to rounding

Figure 8.2: Hounslow Town Centre Diversity of Use for Commercial Floorspace

	2018		UK Average
	Sq m Gross	%	%
Convenience	18,370	19	15
Comparison	41,460	42	35
Retail Service	3,950	4	7
Leisure Service	21,120	21	25
Financial & Business Service	7,470	8	8
Vacant	4,350	4	10
Total	98,780	100	100

Source: Experian Goad Survey updated by WYG May 2018

UK average figure is at February 2018 (latest available at time of writing)

% figures may not add due to rounding

- 8.2.6 We have also undertaken a review of the health check assessments undertaken by the GLA (January 2018) and it is noted that Hounslow has similar levels of occupied floorspace (excluding offices) to other Metropolitan Centres of Harrow, Ilford and Uxbridge. The report notes that inner Metropolitan Centres (Stratford and Shepherds Bush) tend to have around 60,000sq m more commercial floorspace than the outer London Centres.

Convenience Goods

- 8.2.7 Figure 8.1 indicates that the current proportion of convenience units in the town centre (11%) is above the UK average (9%), this is replicated in the amount of floorspace at 19% compared to the UK average of 15%. The main food offer is provided by the Asda foodstore located at the Blenheim Centre which provides around 7,260sq m floorspace, the Aldi to the west on Hospital Road around 1,190sq m and Quality Foods Supermarket around 3,570sq m. The remainder of the convenience floorspace is made up through smaller convenience stores, greengrocers and specialist delicatessens and bakeries. The majority of which are independents, although national convenience retailers present within the centre include Greggs, Patisserie Valerie, Iceland, Holland and Barrett and Tesco Express.

- 8.2.8 Since 2017, the number of convenience goods units has decreased by 3 and around 640sq m gross floorspace. The centre has lost 1 butcher, 1 delicatessen and 1 grocer, all of which were independently operated. However, given the number of units and floorspace provision is still above the UK average, we do not consider the loss of these four units as a cause for concern.
- 8.2.9 The centre also contains a market held Tuesday to Saturday, it is situated on the western end of the pedestrianised part of the High Street. The market offers a variety of goods, both food and non-food, including bakery, fresh fruit, plants, arts and crafts and clothing. The market is operated by Tudor Markets who run a number of different markets and seasonal events across the UK. During our visits the market appeared to be popular.
- 8.2.10 The NEMS Household survey did not identify the market as a main reason for visiting Hounslow Town Centre, with only 0.2% of responses stating this as a top reason for visiting or 0.2% stating that they prefer to visit Hounslow Town Centre ahead of other centres as it has a good market. Improvement of the market was cited by a similar number (0.2%) of respondents as a measure to encourage them to visit the town centre. The market was not mentioned by local stakeholders in their feedback on Hounslow Town Centre.

Comparison Goods

- 8.2.11 The number of units and proportion of comparison goods floorspace within Hounslow is higher than the UK average (+5% for unit number and 7% floorspace) despite decreasing by 3 units since September 2017 (Children's wear store Mum & Me, Wow clothing and one of the Poundland stores previously located at 281-287 High Street). However, the GLA Health Check identifies that Hounslow is one of the centres who has experienced the greatest decrease in comparison retail floorspace between 2007 and 2016 with around 6,000sq m lost. When comparing to the other centres identified, Croydon has lost around 13,000sq m of comparison goods floorspace. Nearby Uxbridge has lost a similar level of comparison goods floorspace, albeit slightly higher, than Hounslow over the period.
- 8.2.12 Figure 8.3 shows that Hounslow Town Centre contains 19 of the 31 'major retailers' defined by Experian Goad. Experian consider these 'major retailers' to be key attractors and therefore most likely to improve the attraction of a centre for consumers. The 'major retailers' that are not present include John Lewis, House of Fraser, Marks and Spencer, Waitrose, Dorothy Perkins and Topshop.

Figure 8.3: Existing Major Retailers* in Hounslow Town Centre

Category	Retailers
Department	Debenhams
Mixed Goods Retailers	Boots, WH Smith, Wilkinson, Argos, TK Maxx
Supermarkets	Tesco Express
Clothing	H&M, New Look, Next, Primark, River Island
Other Retailers	Carphone Warehouse, Clarks, Clintons, EE, O2, Superdrug, Vodafone

**As defined by Experian Goad*

-
- 8.2.13 Other notable national multiple retailers in the town centre beyond those defined as Major Retailers include, Pandora, The Body Shop, Wallis, Claire's Accessories, Schuh, Blue Inc. and Select. The majority of retailers appear to be catering towards the mid-range/value market, with a limited number of higher end retailers. However, the number of charity shops within the town centre is slightly below the UK average at 1.8% compared to 2.7%.
- 8.2.14 The comparison goods offer is generally situated centrally within the town centre along High Street or within the Treaty Centre. Larger bulky goods retailers, including Harvey's and Bensons for Beds are located towards the eastern edge of the centre along High Street.
- 8.2.15 The town centre is currently experiencing significant redevelopment work at the 'Hounslow High Street Quarter site'. The redevelopment (LPA reference. 00616/F/P21) commenced in January 2018 and includes some 5,879sq m net comparison goods floorspace and around 5,000sq m leisure floorspace etc. This will strengthen the comparison goods offer of the town centre further.

Retail Services

- 8.2.16 The provision of retail service outlets is below the UK average in both unit number (-4%) and floorspace (-3%). The retail services currently represent 11% of the total retail units. When comparing with September 2017, there has been a loss of 1 hairdresser.
- 8.2.17 The majority of the retail services in the town centre are independent businesses, operating from fairly small-scale units. The largest proportion of retail service units (23) are hair and beauty salons with the remainder comprising dry cleaning, travel agents, photographer, opticians and a post office. The opticians are all national multiple operators (Specsavers, Optical Shop, Boots Opticians and Vision Express).

Leisure Services

- 8.2.18 In terms of leisure services, the number of units is roughly in line with the UK average, although in floorspace terms is slightly below (-4%). The number of leisure services has increased by 6 since 2017, and around 30sq m floorspace. Since 2017, the town centre has seen the opening of a KFC, two Indian restaurants, bistro, Turkish restaurant and coffee shop.
- 8.2.19 The centre currently contains around 54 eating establishments comprising cafes, takeaways and restaurants, this equates to around 16% of the total number of retail and leisure units which is broadly in line with the UK average (15%). The majority of the eating establishments are independent operators, although the following national multiples are present: KFC, Subway, Costa Coffee, Café Nero, Coffee Republic, McDonald's, Coffee & Muffins, Creams and Nando's. Following a review of the food and drink establishments in the town centre, it appears that a number are either takeaway establishments or provide a daytime food and beverage offer and a more limited number offer sit down facilities in the evening.

8.2.20 We understand that an element of A3/A4/A5 uses will be included within the Hounslow High Street Quarter redevelopment alongside a multi-screen cinema. The provision of a cinema within the town centre will be a boost to the leisure offer alongside the potential to increase the number of national multiple restaurant operators which the centre currently lacks. Figure 8.4 shows the Proposed Site Plan for the redevelopment.

Figure 8.4: Hounslow High Street Quarter Redevelopment Site Plan



Source: Ground Floor Retail/Residential General Arrangement Plan forming planning application submission (reference. 00616/F/P21).

8.2.21 The number of public houses is slightly below the UK average at 2% compared to 2.6%. The centre includes a JD Wetherspoon pub, alongside independent pubs and bars. The pubs and bars are generally interspersed throughout the centre, albeit The Bell, The Moon Under Water and The Snug are all situated in the west of the centre on Staines Road. Other bars/pubs are situated on Lampton Road, High Street and London Road. In terms of actual nightclubs, provision is more limited to facilities such as Club X on High Street. The number of betting offices is slightly above the UK average at 2% compared to 1%. The GLA Health Check identifies that Hounslow features in the list of 30 centres with the largest amount of night time economy floorspace, albeit it is at position 29 and falls below nearby centres of Ealing, Hammersmith and Uxbridge ranked at 10th, 13th and 14th place respectively.

8.2.22 The centre also contains 5 hotels, equating to 1.5% of the total retail and leisure services, which is above the UK average of 0.7%, suggesting that Hounslow Town Centre has a good provision of hotel and guest house accommodation. This is further supported by the GLA health check which identifies Hounslow as the fourth outer centre with the highest number of hotel bedrooms at around 500 in 2016. Three of the

five hotels are national chains, Travelodge, Ramada and Ibis Budget, supplemented by The Rosemount Hotel and The Continental. The hotels are all situated in the west of the centre, with the Travelodge, Ramada and The Continental clustered along Lampton Road and the Ibis Budget and the Rosemount on Staines Road. The hotel mix is reasonably good, with Travelodge and Ibis Budget offering budget accommodations, whilst the Ramada and The Continental offer more upmarket options.

8.2.23 The centre also contains a children's soft play area, two amusement arcades, a theatre and 4 gyms. The theatre, Paul Robeson Theatre is situated on the upper levels of the Treaty Shopping Centre as part of Hounslow Arts Centre. The centre is currently undergoing refurbishment, so only limited facilities are available and is due to hold the full programme of shows/events from Autumn 2018. The centre is also used to hold a variety of different classes including yoga, ballet, youth theatre and dance classes. Other community facilities include Montague Public Hall, Montague Road and Oshwal Shankti Community Centre towards the south of the centre on Fairfields Road. There are no other arts/cultural facilities within the centre. However, Bell Square is an outdoor events space located just off the High Street and hosts a number of different events every other Saturday throughout the summer season. The events vary and include circus, acrobats, jazz and dance performers. All of the performances are free and are often repeated numerous times throughout the day.

8.2.24 Town centre gym facilities include Anytime Fitness, Xercise 4 Less, Gold's Gym and The Gym and provide some 3,590sq m floorspace cumulatively, slightly above the UK average (3.6% compared to 2.6%). The facilities are fairly well interspersed throughout the centre with The Gym located in the north of the town at the Blenheim Centre, Anytime Fitness on upper levels of 44-52 High Street, Xercise4Less on Staines Road and Gold's Gym below The Continental Hotel on Lampton Road. In addition, a further 790sq m floorspace is provided at Kingsley Sports Hall and Leisure Centre at Prince Regent Road.

Financial and Business Services

8.2.25 The provision of financial and business services in the town centre has seen no change since September 2017. The proportion of financial and business services units is slightly higher than the current national average (at 11% compared to 10%) yet is the same in floorspace terms (8% respectively).

8.2.26 The town centre contains 12 banks/building societies comprising around 4% of the total number of retail and leisure units which is slightly above the UK average of 3%, suggesting that Hounslow is well represented by banks including national chains Barclays, Santander, Halifax, Lloyds, NatWest, Metro, HSBC, TSB and Nationwide. The centre also contains 10 estate agents (3%), yet this is slightly below the national average of 4%. In addition, there are a number of solicitors, an insurance office, a bureau de change, two pawnbrokers and other business/financial services.

8.2.27 In terms of distribution, the financial and business services (primarily national banks/building societies) are located along the High Street and are fairly central within the centre. A number of further financial and business services, including estate agents are located in the more secondary streets of the town centre (including in Kingsley Road, London Road and Bath Road).

Office Use

8.2.28 In addition to the above financial and business services, the town centre also contains a number of office facilities not included within the Experian Goad Retail/Leisure Category Report. The Hounslow Employment Land Review (ELR) 2016, prepared by Peter Brett Associates (PBA), identifies that the total office floorspace need to 2030 is 151,000sq m. The ELR notes that the office market within the borough is defined by two occupier profiles, corporate businesses who require larger offices and smaller space required by local businesses. The market for larger spaces is often focussed on campus-style development, with Chiswick Park and Bedfont Lakes as popular examples. It is also reported that there is a secondary market for larger corporate offices on the Great West Road.

8.2.29 There has been a net loss of around 5,183sq m of office floorspace in key existing office locations between 2012 and 2015 across the Borough of Hounslow, this is not broken down into town centres. Although the ELR notes that the bulk of the office losses were in non-designated areas mostly in locations just outside of town centre boundaries. The GLA Health Check identifies Hounslow as a town centre that has been particularly affected by office to residential permitted development rights, with around 40,000sq m of town centre office floorspace potentially lost, alongside Harrow and Croydon. This is supported by the monitoring data for Hounslow from 2010-2018 which identifies that there have been some significant losses within the town centre, including most notably 14,716sq m at the Hounslow Centre, 10,500sq m at the Trinity Centre, 8,175sq m at Central House, 2,135sq m at Euro House, 2,161sq m at Sovereign Court, Staines Road and 1,500sq m lost at Somerville House, Bath Road. Policy ED2 of the Adopted Local Plan identifies the borough's four town centres as Key Existing Office Locations (KEOL) which serve a strategic role in providing office floorspace. Although the ELR notes, the town centres, with the exception of Chiswick generally provide secondary accommodation. From January 2018, an Article 4 direction removing permitted development rights for change of use from B1(a) offices to residential uses (C3) was implemented for Hounslow Town Centre, alongside the other town centres of Chiswick, Brentford and Feltham.

8.2.30 The ELR assesses the net demand and office floorspace that has been lost via planning permissions/prior approvals and identify a total demand for 198,605sq m office floorspace between 2015-2030. The identified supply is 47,865sq m, with an undersupply of 150,620sq m. As a result, the borough has a major supply deficit against the predicted demands with the sum of permitted losses and outstanding prior approvals being higher than the supply. To keep the market in balance a requirement of 150,000sq m is identified by PBA, 80,000sq m to replace loss and 70,000sq m to meet future demand. To meet this demand the ELR assessed existing office clusters and potential opportunity sites, all of which are located

outside of designated town centres and within the Great West Corridor and the West of the Borough. These sites could provide up to 148,500sq m office floorspace, leaving a shortfall of around 2,000sq m. The ELR notes that the town centre boundaries should be reviewed in order to reduce further losses of office accommodation just outside of existing boundaries.

- 8.2.31 Turning to the potential for Hounslow Town Centre to provide an element of this floorspace, the Experian Goad Land Use/Plan identifies that there is around 34,590sq m of floorspace within the town centre (not included within the above Financial and Business Services category). The ELR notes that office space in Hounslow predominantly consists of older secondary office accommodation and rents are fairly low achieving an average rent of £163 per sq m. It is noted in the report that rents of this level result in refurbishment being unviable. It also identifies that Hounslow Town Centre is likely to struggle in the future as an office location, as indicated by the forthcoming Hounslow High Street Quarter redevelopment no longer including any office floorspace. However, the implementation of the Article 4 direction removing permitted development rights from office to residential floorspace highlights the Council's intention to retain office uses within the town centres alongside the objectives of Local Plan Policy ED2.
- 8.2.32 In order to assess the contribution, the existing office floorspace can make to the current/future requirements, it is recommended that the Council undertake an assessment to identify vacancy rates. As it may be that there is sufficient existing floorspace within Hounslow which could help to meet the future demand. If so, in terms of making redevelopment/refurbishment of this space viable, it is noted that the ELR makes reference to forthcoming developments and improvements within the town centre providing additional retail and leisure facilities which can help to attract companies to town centres.
- 8.2.33 In addition, development has commenced for the new shared offices for the Council, Police and Health Services alongside the Library as part of the new Civic Centre development on the corner of Bath Road and Lampton Road. This scheme will contribute to improving the appearance and services available within the town centre, albeit will not increase the amount or choice of accommodation available to the open market.

Vacancies

- 8.2.34 The number of vacant units within a centre can provide a good indication of how a town is performing. However, care should be taken when interpreting figures as vacant units will be found in even the strongest of town centres as it is to be expected that there is some 'churn' in the market with units changing representation. However, on other occasions properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or are simply not being actively marketed. Conversely, a low vacancy rate does not necessarily guarantee that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations.

8.2.35 Hounslow Town Centre currently contains some 18 vacant units, representing 5% of the total number. This is significantly below the UK average of 11%. The proportion of floorspace recorded vacant is also below the national average at 4% compared to 10%. The centre has seen a decline in 5 vacant units since September 2017 and around 3,420sq m.

Figure 8.5: Vacancies in Hounslow Town Centre

2014		2017		2018		UK Average %
No.	%	No.	%	No.	%	No.
33	9	23	7	18	5	11

Source: LBH Town Centre Health Check 2014, September 2017 Experian Goad Survey and updated by WYG May 2018

UK average figure is at February 2018

% figures may not add due to rounding

8.2.36 We have also undertaken a review of the number of vacant units with the Council's Health Check of the town centre undertaken in December 2014. Since this time the number of vacant units has significantly declined (by 15). The decline in the number of units is positive and suggests an improvement in the health of the centre over the last few years. Although it is noted that the current vacancy rate recorded does not include units currently undergoing refurbishment.

8.2.37 The vacant units vary in size with only one being over 1,000sq m, at the Blenheim Centre (1,230sq m). The remainder of the vacant units are all below 400sq m with the exception of 281-287 High Street at 510sq m. The vacant units are generally well dispersed throughout the centre, although there are a number located on the upper floors of the Treaty Centre. The location of vacant units within the town centre is identified by the plan provided at **Appendix H**.

8.2.38 Despite the above assessment indicating positive findings in terms of vacancy rates. The GLA health check identifies Hounslow as one of the town centres with the highest vacancy rate, suggesting when comparing with other London Town Centres Hounslow's vacancy rate is not as healthy as some. It is also interesting to note that the GLA state that that retail vacancy rates for Major and District centres are higher on average than within International and Metropolitan centres. This has not been found within this assessment, with the other centres within the borough (Major and District Centres) having lower vacancy rates at present than the Metropolitan Centre of Hounslow.

Operator Requirements

8.2.39 In assessing the health of centres, it is also relevant to consider which retail operators may be intending to seek representation in Hounslow Town Centre in the future. 'The Requirements List' sets out requirements for additional floorspace in particular town centres. It should be noted that each retailer will have particular size, layout and format requirements and that some operators may not have specifically identified town centre representation, instead targeting regions or even nationwide expansion. Whilst 'The Requirements List' principally records the requirements of high street multiple operators, it is of relevance in identifying the type and broad number of operators currently seeking representation.

'The Requirements List' identify a total of 25 retail/leisure operators currently seeking premises in Hounslow.

Figure 8.6: Registered Requirements, Hounslow

Name	Minimum Size (sq m)	Maximum Size (sq m)
Retail/Services		
Lidl	929	2,787
Savers	140	278
Bensons for Beds	232	696
Sainsbury's Local	232	1,115
Cigara	23	74
Paramount Fine Foods	23	420
Five Pound World	185	464
Tapi Carpets	464	929
Pavers	232	372
Priority Plumbing	232	325
Mail Boxes etc	28	46
Leisure (incl. Food & Drink)		
GDK	116	232
Habit Burger	185	277
Fat Burger	140	232
KFC	167	325
Chip Nation	28	140
Second Cup	92	140
City Slots	74	140
Snap Fitness	372	929
Other		
Vets4Pets	140	185
Dentix	185	372
National Tyres and Autocare	232	464
Shuropody	92	185
Easistore	1,115	2,787

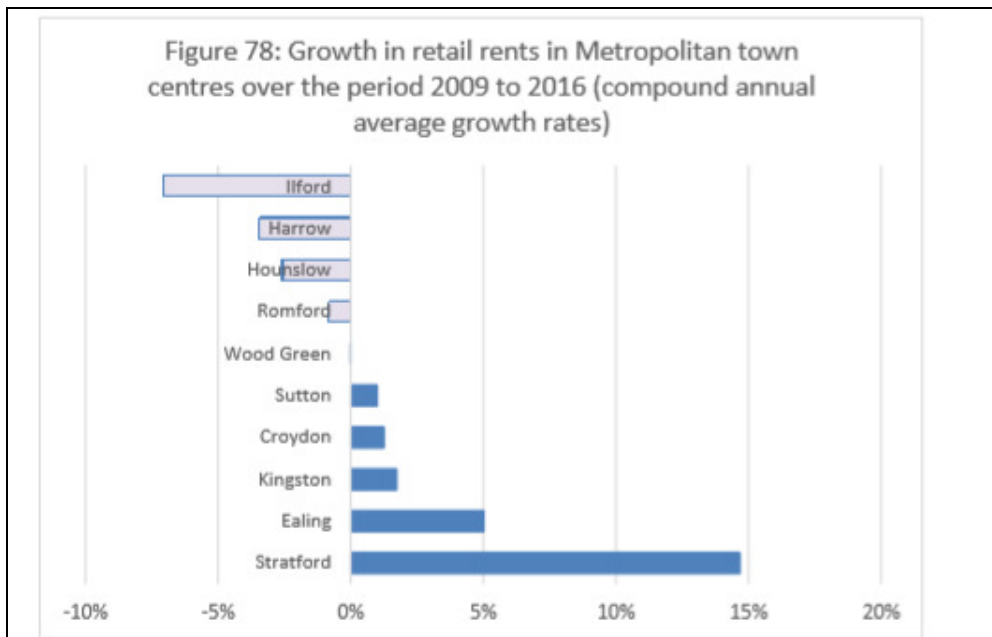
Source: 'The Requirements List', June 2018

- 8.2.40 The above suggests that there is a good level of demand from retail and commercial leisure operators seeking representation in Hounslow. However, of the above list only 5 are comparison goods retailers and none offer clothing/footwear products.

Commercial Rents

- 8.2.41 The level of commercial rent which retail operators pay for presence in a town/city is an indication of the perceived strength of the centre. The GLA Health Check notes that Hounslow has witnessed a decrease in retail rents over the period 2005 to 2016, between 2 and 3%. Whilst the nearby centres of Ealing and Hammersmith have seen an increase of around 5% and 4% over the same period. Figure 8.7 shows the growth decline in retail rents in Metropolitan Centres over the more recent period from 2009 to 2016.

Figure 8.7: Retail Rents Growth



Source: GLA Health Check (January 2018)

Pedestrian Flows

8.2.42 During our surveys the centre was busy and appeared to be popular with shoppers. Strong levels of pedestrian activity were monitored along the centre of High Street and at the Blenheim Centre. Good levels of footfall were also monitored along the western part of High Street, London Road and Kingsley Road in the vicinity of the station. Lower levels of footfall were recorded to the south and western periphery of the centre. Reasonable levels of footfall were monitored within the Treaty Shopping Centre, albeit this declined significantly on the upper floors of the centre, which is not surprising given the higher vacancy rates on the upper floors.

Accessibility

8.2.43 The accessibility of a centre is determined by the ease and convenience of access by a choice of means of travel – including that which is provided to pedestrians, cyclists and disabled people – and the ease of access from the main arrival points to the principal attractions in the centre.

8.2.44 Hounslow Town Centre benefits from a bus and underground station situated in proximity to each other to the east of the centre on Kingsley Road. Hounslow East underground station is located within Zone 4 on the tube network and is situated on the Piccadilly line providing frequent and direct services to Cockfosters, Arnos Grove, Acton Town and Heathrow.

8.2.45 Hounslow Bus Station and nearby stops provide a number of bus services to Kingston, Bulls Bridge, Ealing Broadway, White City, Richmond and Isleworth. Bus stops are situated in the centre along the eastern part of High Street, London Road, Hanworth Road, Staines Road and Bath Road.

- 8.2.46 Hounslow Central Rail Station is situated to the south of the centre approximately 0.5 miles away and provides rail services to Waterloo and Weybridge via Richmond, Brentford, Twickenham, Putney and Staines, Feltham, Virginia Water and Chertsey.
- 8.2.47 In terms of cycling, bicycle parking is generally readily available throughout the centre, at Asda, different points along the High Street and London Road. During our visits, the cycle parking was fairly well used, particularly along the High Street and there were a number of cyclists in the area.
- 8.2.48 Accessibility by car is via Bath Road, Staines Road or the A315 London Road. The A4 Great West Road runs to the north of the town centre. Car parking is provided towards the edge of the centre at the following locations in Figure 8.8.

Figure 8.8: Main Central Car Parks in Hounslow Town Centre

Car Park Location	Spaces
Central House, Lampton Road	82
Montague Road	30
Staines Road Retail Park	105
Staines Road	30
Bell Road	80
Bell Road multi-storey (above Wilko)	700
Hanworth Road	70
Blenheim Centre multi-storey	320
Prince Regent Road	80
School Road	180

**As defined by Experian Goad*

- 8.2.49 It is noted that the NEMS household survey identified that 51% of respondents travel to Hounslow via car. However, only 3% felt that Hounslow Town Centre was easy to get to by car and less than 1% felt it was easy to find a parking space. Instead 10% of respondents stated that making more parking spaces available would encourage them to visit Hounslow Town Centre more often.

Perception of Safety

- 8.2.50 Hounslow Town Centre benefits from a CCTV network, with cameras covering car parks, main shopping streets and centres. The CCTV network monitors a number of incidents across the town centre and helps to cut down on crime and traffic offences.
- 8.2.51 The local policing team, Hounslow Town Centre recently organised a crime prevention day within the town centre and promoted the new Online Watch Link (OWL). The aim of the OWL is to keep communities safe, reduce crime and keep people informed of what is going on locally. It is a shared, secure platform for the public and local authorities to maximise the potential of neighbourhood watch schemes.
- 8.2.52 We have also undertaken a review of the Metropolitan Police crime map and statistics, which identified 191 crimes were recorded in April 2018 in the town centre. It appears that the majority of incidents recorded took place in/around the Treaty Centre and Bell Road between High Street and Lampton Road.

Of the 191 incidents, violent and sexual offences accounted for 21%, anti-social behaviour was 19%, shoplifting 17% and other theft 9%. Over the last year the crime rate has varied from 270 incidents recorded in December 2017 to 191 in April 2018, representing the lowest number recorded during this period. The figures are higher than those for Chiswick, Brentford and similar to the recent records for Feltham.

8.2.53 The NEMS household survey identified that around 8% of respondents would visit Hounslow Town Centre more often if there were better security/safety measures in place. During our visits, the town centre generally felt safe, albeit this was during daylight hours when there were a number of shoppers and workers within the town centre.

Views and Behaviour

8.2.54 Utilising the NEMS survey we have been able to obtain information on the main reasons why respondents visit Hounslow Town Centre, why they prefer to visit Hounslow ahead of other centres and what, if any, measures would encourage them to visit the centre more often.

8.2.55 Figure 8.9 below identifies that the main reason/s why respondents visit Hounslow Town Centre is for non-food shopping (65%) and food shopping (52%). After this, some 7% of respondents identified the main reason/s to visit the town centre was to visit financial services and 6% said for a day out/window shopping and 5% said to visit cafes/restaurants.

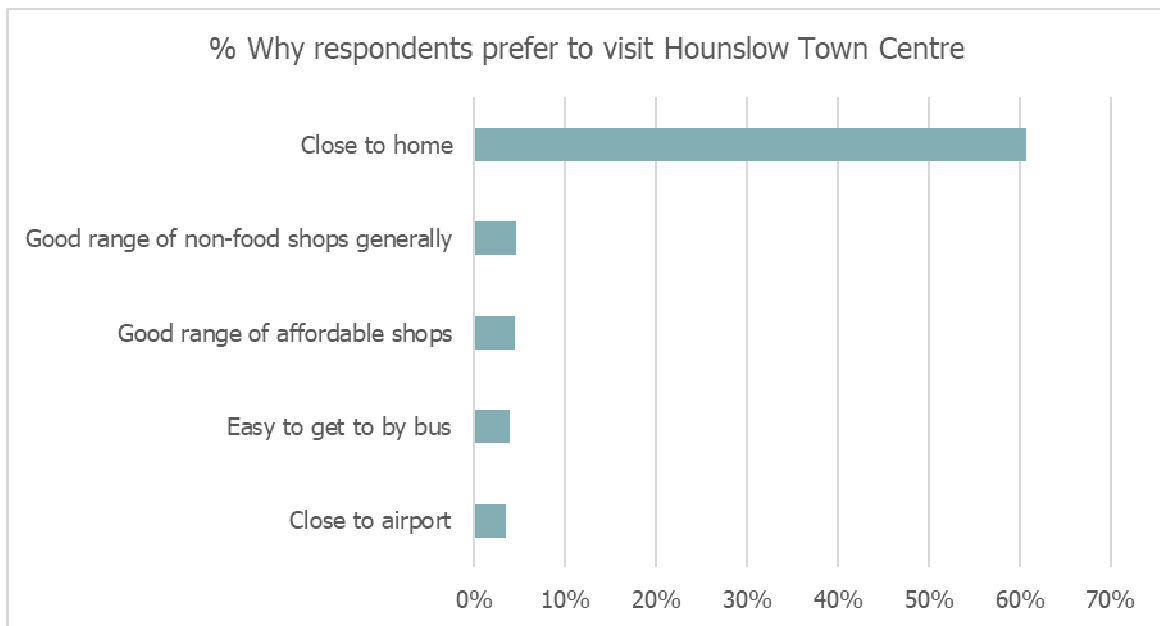
Figure 8.9: Main Reason for Visiting Hounslow Town Centre



Source: Q22a, and 22b (1st & 2nd mention combined), NEMS Household Survey (May 2018)

8.2.56 Respondents were also asked why they prefer to visit Hounslow Town Centre, the top responses presented at Figure 8.10.

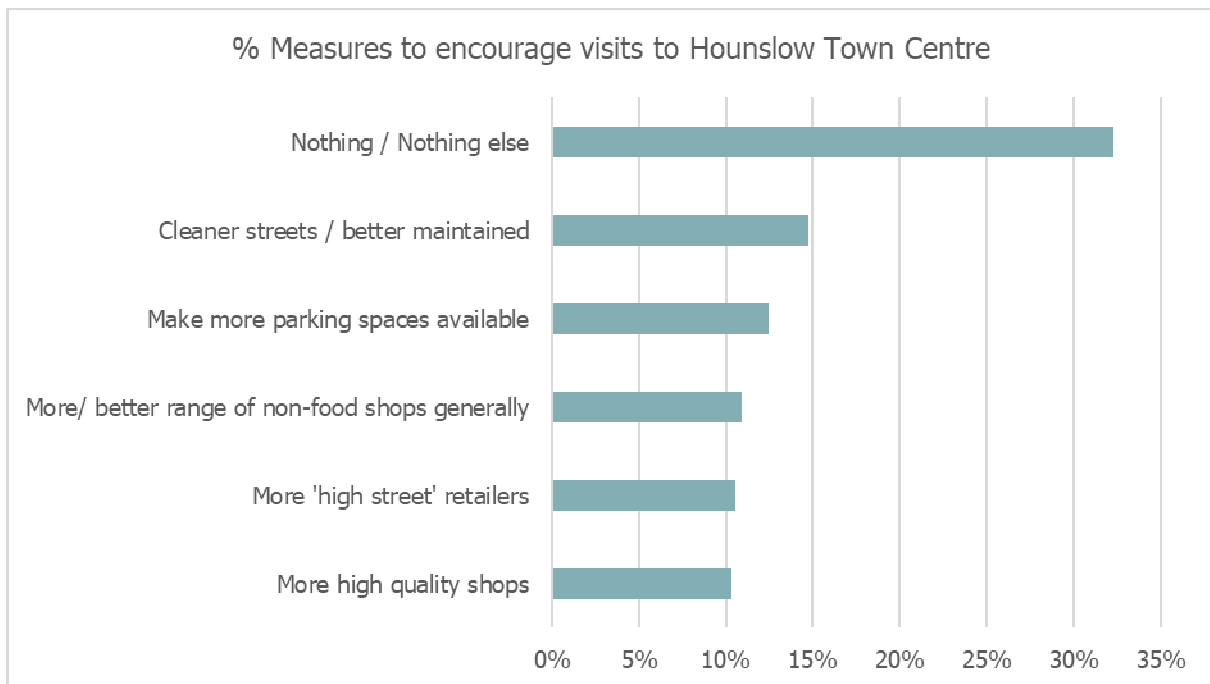
Figure 8.10: Why respondents prefer to visit Hounslow Town Centre



Source: Q23a, and 23b (1st & 2nd mention combined), NEMS Household Survey (May 2018)

- 8.2.57 Figure 8.10 identifies that the majority of respondents (61%) prefer to visit Hounslow Town Centre as it is close to home. The remainder of reasons provided include: it has a good range of non-food shops (5%); a good range of affordable shops (4%); easy to get to by bus (4%) and close to the airport (3%).
- 8.2.58 The survey also asked what measures would encourage respondents to visit Hounslow Town Centre more frequently. Figure 8.11 details the top responses.

Figure 8.11: Measures to encourage visits to Hounslow Town Centre



Source: Q24a, and 24b (1st & 2nd mention combined), NEMS Household Survey (May 2018)

8.2.59 The top measure provided which would encourage respondents to visit Hounslow Town Centre was cleaner/better maintained streets at 15%, this was followed by providing more parking spaces (12%). Respondents then considered that improvements to the range of shops would encourage them to visit more often, with 11% saying more/better non-food shops and more 'high street' retailers and 10% stating more high-quality shops. Of all of the responses, 32% of respondents indicated that nothing would encourage them to visit more often.

8.2.60 In terms of our engagement with key stakeholders, a number of views on Hounslow Town Centre were raised:

- There is an oversupply of existing retail units.
- There are a number of units which are let to 'down-market' retailers making the centre unattractive to consumers with higher disposable incomes.
- The centre currently lacks a strong leisure/cultural offer.
- Refurbishment of tired shopfronts would help to improve the appearance of the centre.

8.2.61 The full summary of feedback obtained is at **Appendix B**.

Town Centre Environmental Quality

- 8.2.62 The environmental quality of the town centre is generally considered to be adequate. Shop fronts are of a mixed quality, many being in good condition along the central part of High Street. Some of the shopfronts, particularly at the outer edge of the centre are in need of some improvement. There are a small number of listed buildings within the town centre, yet a limited number of historic shopfronts are evident.
- 8.2.63 The town centre provides some street furniture, particularly along the pedestrianised part of High Street including lighting, seating, planting and trees which creates a leisurely shopping environment. Towards the east of the centre, the environmental quality is in part marred by the through traffic using London Road. Whilst there are pedestrian crossing facilities these are spaced out making navigating the street difficult for pedestrians at times.
- 8.2.64 The pedestrian links between the town centre and The Blenheim Centre are not presently strong, yet we understand these are to be improved through the Hounslow High Street Quarter redevelopment.

Summary

- 8.2.65 Overall, Hounslow Town Centre is considered to display reasonably good levels of vitality and viability. In particular, the centre has a low and improving vacancy rate. It also has a higher than average comparison offer including a number of national retailers. The food and drink offer within the centre has improved slightly over the last year, in line with the national trends and the centre has a good provision of financial and business services, in particular banks. Availability of car parking, more non-food shops and improved safety/security were raised as measures to improve frequency of visits to the town centre. The quality of the environment is adequate although some shopfronts could benefit from improvement.

8.3 Qualitative Need Summary

- 8.3.1 Based on the health check of the centre, relevant market share patterns and the role and function of each centre, we summarise the qualitative need for additional retail and town centre uses below.

Convenience Goods

- 8.3.2 The quantitative assessment identifies that the majority of foodstores in Hounslow are overtrading, despite there being a higher than UK average proportion of convenience floorspace. In addition, food shopping is currently the main reason for visiting Hounslow Town Centre for around 52% of respondents. Yet Hounslow only retains around 36% of main food shopping trips from its principal zone (Zone 4), with the majority travelling to Feltham. Thereby suggesting that Hounslow could benefit from additional facilities.

8.3.3 However, given the existing convenience goods provision we do not consider that there is a qualitative need for additional convenience goods floorspace within the centre. Some small-scale convenience floorspace could be provided within the centre to offer additional choice.

Comparison Goods

8.3.4 Turning to comparison goods, the health check assessment identifies that there is a higher than UK average proportion of comparison goods units and floorspace. Nevertheless, as identified by the household survey and stakeholder engagement responses, the town centre could benefit from additional comparison goods retail floorspace to offer a greater variety of clothes and other comparison goods.

8.3.5 As identified in Section 8.2, the forthcoming Hounslow High Street Quarter redevelopment will provide around 11,199sq m additional retail floorspace, a significant proportion of which is understood to be occupied by comparison goods retailers. On this basis, we consider that this redevelopment will meet the current qualitative need.

Other Main Town Centre Uses

8.3.6 The retail services in the town centre are currently below the UK average with the majority of services comprising hair and beauty salons. Nevertheless, the centre does still benefit from a post office alongside other services such as opticians, travel agents and dry cleaning. Whilst the variety of services could be improved, and diversity of services encouraged, there is not considered to be a qualitative need for further retail services.

8.3.7 In terms of leisure services, the health check identifies that the proportion of leisure units is generally in line with the UK average, yet in floorspace terms is slightly below it. It also identifies that the majority of food and drink uses presently operating within the centre are takeaway establishments or provide a daytime food/drink offer. However, the redevelopment of Hounslow High Street Quarter will improve the existing leisure offer with an element of A3/A4/A5 floorspace proposed alongside a multi-screen cinema. On this basis, we do not consider there is a qualitative need to plan for any additional A3/A4/A5 or cinema uses in the town centre.

8.3.8 Based on our high-level review of hotel provision, there is no obvious deficiencies. This is supported by the GLA health check which identifies Hounslow as the fourth outer centre with the highest number of hotel bedrooms at around 500 in 2016.

8.3.9 Turning to financial and business services, the centre is currently generally well represented, with both unit number and floorspace being in line with the UK average. The town also has a strong provision of national banks, as identified in the NEMS household survey, with around 7% of respondents indicating the main reason for visiting the centre being to utilise a financial service. On this basis, the health check assessment supported by the survey results do not suggest there is a qualitative need for additional financial and business services.

8.3.10 In terms of other office uses, the Experian Land Use Goad Plan suggests there is around 30,000sq m of office floorspace within the centre, although it is noted that the ELR identifies much of this is of secondary quality space. The ELR also identifies that there is limited demand for office accommodation within Hounslow Town Centre, there has also been a high take up of office to residential permitted development rights reflecting the limited demand. However, the office provision needs to be carefully monitored to ensure an appropriate level of supply is available, the introduction of Article 4 direction removing permitted development rights from office to residential use can help to achieve this.

9.0 Chiswick Qualitative Need Assessment

9.1. Introduction

9.1.1 This section of the study contains the qualitative health check assessment of the vitality and viability of Chiswick Town Centre to understand the health of the centre and assist in identifying any qualitative retail needs. In addition, an overview of existing office floorspace and the potential to accommodate additional office use within the centre is provided.

9.2. Vitality and Viability Town Centre Health Check

9.2.1 As per Hounslow, the health check assessment is based on the indicators published in the NPPG to assess the vitality and viability of Chiswick Town Centre. **Appendix D** contains the details of the methodology.

9.2.2 Chiswick Town Centre is classified as a Major Centre within Policy TC1 of the Adopted Local Plan. The town centre is linear in form running along Chiswick High Road, from its junction with Chiswick Road in the west to its junction with Upham Park Road to the east. To the north it extends along Turnham Green Terrace to the railway line and Turnham Green station.

Diversity of Uses and Retailer Representation

9.2.3 The retail composition of the town centre by unit number and floorspace terms is provided in Figures 9.1 and 9.2 below.

Figure 9.1: Composition of Retail/Leisure Units in Chiswick Town Centre

	2017		2018		UK Average
	No.	%	No.	%	%
Convenience	40	10	39	10	9
Comparison	134	35	132	35	32
Retail Service	60	15	65	17	14
Leisure Service	91	23	91	24	24
Financial & Business Service	38	10	38	10	11
Vacant	27	7	12	3	11
Total	383	100	377	100	100

Source: Experian Goad Survey, June 2017 and May 2018.

UK average figure is at February 2018 (latest available at time of writing)

% figures may not add due to rounding

Figure 9.2: Chiswick Town Centre Diversity of Use for Commercial Floorspace

	2018		UK Average
	Sq m Gross	%	%
Convenience	11,340	20	15
Comparison	18,620	33	35
Retail Service	6,170	11	7
Leisure Service	13,700	25	25
Financial & Business Service	5,050	9	8
Vacant	1,160	2	10
Total	65,290	100	100

Source: Experian Goad Survey updated by WYG May 2018

UK average figure is at February 2018 (latest available at time of writing)

% figures may not add due to rounding

Convenience Goods

9.2.4 As identified in Figure 9.1, there are 39 convenience units in the town centre, representing 10% of the total units which is just above the UK average (9%), the proportion of floorspace is higher at 20% compared to 15%. The town centre includes a Sainsbury's foodstore (5,010sq m), Marks and Spencer Simply Food (1,090sq m) and a Waitrose (960sq m) alongside a number of smaller convenience stores, delicatessens, health food stores, butchers, bakers and grocers. The centre includes a good mix of independents and national retailers, including Greggs, Le Pain Quotidien, Holland and Barrett and Tesco Express. There has been a loss of one convenience goods unit (bakery) since June 2017.

Comparison Goods

9.2.5 There are 132 comparison goods units within Chiswick Town Centre which represents 35% of the total retail/commercial units, this is slightly above the current UK average of 32%. In floorspace terms, there is a lower proportion (33%) of comparison goods floorspace than the national average (35%). There has been a loss of two comparison goods units and some 860sq m floorspace since June 2017. The GLA Health Check (January 2018) report notes that Chiswick has seen a loss in the total occupied floorspace (excluding offices) over the period 2007-2016.

9.2.6 Of the comparison goods units, 32 offer clothing and footwear representing 7% of the total units, which is in line with the UK average. In terms of major retailers, Figure 9.3 identifies that Chiswick Town Centre contains 11 of the 31 'major retailers' defined by Experian.

Figure 9.3: Existing Major Retailers* in Chiswick Town Centre

Category	Retailers
Department	-
Mixed Goods Retailers	Boots, WH Smith,
Supermarkets	Sainsbury's, Waitrose, Tesco Express
Clothing	-
Other Retailers	Carphone Warehouse, Clarks, EE, O2, Vodafone, Waterstones

*As defined by Experian Goad

9.2.7 However, it is worthwhile noting that Chiswick Town Centre contains a number of other national retailers, many of which are upmarket fashion brands, including Phase Eight, Oliver Bonas, Jigsaw, Sweaty Betty, Mint Velvet and Whistles. Turning to other comparison goods, other national multiple retailers, in addition to those in Figure 9.3, comprise Carpetright, Ryman, Paperchase, Farrow & Ball and Cowshed. These are supplemented by a range of independent retailers offering fashion, furniture, household accessories and chemist products. The number of national retailers has increased by two since June 2017, this is not a significant increase and does not appear to be at the expense of the independent offer provided by the town centre.

9.2.8 The centre contains 13 charity shops comprising 3% of the total number of retail units and is in line with the UK average. Stakeholders identified that there has been an increasing number of charity shops opening recently. A high proportion of charity shops can be a sign of decline, particularly where these uses are located in prime locations. In the case of Chiswick Town Centre the charity shops are generally interspersed with around half of the units located along Turnham Green Terrace. We do not consider that provision of charity shops suggests the centre is in decline.

Retail Services

9.2.9 The number of retail service units (17%) is slightly above the UK average (15%) and has increased by 5 units since June 2017, in line with the trend seen nationally in this sector. These services now represent 11% of the total floorspace of commercial outlets which is 4% higher than the national average.

9.2.10 Of the retail services, the majority (37 units) comprise health and beauty services including hairdressers and beauty salons which comprise 10% of the total units and is just above the UK average of 9%. There is a high proportion of dry cleaners within the centre (2%) when compared to the UK average of 1%, suggesting that there is a higher than average demand for such services in the local area.

9.2.11 Other retail services available within the centre include opticians (9), dog groomers (2), undertakers (2), car repairs (2), clothing alterations and a Post Office.

Leisure Services

9.2.12 When reviewing the leisure services available within the centre, it is interesting to note that there has been no change in the number of units providing leisure services in the last 11 months. The current proportion of leisure units and floorspace is identical to the UK average at 24% and 25% respectively.

9.2.13 Over 2/3 of the leisure services comprise food and drink uses (75 units), comprising 20% of the total retail/leisure units within the town centre, which is above the national average of 15%. Of the food and drink uses, 5% are cafes/coffee shops, comparable to the UK average, 11% are restaurants offering a variety of different cuisines, which is double the UK average of 5% and 3% are takeaway establishments, which is substantially lower than the UK average of 6%. The under provision of takeaway establishments when compared to the UK average is not necessarily a bad thing as fast food and takeaway outlets can

often negatively impact on the environmental quality/appearance of a town centre. There is not considered to be a qualitative deficiency in terms of takeaway outlets. Around a third of the food and drink units within the town centre are national multiples including Carluccio's, Byron Burger, Bills, Pizza Express, Zizzi, Crepe Affaire and Starbucks, with the remainder being independently/locally operated.

- 9.2.14 Turning to bars and public houses, the centre contains 10 such units comprising 3% of the total retail/leisure units. This is below the UK average of 4% yet is not considered a cause for concern.
- 9.2.15 Chiswick Town Centre contains two health/sports facilities, neither of which are large scale commercial gyms or fitness centres, instead they are smaller establishments offering specialist fitness classes. The centre does not contain a cinema but does have a theatre. The Tabard Theatre is located on Bath Road and shows a variety of different theatre and comedy performances. The centre also only contains 1 hotel, the High Road House Hotel, offering only 14 bedrooms. On this basis and given the lack of traditional hotel/guest house accommodation available to the open market, there appears to be a qualitative deficiency in hotel provision within Chiswick Town Centre.

Financial and Business Services

- 9.2.16 There are 38 financial and business services identified within the town centre, comprising 10% of the total unit number and 8% of the total floorspace. The proportion of units and floorspace is comparable with the UK averages at 10% and 9% respectively, suggesting that the centre provides a good amount of financial and business services to local residents.
- 9.2.17 However, the majority of these units are estate agents (6%), which is higher than the national average of 4%. This was raised by stakeholders who felt that the high street is becoming dominated by estate agents, in particular reference was made to Turnham Green Terrace having a high concentration of estate agents. The recent survey indicates 8 estate agents are located on Turnham Green Terrace, an increase of 1 since June 2017, with the remainder (16) currently located elsewhere in the centre. There are 8 banks/building societies, all of which are national operators: HSBC, Natwest, Lloyds, Santander, Halifax, Barclays, Metro Bank and Nationwide. The proportion of banks (2%) is slightly below when comparing with the national average (3%). The centre also contains 3 solicitors and 2 employment agencies.

Office Uses

- 9.2.18 Turning to office space not included within the above financial and business services, the Experian Goad Land Use Plan identifies that there is approximately 2,990sq m floorspace in office use.
- 9.2.19 As identified in Section 8.2, the Employment Land Report (ELR) prepared for Hounslow Borough Council identifies there is currently a shortfall of office floorspace against projected requirements to 2030. However, unlike Hounslow Town Centre, Chiswick has a very successful and healthy office market. The GLA Health Check Report (January 2018) noted that high office rates are found in Chiswick, with Grade A

office rents in the region of £500 to £650 per sq m, reflecting the strength of the area as an office location. The ELR specifically refers to the attractiveness of Chiswick Park due to the modern office space available, suburban location, close to and with good public transport links to London and Heathrow airport and the campus style environment providing a number of on-site amenities. Chiswick Park is located just to the west of Chiswick Town Centre. The ELR identifies that opportunities for new campus style developments similar to Chiswick Park would be viable and likely perform well in Chiswick, yet it is acknowledged that large sites are needed to accommodate such schemes.

9.2.20 Turning to the town centre, the GLA report identified that Chiswick was the 14th town centre with the most office floorspace potentially lost through office to residential permitted development rights. Monitoring data over the period 2010 to 2018 identifies loss of town centre office floorspace of around 1,100sq m at Swan Business Centre, Fisher Lane, 855sq m at Windmill Lane, 732sq m at Conduit House and 590sq m at 147 Chiswick High Road. However, whilst there is demand for some smaller modern, 'edgy space' within Chiswick Town Centre, the ELR notes that the Barley Mow Centre and Light Box currently have around 239sq m of available office space. However, rents for this range from £402 to £741 per sq m and many new small businesses cannot afford them. As a result, the space remains unoccupied and developers are not willing to bring forward town centre office refurbishment.

9.2.21 In January 2018, the Council removed the permitted development rights for change of use from office to residential within Chiswick Town Centre through the implementation of an Article 4 direction. This should help to reduce the loss of further office accommodation in the town centre. In addition, the Council should seek to promote new mixed-use developments which incorporate an element of office floorspace alongside other uses in order to make the development viable. An assessment of occupation of existing space and refurbishment of available space should also be promoted where feasible, and the contribution (2,990sq m) this space could make to the office requirements should not be overlooked.

Vacancies

9.2.22 Chiswick Town Centre has a low vacancy rate and currently contains only 12 vacant units, representing 3% of the total number. This is significantly below the UK average of 11%. The proportion of floorspace recorded vacant is also substantially below the national average at 2% compared to 10%. The centre has seen a significant improvement in the number of vacant units since June 2017 with a reduction of 16 units and around 2,060sq m floorspace.

Figure 9.5: Vacancies in Chiswick Town Centre

2014		2017		2018		UK Average %
No.	%	No.	%	No.	%	No.
18	5	27	7	12	3	11

Source: LBH Town Centre Health Check 2014, June 2017 Experian Goad Survey and updated by WYG May 2018
UK average figure is at February 2018

% figures may not add due to rounding

The vacancy rates do not include units within Empire House or Conduit House given the redevelopment schemes proposed.

9.2.23 The vacant units are generally small in size with the largest being 300sq m (Chiswick High Road, adjacent to Dukes Avenue). The second largest is 12 Turnham Green Terrace at 200sq m, then 1-3 Turnham Green Terrace at 110sq m and 261 Chiswick High Road and unit at Barley Row Passage each measuring 100sq m. The remainder of the vacant units are all below 100sq, between 40-90sq m. The vacant units are generally well dispersed throughout the centre, although there are a number located on the southern side of Chiswick High Road between Dukes Road and Heathfield Terrace. The location of vacant units within the town centre is identified by the plan provided at **Appendix H**.

Operator Requirements

9.2.24 Following review of 'The Requirements List', there are a total of 43 retail/leisure operators currently seeking premises in Chiswick.

Figure 9.5: Registered Requirements, Chiswick

Name	Minimum Size (sq m)	Maximum Size (sq m)	Name	Minimum Size (sq m)	Maximum Size (sq m)
Retail/Services					
Lidl	929	2,787	Supercuts	56	70
One World	232	465	Mind	79	139
Oasis	92	185	Revital	74	102
Jones Bootmaker	111	232	Regional Estate Agent	65	111
Happy Socks	14	46	Topps Tiles	232	743
British Heart Foundation (Clothing)	74	140	Topps Tiles Boutique	65	140
British Heart Foundation (Furniture & Electrical)	464	743	European Optical Chain	74	84
Bensons for Beds	232	696	Tapi Carpets	464	929
Between The Lines	79	158	Metropolitan Safe Deposits	371	650
Vapejoy	23	37	Wooden Floor Store	116	232
We Brought Beer	37	74	Pets At Home	325	557
Leisure (incl. Food & Drink)					
Steak N' Shake	140	280	Coffee Republic	102	149
Fat Burger	140	232	Caffe Nero	88	185
Five Guys	232	372	Chip Nation	28	140
Fego Cafe	93	418	Second Cup	92	140
Veeno	70	185	Orangetheory Fitness	232	464
Brunning & Price	418	464	My Gym	232	372
Sushi Shop	65	139	EasyHotel	1,394	3,716
Wayne's Coffee	56	163	Hub Hotel	1,486	9,290
Suda	232	264	Travelodge	929	3,716
Other					
Vets4Pets	140	185	Easistore	1,115	2,787
Dentix	185	372			

Source: 'The Requirements List', June 2018

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- 9.2.25 The above suggests that there is a healthy level of demand from retail and commercial leisure operators seeking representation in Chiswick. Given the current hotel offer within the centre is low, it is also positive to note that there is demand from hotel operators

Pedestrian Flows

- 9.2.26 During our visits the centre was busy and generally high levels of footfall were evident throughout. Strong levels of pedestrian activity were monitored along the majority of Chiswick High Road, particularly on the northern side and along Turnham Green Terrace. Lower levels of footfall were recorded at the east and western periphery of the centre. Reasonable levels of footfall were monitored on the southern side of Chiswick High Road, yet it was not as high as the opposite side of the road, despite there being a number of crossing points.

Accessibility

- 9.2.27 In considering the accessibility of Chiswick Town Centre, it is noteworthy that Turnham Green and Chiswick Park underground stations are located at the edge of the centre. Both stations are on the District and Piccadilly lines and provide services to Ealing Broadway, Upminster, Wimbledon and Heathrow as well as into central London.
- 9.2.28 Gunnersbury Rail Station is situated approximately 0.3 miles to the west of the town centre providing overground rail services to Richmond and Stratford via Kew Gardens, Acton Central, Hampstead Heath and Camden Road.
- 9.2.29 There are also a number of bus stops situated throughout the centre, along Chiswick High Road, Turnham Green Terrace and Acton Lane providing various and regular services to the surrounding area and central London, including Chiswick Park, Brentford, Hounslow West, Fulwell, Hammersmith, White City and Grove Park.
- 9.2.30 Cycle parking is available throughout the centre, at different points along Chiswick High Road, Turnham Green Terrace and at Sainsbury's foodstore. The cycle parking was very well used during our visits and in particular near underground stations.
- 9.2.31 Chiswick is located to the east of the Circular Road and north of Great West Road/Cedars Road for accessibility by car. Car parking is available on street at various points throughout the centre at the following locations in Figure 9.6.

Figure 9.6: Main Central Car Parks in Chiswick Town Centre

Car Park Location	Spaces
Euro Car Parks, Sainsbury's	320
Euro Car Parks, Common Road	10
Common Road	30
Windmill Road	54
Chiswick High Road Car Park	80

As defined by Experian Goad and using online sources.

- 9.2.32 The centre also contains electric charging points at Sainsbury's car park and on-street car parking spaces at Linden Gardens.
- 9.2.33 The NEMS household survey identified that only 29% of respondents travel to Chiswick via car, with 48% walking and 15% getting the bus. No respondents reported that Chiswick Town Centre was easy to get to by car and 12% said more car parking spaces would encourage them to visit the town centre more often.

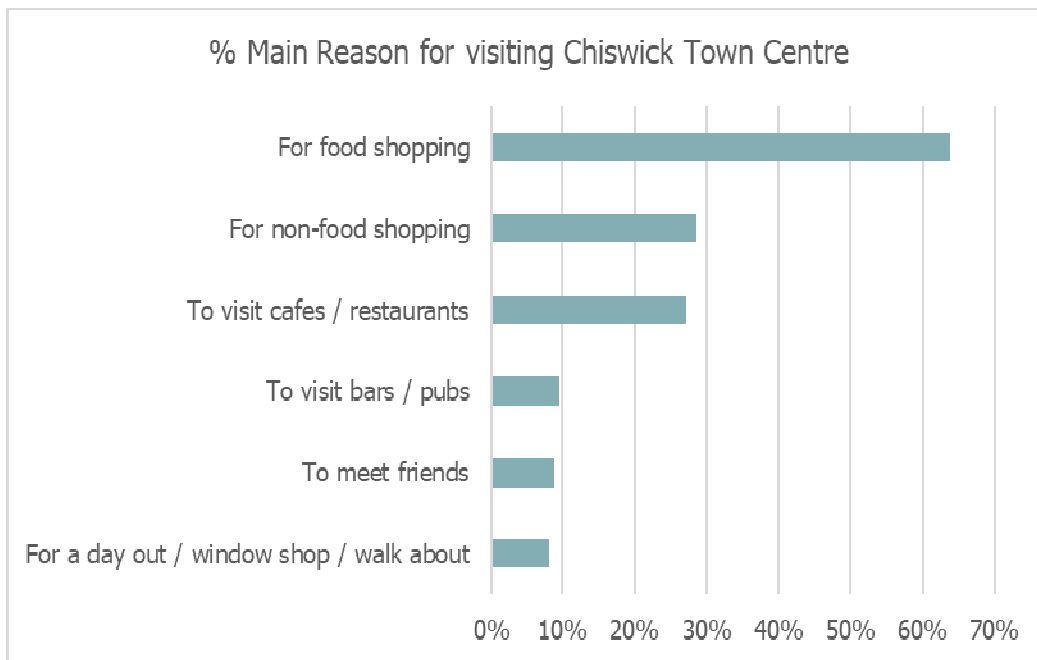
Perception of Safety

- 9.2.34 We understand that the town centre benefits from some CCTV coverage and at Turnham Green station in an attempt to reduce crime related incidents.
- 9.2.35 Following a review of the Police Crime Map, crime levels for the area (Turnham Green neighbourhood) it is important to note that this does not cover the entire centre)) average between 100-200 crime activities per month between May 2017 and April 2018. The most common criminal activity recorded is vehicle crime (20%), followed by anti-social behaviour (19%), followed by violence and sexual offences (14%). Around 9% of recorded crime between May 2017-April 2018 was shoplifting. When compared to Hounslow is around 50-100 lower crime occurrences per month.
- 9.2.36 In terms of the residents' perception of safety within Chiswick Town Centre, the NEMS household survey identified that around only 3% of respondents would visit the town centre more often if there were better security/safety measures in place, suggesting that users of the town centre feel safe. This supports our own perception of the centre where there was limited evidence of graffiti or vandalism.

Views and Behaviour

- 9.2.37 We have utilised the NEMS survey to obtain information on the main reasons why respondents visit Chiswick Town Centre, what they most liked about it and what, if any, measures would encourage them to visit the centre more often.
- 9.2.38 Figure 9.7 identifies that the main reason/s why respondents visit Chiswick Town Centre is for food shopping (64%) and non-food shopping (29%). Visiting cafes and restaurants was the main reason provided by 27% of respondents, following by visiting bars/pubs (10%), to meet friends (9%) and for a day out/window shopping (8%).

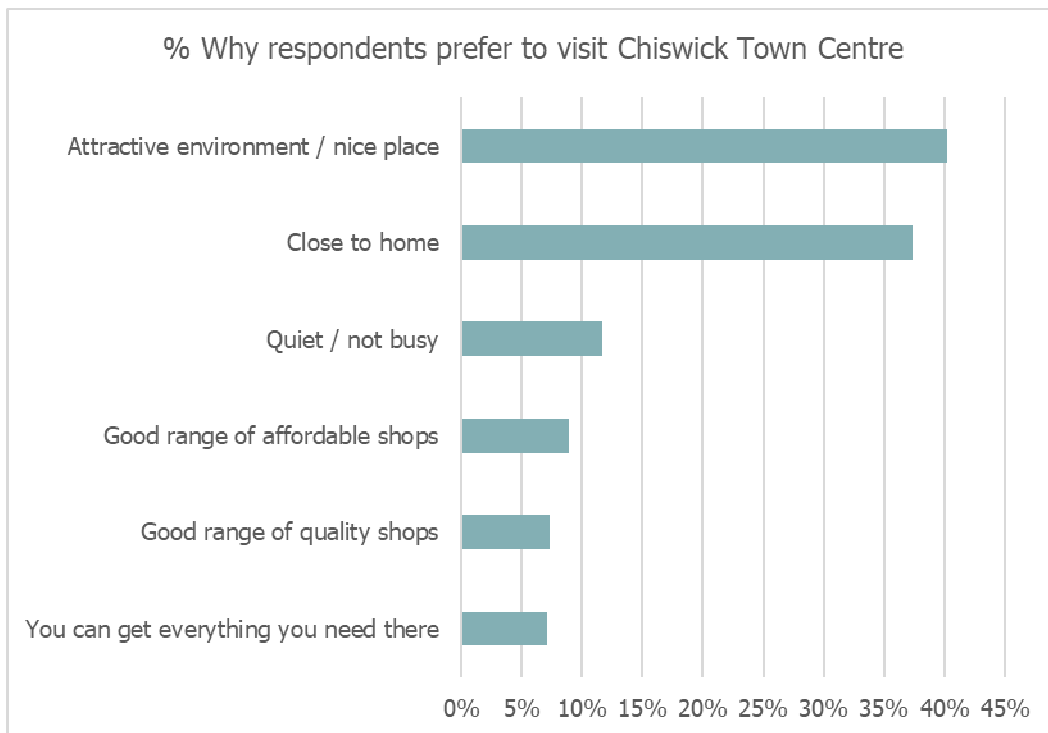
Figure 9.7: Main Reason for visiting Chiswick Town Centre



Source: Q22a, and 22b (1st & 2nd mention combined), NEMS Household Survey (May 2018)

9.2.39 Turning to why respondents chose to visit Chiswick Town Centre over other centres, Figure 9.8 identifies the top responses, including its an attractive environment/nice place provided by 40%. The second highest response was due to it being close to home (37%), followed by it is quiet/not busy and has a good range of affordable shops (9%). A further 7% stated it has a good range of quality shops and you can get everything you need there.

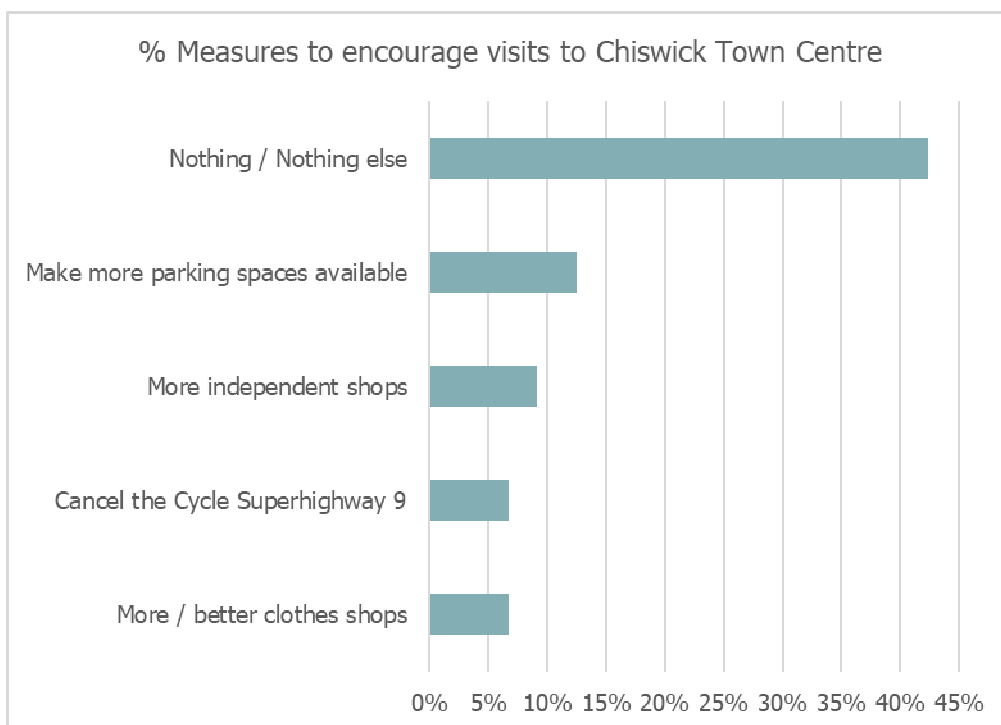
Figure 9.8: Why respondents prefer to visit Chiswick Town Centre



Source: Q23a, and 23b (1st & 2nd mention combined), NEMS Household Survey (May 2018)

9.2.40 Finally, respondents in the household survey were asked if there were any measures that would encourage them to visit Chiswick Town Centre more frequently. The most common responses are at Figure 9.9.

Figure 9.9: Measures to encourage visits to Chiswick Town Centre



Source: Q24a, and 24b (1st & 2nd mention combined), NEMS Household Survey (May 2018)

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- 9.2.41 Despite only around 29% of respondents driving to the centre, the most common response that would encourage residents to visit the town centre, (after nothing/nothing else (42%)), was to make more parking spaces available (12%). Other responses include provision of more independent shops (9%), better clothes shops (7%) and finally less bookmakers (5%). Although it is interesting to note the centre only contains two betting offices.
- 9.2.42 Around 7% of respondents also identified cancelling the Cycle Superhighway 9 would encourage them to visit more often. The Cycle Superhighway 9 proposes a two-way segregated cycle track on Chiswick High Road, it is part of the wider Cycle Superhighway being proposed by TfL to improve connectivity by cycling across West London's centres.
- 9.2.43 Following engagement with key stakeholders, the following views on Chiswick Town Centre were raised:
- There is a good selection of independent shops and chain stores.
 - The town centre local loyalty scheme is successful.
 - The centre could benefit from additional cycle provision.
 - Business rates are too high and result in some independent traders closing.
 - There is an increasing number of charity shops within the town centre, yet also very fancy/expensive shops.
 - The main road through the centre is very busy and the pavement is used by cyclists.
- 9.2.44 A summary of all feedback obtained is at **Appendix B**.

Town Centre Environmental Quality

- 9.2.45 Chiswick Town Centre environmental quality is generally considered to be good. The majority of the town centre is covered by Chiswick High Road Conservation Area or Turnham Green Conservation Area and a number of buildings along Chiswick High Road are listed buildings or locally listed. Shop fronts are generally of good quality throughout, many retaining historic frontages.
- 9.2.46 Chiswick High Road provides some street furniture including lighting, seating, planting and tree line along the wide pavement, particularly on the south side of the street which creates a leisurely and attractive shopping environment. At the west of the centre, Turnham Green Park is protected as Local Open Space and provides a large area of green space within the town centre.
- 9.2.47 Chiswick High Road is a busy main route running through the town with a number of buses stopping and departing alongside heavy traffic flow. However, given the wide pavement widths and regular crossing points this does not adversely affect the quality of environment within the town centre.

Summary

9.2.48 Following our visits and assessment, Chiswick Town Centre is considered to display good levels of vitality and viability. In particular, the centre has a very low vacancy rate, which has improved over the last year. The provision of comparison goods is higher than the UK average and although it does not contain a high proportion of Experian's 'Major Retailers' it contains a number of other upmarket brands and national retailers. The food and drink offer within the centre is in line with the national trends and in particular provides a strong restaurant offer. The provision of hotels and other leisure uses including a cinema was considered to be low. The environmental quality of the town is good and provides a pleasant shopping environment as noted by almost half of the NEMS survey respondents.

9.3. Qualitative Need Summary

9.3.1 A summary of the qualitative need for both convenience and comparison goods and other main town centre uses is now provided below. Our qualitative need summary is informed by the health check assessment of the centre, a review of market shares and the role and function of the centre.

Convenience Goods

9.3.2 The proportion of convenience goods within the centre is slightly above the UK average with floorspace some 5% higher. In terms of market share, Chiswick retains 55% of main food shopping trips from its principal zone (Zone 7) and 77% of top-up shopping trips. Furthermore, the main reason respondents of the household survey provided for visiting the town centre was for food shopping. Accordingly, having regard to these findings and the existing provision we do not consider that there is a qualitative need for significant additional convenience provision within the town centre.

Comparison Goods

9.3.3 The comparison goods provision within the centre is considered to be good and provides a variety of different goods including clothing and footwear, the proportion of which is roughly in line with the UK average. However, it was noted by respondents in the survey that a greater number of clothes shops would encourage them to visit more frequently. In addition, Chiswick's market share for comparison goods is only 30% from its principal zone and when referring to clothing and footwear goods is 30%. It increases slightly for bulky comparison goods shopping to 33%.

9.3.4 It is considered that Chiswick could benefit from an increase in comparison goods provision to offer a greater variety of retailers and potentially become more of a comparison goods shopping destination. Of particular note, 9% of the survey respondents indicated more independent shops would encourage them to visit more often.

Other Main Town Centre Uses

- 9.3.5 The retail services within the centre have improved over the last 12 months and is higher than the UK average in both unit number and floorspace provision. We consider there is no obvious qualitative needs for additional retail services within Chiswick Town Centre.
- 9.3.6 The leisure services are in line with the UK average, and it is noted there is a higher proportion of food and drink uses, particularly restaurants, within the centre. This is supported by the NEMS household survey results which found that around 27% of residents visit Chiswick to use cafes and restaurants, followed by 10% visiting pubs/bars. The centre does not contain a cinema or any large scale commercial gyms/fitness centres, although there is a theatre and a number of smaller specialist fitness centres. We consider that there are no qualitative deficiencies in leisure service provision in the town centre.
- 9.3.7 The hotel provision in the town centre is currently below average and appears to cater to a specialist market. It is considered that there is a qualitative deficiency and opportunities should be investigated by the Council to seek to address the current requirements from three hotel operators.
- 9.3.8 The financial and business service provision is broadly in line with the UK average and contains a number of national banks, alongside solicitors, employment agencies and estate agents, although it is noted that the proportion of estate agents within the centre dominate. This was noted by respondents within the household survey, with around 3% saying that less estate agents would encourage them to visit Chiswick more often. In summary, we do not consider that there is qualitative need for additional financial and business services within the centre. The existing provision could benefit however from diversification to ensure it continues to serve local residents needs.
- 9.3.9 The office space within the centre is identified to be just below 3,000sq m floorspace. Following review of the ELR it is noted that Chiswick is considered to have a healthy demand for office space. On this basis, it is considered that options should be reviewed for the potential to accommodate additional town centre office floorspace at upper levels, of differing size and rental values in order to attract a variety of potential occupiers.

10.0 Brentford Qualitative Need Assessment

10.1 Introduction

10.1.1 The qualitative health check assessment of the vitality and viability of Brentford Town Centre is undertaken below. This seeks to understand the health of the centre and assist in identifying any qualitative retail needs. A review of existing office accommodation is undertaken and the potential for town centre space to contribute to requirements for additional office floorspace is commented upon.

10.2 Vitality and Viability Town Centre Health Check

- 10.2.1 Similar to Hounslow and Chiswick, the health check assessment is based on the indicators published within the NPPG to assess the vitality and viability of Brentford Town Centre. The details of the methodology are contained at **Appendix D**.
- 10.2.2 Brentford Town Centre is classified as a District Centre within the Adopted Local Plan 2015-2030. The town centre boundary extends from Brentford Lock in the west along the High Street to Brentford County Court in the west, to the south it follows Augustus Close to the river and then follows the riverbank to the east and back to the High Street by the County Court building and to the north it follows the lock, then along Market Place and Lion Way.
- 10.2.3 For the purposes of the Study, the health check assessment is based on the Experian Goad boundary area of the town centre (survey undertaken by Experian in April 2016 and updated by WYG in May 2018). This extends beyond the current town centre boundary from the Court building to the east up to the McDonald's adjacent to Ealing Road and to the west up to Field Lane. To inform this current Study, and to enable 'like for like' comparisons with the previous Experian Goad Plan, we undertook a new survey of Brentford Town Centre in May 2018. The use of the Goad boundary is helpful in allowing data on the occupation of units to be 'benchmarked' with national average Goad data.

Diversity of Uses and Retailer Representation

- 10.2.4 The retail and leisure composition of Brentford Town Centre, in both unit number and floorspace terms, is provided below in Figures 10.1 and 10.2.

Figure 10.1: Composition of Retail/Leisure Units in Brentford Town Centre

	2016		2018		UK Average
	No.	%	No.	%	%
Convenience	15	13	15	13	9
Comparison	21	18	18	16	32
Retail Service	19	16	22	19	14
Leisure Service	37	32	38	33	24
Financial & Business Service	12	10	14	12	11
Vacant	12	10	8	7	11
Total	116	100	115	100	100

Source: Experian Goad Survey, April 2016 and May 2018.

UK average figure is at February 2018 (latest available at time of writing)

% figures may not add due to rounding

Figure 10.2: Brentford Town Centre Diversity of Use for Commercial Floorspace

	2018		UK Average
	Sq m Gross	%	%
Convenience	4,680	16	15
Comparison	3,710	12	35
Retail Service	3,430	11	7
Leisure Service	9,190	31	25
Financial & Business Service	7,870	26	8
Vacant	1,110	4	10
Total	29,990	100	100

Source: Experian Goad Survey updated by WYG May 2018

UK average figure is at February 2018 (latest available at time of writing)

% figures may not add due to rounding

Convenience Goods

- 10.2.5 The proportion of convenience goods units is 13% of the total units and is above the UK average of 9%. The convenience goods provision comprises a large Morrisons foodstore (2,770sq m) and a number of smaller convenience stores, bakers, office licence and delicatessen. The proportion of floorspace in convenience use is just above the UK average (16% compared to 15%), suggesting Brentford Town Centre has an adequate convenience offer. However, whilst the Morrisons enables a main food shop to be undertaken and there are a number of smaller convenience goods, there is a limited variety of other stores available with only one butcher, 1 baker and no fishmonger. The number of convenience goods units remains unaltered since April 2016.
- 10.2.6 We understand that the Brentford Waterside redevelopment scheme is intended to include a new foodstore with a net convenience goods floorspace of around 1,397sq m. This will help to improve the choice of shops for undertaking main food and top-up shopping within the town centre. Planning permission has also recently (May 2018) been granted for mixed-use redevelopment of the existing Morrisons foodstore to provide a new retail foodstore, 4 smaller flexible retail units and around 200 new residential apartments. The level of convenience floorspace within the new foodstore is similar in size to that within the existing Morrisons foodstore.

10.2.7 The town centre also benefits from a weekly market held at Market Place every Sunday from 10am to 2pm. The market specialises on local food produce and traders include local businesses, community projects and food start-ups. Stalls presently offer coffee beans, Spanish charcuterie, cheese, fresh meat, artisan bread, cakes and pastries, olives, pies, wines, chocolate, chutneys and juices/smoothies. The market provides the opportunity to purchase local specialist produce and is also an event within Market Place attracting people to the centre.

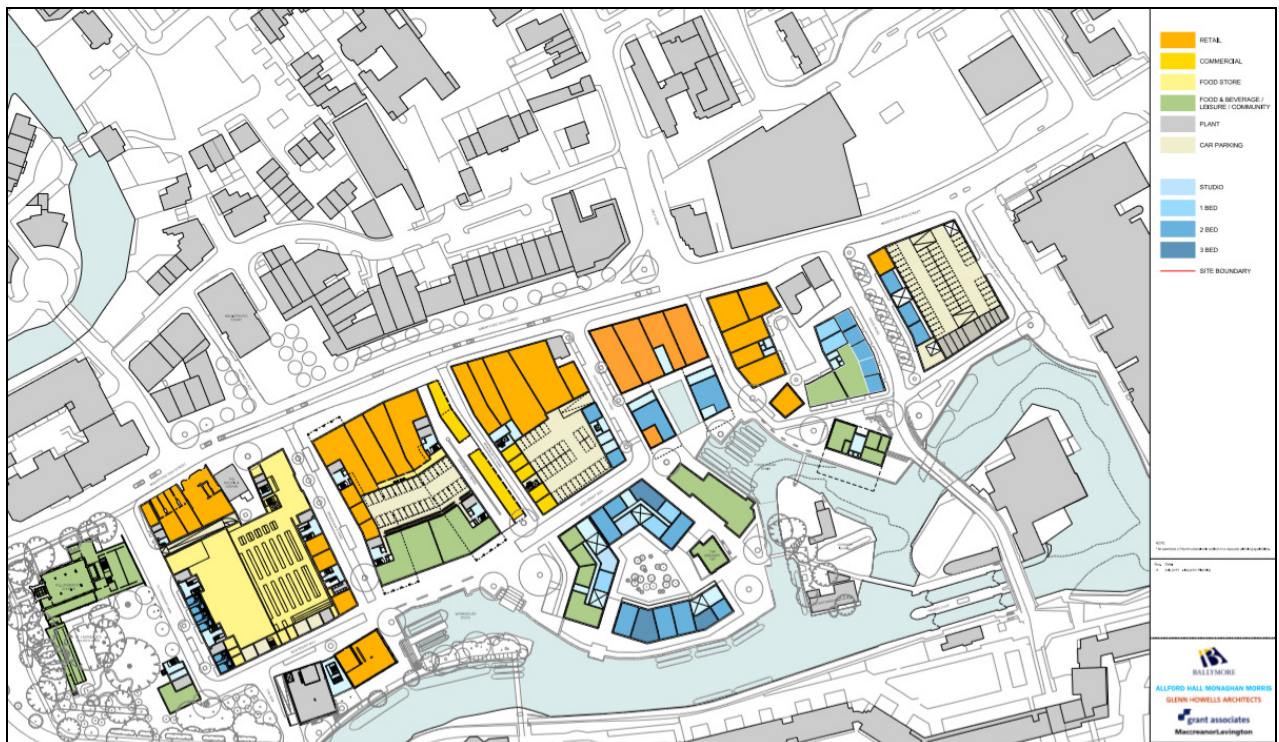
Comparison Goods

10.2.8 The town centre contains 18 comparison goods units representing 16% of the total unit number and is significantly below the UK average of 32%. When comparing the comparison goods floorspace this is 23% below the national average, suggesting there is a deficiency in terms of the comparison goods on offer within the centre. The centre has also seen a decline in comparison units over the last 2 years by 3 units. The units lost include Harper Kitchen Furniture (x2) and Magi-Led Lighting.

10.2.9 The centre does not contain any stores offering clothing or footwear, with the exception of two charity shops. Instead the comparison goods offer is largely oriented towards furniture, homeware, DIY and home improvements. There are also two chemists, two toy shops, a cycle store and disabled goods equipment store. The centre does not contain any of the 'Major Retailers' defined by Experian. The national multiples present are limited to Pets at Home and Age UK Charity Shop, the remainder of the comparison goods offer is provided by independent or local operators.

10.2.10 The Brentford Waterside redevelopment scheme will include retail and leisure uses alongside residential accommodation. Figure 10.3 shows the Proposed Site Plan and range of units for the comprehensive redevelopment scheme.

Figure 10.3: Brentford Waterside Mixed-Use Redevelopment Scheme



Source: Proposed Ground Plan submitted with the planning application (reference. 00607/BA/P2)

10.2.11 In addition to the foodstore, the permitted scheme is intended to include around 4,200sq m net comparison goods floorspace. This will significantly boost the proportion of comparison goods units and floorspace within the centre and provides the opportunity to attract new comparison goods retailers to the town.

Retail Services

10.2.12 Brentford Town Centre contains 22 retail services, an increase of 3 units (hair and beauty salons) since 2016. The proportion of units providing retail services is above the UK average by 5% and 4% in floorspace terms. Just over half of these units are health and beauty establishments, representing 11% of the total number of units, some 2% higher than the national average (9%). Other services include dry cleaning (x3), car repairs (x3), optician, internet café and a post office.

Leisure Services

10.2.13 There are 38 leisure units within Brentford Town Centre comprising 33% of the total units. This is higher than the national average of 24%, but in floorspace terms is comparable to the national average. Of the 38 units, 22 are restaurants, cafes or takeaways, comprising 19% of the total units which is again above the UK average of 15%. There are also 10 pubs/bars comprising 9% of the units against the national average of 4%.

10.2.14 The town centre also benefits from two hotels (Premier Inn and Holiday Inn), with the Premier Inn being towards the eastern edge of the centre and Holiday Inn to the west. In addition, there are two betting offices and a cinema. Watermans Cinema and Museum and Art Gallery is located on the High Street and is a multi-purpose arts centre, providing cinema screenings, theatre, cabaret, exhibitions and creative workshops.

10.2.15 The Waterside redevelopment scheme includes leisure uses comprising new bars and restaurants along the waterside and also leisure activities associated with the waterside location. This will significantly improve the leisure offer within Brentford and help to maximise its potential and become a destination in its own right.

Financial and Business Services

10.2.16 Financial and business services comprise 12% of the total number of units within Brentford Town Centre and occupy some 7,870sq m of floorspace. This is higher than the UK average in both unit number and floorspace terms (+2 and +18% respectively). The financial and business services floorspace is substantially higher than the national average due to the Heidelberg Graphic Equipment unit at 69-76 High Street which comprises some 5,870sq m of floorspace and significantly inflates the floorspace.

10.2.17 The financial and business services within the centre include two banks: Barclays and Natwest, 5 estate agents, 3 solicitors, building contractors and other business services. Whilst the centre benefits from two national banks, comprising 2% of the total units, this is below the national average for banks and building societies at 3%.

Office Uses

10.2.18 The Experian Goad Town Centre Land Use Plan identifies that there is around 3,540sq m of office floorspace within the centre.

10.2.19 Similar to Hounslow, the ELR notes that Brentford Town Centre features older secondary office stock and are regarded as being in need of rejuvenation and considered to be unattractive and poor strategic locations. Instead a number of references are made to the potential of office locations along Great West Road. Although the ELR notes that this is consistent with findings of the GLA London Office Policy Review, which found that generally, town-centre office locations in Outer London areas are in decline generally, town-centre office locations in Outer London areas are in decline. Despite this, the GLA Health Check (January 2018) reports that Brentford has experienced an annual growth rate in Grade A and B office rents between 2013-16 of around 15% for Grade A office accommodation and 20% for Grade B.

10.2.20 In terms of rental values, the ELR identifies that office space in Brentford Town Centre achieves around £150 per sq m and as a result refurbishment is not viable. We note that the Brentford Waterside redevelopment includes an element of office space, albeit only 4,011sq m floorspace. This will help to make a contribution to the office floorspace requirement and should be more attractive than existing

secondary office space within the town centre. In addition, the major redevelopment will significantly enhance and regenerate the town centre and bring a significant number of new residents, shoppers, employees and visitors to the town centre and will hopefully improve the current negative viewpoint, identified in the ELR, of the area by employers. On this basis, it is recommended that the Council undertake a review of the existing office space within Brentford Town Centre and support refurbishment of the space which should be able to attract higher rental values following the regeneration of the area.

Vacancies

10.2.21 Brentford Town Centre has a reasonably low vacancy rate and currently contains only 8 vacant units and 1,100sq m vacant floorspace. In unit number and floorspace terms, this is below the national average at -3% and -6% respectively.

10.2.22 The centre has seen a slight improvement in the number of vacant units since April 2016 with a reduction of 1. There are a number of units and sites within the centre which are presently vacant yet are undergoing alteration. These have been excluded from the vacancy rate to ensure a fair picture is presented of the available units and floorspace within the town centre which could be occupied at the present time.

Figure 10.4: Vacancies in Brentford Town Centre

2016		2018		UK Average %
No.	%	No.	%	No.
12	10	11	3	11

*Source: April 2016 Experian Goad Survey and updated by WYG May 2018
UK average figure is at February 2018
% figures may not add due to rounding*

10.2.23 When reviewing the size of the units presently vacant, the units are generally small in size with the largest being 250sq m (109 High Street). Of the remaining units, 3 measure 200-210sq m, 2no. x 80sq m, 1no. x 70sq m and 1no. x 20sq m. The vacant units are reasonably well distributed throughout the centre, although two of the larger units are located on Ferry Lane and the atmosphere and activity levels within this area could be improved through the occupation of these units. **Appendix H** shows the location of vacant units within the town centre.

Operator Requirements

10.2.24 We have again reviewed 'The Requirements List' in order to identify the type and broad number of operators currently seeking representation in Brentford Town Centre. This informs the assessment of the health of the centre and can help to identify potential future operators for any redevelopment schemes. 'The Requirements List' identify a total of 8 retail/leisure operators currently seeking premises in Brentford.

Figure 10.5: Registered Requirements, Brentford

Name	Minimum Size (sq m)	Maximum Size (sq m)
Retail/Services		
Bensons for Beds	232	697
Lidl	929	2,787
Savers	139	279
Supercuts	56	70
Mind	79	139
Leisure (incl. Food & Drink)		
KFC	167	325
Snap Fitness	372	929
Travelodge	929	3,716

Source: 'The Requirements List', June 2018

10.2.25 The above suggests that whilst there are comparison goods operators seeking representation in Brentford Town Centre, there are no clothing and footwear stores, with the exception of Mind Charity. In terms of leisure operators, there is a limited level of demand from commercial leisure operators seeking representation in Brentford.

Pedestrian Flows

10.2.26 Pedestrian activity was monitored during our surveys of the centre. The centre was considered to be fairly busy and high levels of footfall were monitored in the vicinity of the Morrisons store and to the east of this on the High Street from units no. 215 to Market Place. Higher footfall was noted on the northern side of High Street compared to the south and although there are pedestrian crossing points it was not particularly easy to navigate the eastern stretch of the High Street as a pedestrian.

10.2.27 Lower levels of footfall were monitored at the periphery of the centre, as is typically expected. However, very limited pedestrian activity was recorded on Ferry Lane and the plaza facing the docks. The occupation of the vacant units in this area could help to improve activity in the area.

Accessibility

10.2.28 Brentford Town Centre does not benefit from a centrally located railway or underground station, with Brentford Railway Station situated to the north of the town centre on Boston Manor Road approximately 0.5 miles away. The station offers rail links to London Waterloo, Weybridge, Woking and Mortlake.

10.2.29 Turning to the bus services, the centre contains a number of bus stops situated at different points along the High Street and provides frequent services to North Brentford Quarter, White City, Hammersmith, Aldwych, Hounslow West, Sunbury and Fulwell. Further bus stops are located on Ealing Road and provide services to Ealing Broadway and Kingston.

10.2.30 The centre is accessible by cycling from the surrounding area with on-street cycle lanes provided along part of High Street, albeit it is noted these end as the road narrows to the west of the centre. Cycle parking is readily available at numerous points in the retail core of centre, with more limited parking at

the periphery. The NEMS household survey results highlight only 1% of respondents travel to the centre via bike. During our visits, the cycle parking was reasonably well used and there were cyclists in the area, albeit not high numbers.

- 10.2.31 Accessibility by car is via the South Circular road to the east, the B455 Ealing Road to the north and A315 London Road to the west. Car parking is provided towards the edge of the centre at the following locations in Figure 10.6.

Figure 10.6: Main Central Car Parks in Brentford Town Centre

Car Park Location	Spaces
McDonald's Car Park	25
Albany Parade	80
Euro Car Park (below Premier Inn)	140
Euro Car Park (Morrisons store)	110
High Street	20
Commerce Road multi-storey (below Holiday Inn)	100
London Road Retail Park	110

**As defined by Experian Goad*

- 10.2.32 The NEMS household survey identified that around 32% of respondents travel to Brentford Town Centre via car, with the majority 48% walking. However, no respondents stated that Brentford Town Centre was easy to get to by car and less than 3% noted it was easy to find a parking space. Instead 3% of respondents stated that making more parking spaces available would encourage them to visit Brentford Town Centre more often.

Perception of Safety

- 10.2.33 Our site visits and surveys in Brentford Town Centre were undertaken during the day and there was a general feeling of safety within the centre. The most notable issue relates to the A315 running through the centre and the formation of the road in parts results in narrow pavement widths on the south side of High Street creating a less comfortable environment for pedestrians, particularly those with pushchairs or mobility equipment. Albeit it is noted that a barrier is in place along the edge of the pavement and road for protection to pedestrians.
- 10.2.34 Only a limited number of respondents from the NEMS household survey (1%) identified that improvements to the safety of the centre would encourage them to visit the town centre more often. We also have obtained crime records for the town centre and the surrounding area (Syon ward) to gather some empirical evidence in relation to safety. From May 2017 to April 2018 the crime rate for the area ranged from just below 200 incidents per month to the 125 incidents in February 2018. When comparing with other towns, the crime rate is roughly the same/slightly higher than Chiswick (around 150 incidents per month), yet lower than Hounslow (around 250 monthly incidents).

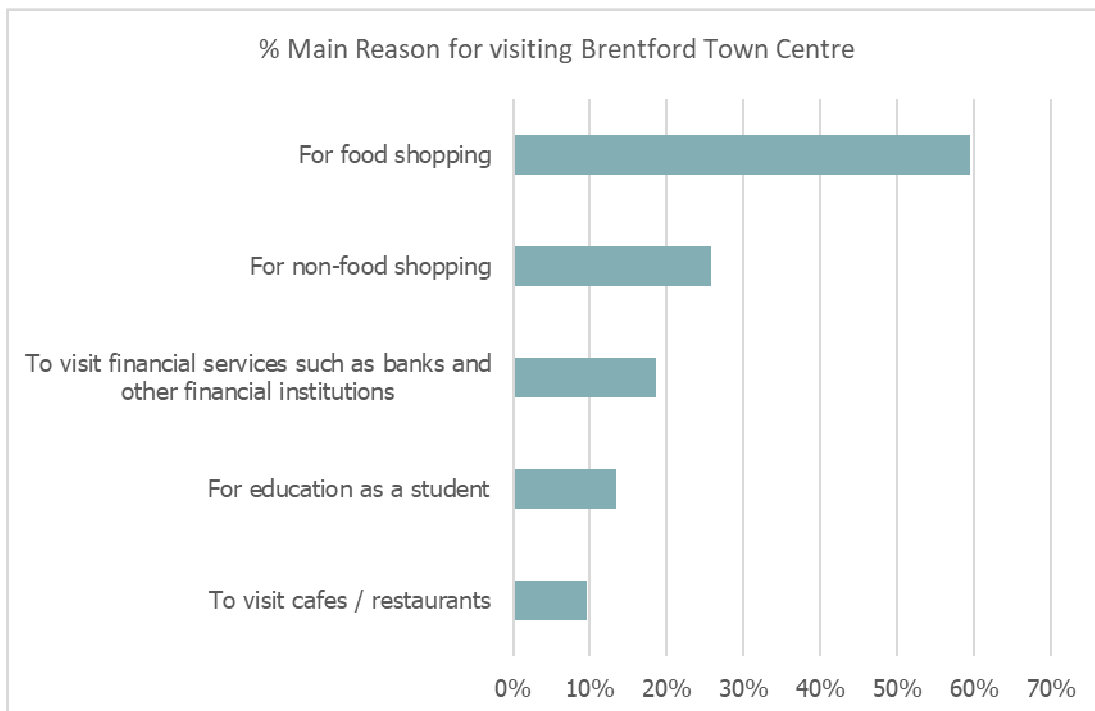
10.2.35 Following a review of the type of crime recorded, 26% was violent and sexual offences, followed by anti-social behaviour (19%), vehicle crime (15%) and burglary (8%). The highest level of incidents recorded (in April 2018) appear to be just outside of the town centre. Within the town centre incidents were in the vicinity of the Magistrates Court and Holiday Inn Express. There does not appear to be any specific crime hotspots within the centre.

Views and Behaviour

10.2.36 Utilising the NEMS survey we have been able to obtain information on the main reasons why respondents visit Brentford Town Centre and what they most liked about it and what, if any, measures would encourage them to visit the centre more often.

10.2.37 The main reasons why respondents visit Brentford Town Centre is shown below in Figure 10.7. As the graph highlights, the majority of respondents stated their main reason for visiting the town centre is for food shopping (60%). The second most popular reason for visiting the centre is for non-food shopping (26%). Other less popular reasons include to visit financial services (19%), for education as a student (13%) and to visit café's/restaurants in the centre (10%).

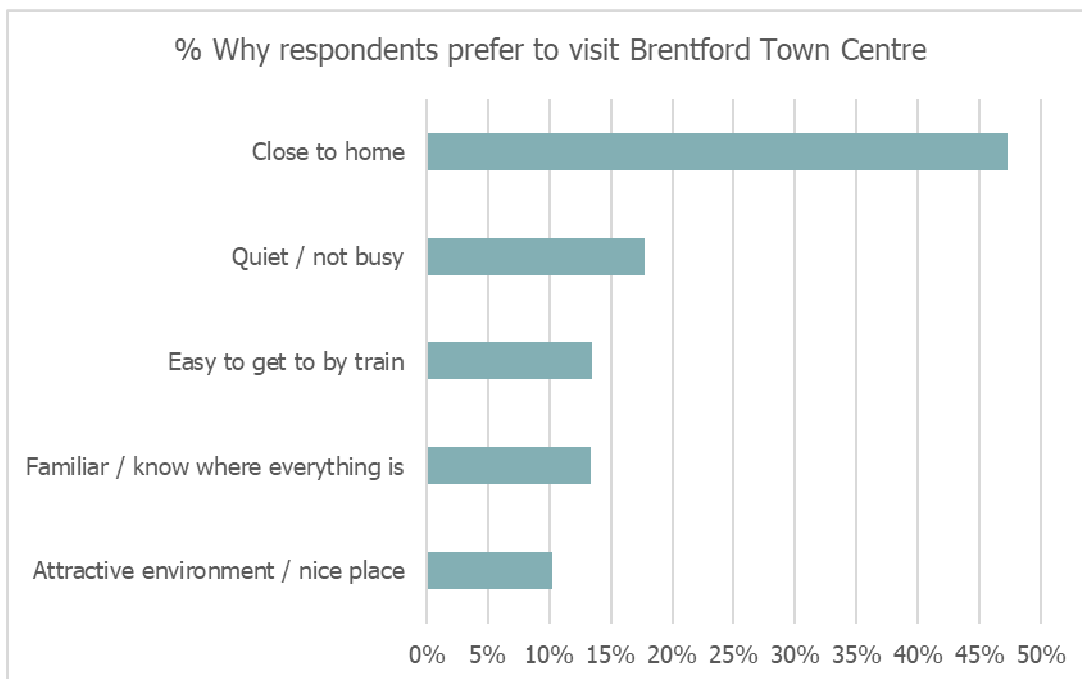
Figure 10.7: Main Reason for Visiting Brentford Town Centre



Source: Q22a and 22b (1st & 2nd mention combined), NEMS Household Survey

10.2.38 Figure 10.8 below shows why users of Brentford Town Centre prefer to visit the centre. It identifies that a large proportion of respondents like the fact that the town centre was close to home/convenient (47%) and also that it is quiet/not too busy (18%). Users also like the fact that it is easy to get to by train and it is familiar/know where everything is (14% each) and consider it is an attractive environment/nice place (10%).

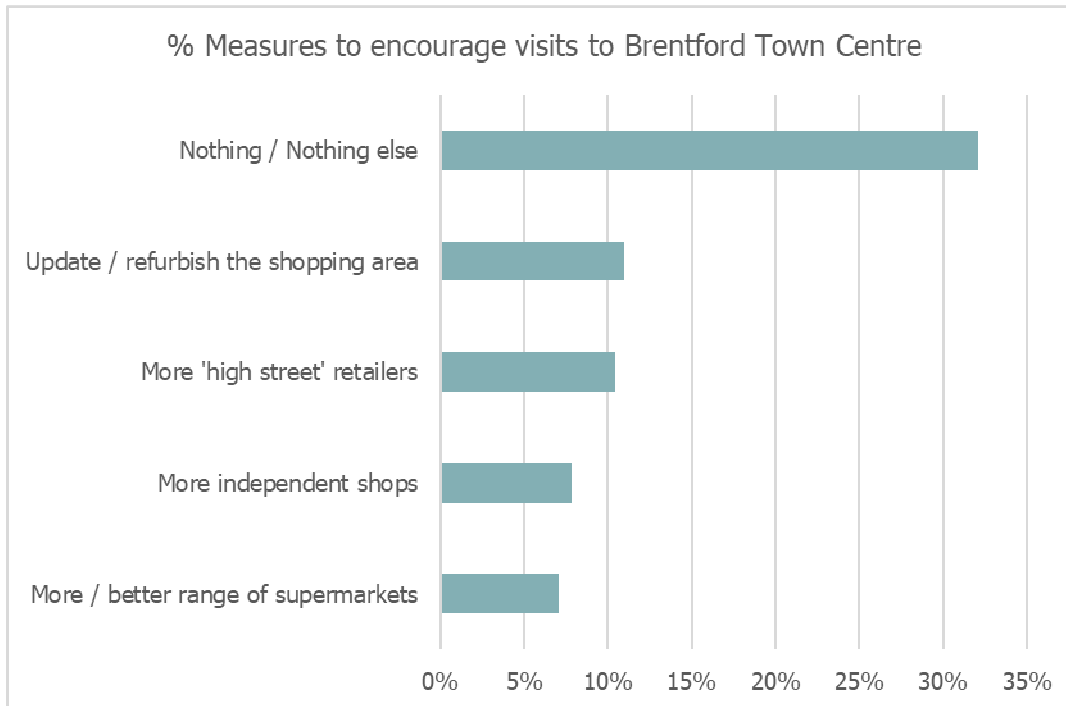
Figure 10.8: Why respondents prefer to visit Brentford Town Centre



Source: Q23a and 23b (1st & 2nd mention combined), NEMS Household Survey

10.2.39 Figure 10.9 identifies what measures would encourage users of Brentford Town Centre to visit the centre more often. The most common response by town centre users said nothing/nothing else (32%) would encourage them to visit the centre more often. In terms of potential measures, 11% consider updates/improvements to the town centre environment would encourage them to visit the centre more often. Of the other measures mentioned, the most popular suggestions relate to the number/range of shops and include: more high street retailers (10%); more independent shops (8%); and more and better range of supermarkets (7%).

Figure 10.9: Measures that would encourage visits to Brentford Town Centre more often



Source: Q24a and 24b (1st & 2nd mention combined), NEMS Household Survey

10.2.40 In terms of our engagement with key stakeholders a number of views on Brentford Town Centre were raised. All views/feedback from key stakeholders are summarised in **Appendix B** of this study. A summary of the most common views is provided below:

- Brentford should maximise its positioning on two impressive locks.
- The Market Square creates a focal point within the town centre. Although the weekly market is struggling due to low footfall.
- The centre has good bus connections.
- The potential loss of Morrisons and no replacement is a significant threat.
- The quality of the High Street is poor and many shops on the south side are vacant and boarded up negatively impacting on the quality of the environment.
- The green infrastructure is very poor and the centre could benefit from planting
- The centre is polluted with high numbers of vehicles passing through.
- There is a lack of diversity in the shops available and a fear Brentford will lose its identity with local retailers unable to trade and replaced by 'chain stores'.
- The town centre is not a destination for shopping or leisure activities at present.
- Lack of visible parking is a problem and deters visitors.
- The Watermans Art Centre provides a major attraction and should be enhanced.
- The South side of High Street is blighted by the Ballymore proposals for which there is no realistic plan or retail demand.

trees, hedges and flowers to make it a more attractive place.

- The future of the town centre is threatened by the numerous development sites in the centre and the lack of a 'joined up' approach.

10.2.41 The feedback obtained from key stakeholders differs to the opinions provided by respondents of the NEMS household survey, in that the most common response stating nothing would encourage them to visit more often, suggesting they have no major concerns regarding the town centre. Whereas key stakeholders raised a number of concerns as summarised above and referred to the introduction of Business Improvement District (BID) team to help improve the centre. However, as evident above and at **Appendix B**, the majority of concerns relate to the quality of the environment and stalled redevelopment sites.

Town Centre Environmental Quality

10.2.42 The environmental quality of the town centre is considered to be average. Shop fronts are of a mixed quality, with some retaining historic features (Natwest Bank) and some in the vicinity of Market Place benefiting from new shopfronts and signage. Whilst others on the south side of High Street could benefit from improvement/modernisation. Part of the town centre is located within the Grand Union Canal and Boston Manor Conservation Area and contains some listed and locally listed buildings. Soaphouse Lane is an attractive area fronting the river and the restaurants offer outdoor seating. However, during our visits this area and Ferry Lane were quiet with low levels of pedestrian activity.

10.2.43 The former Town Hall building fronting Market Place forms an attractive area within the town. At present there are a number of empty/derelict buildings and hoarding around them which are due to be redeveloped. Their present appearance has a detrimental impact on the quality of environment within the town centre. Following redevelopment/regeneration proposals the environmental quality will be significantly enhanced.

10.2.44 As identified at paragraph 10.2.31, the A315 running through the centre partly detracts from the quality of environment at places. However, we understand that this will be addressed through the Waterside redevelopment proposals which include widening the footpath on the southern side of high street, shared surface central zone along the middle of High Street and 20mph speed limit through the centre amongst other improvements.

Summary

10.2.45 Overall, Brentford Town Centre is considered to display adequate levels of vitality and viability. In particular, the centre has a strong independent service offer, with higher than national average numbers of retail, leisure and financial and business services. However, the comparison goods offer within the

centre is weak and the environmental quality is relatively poor. The vacancy rate within the centre has declined over recent years, yet it is noted a number of units are currently undergoing alterations.

10.3 Qualitative Need Summary

10.3.1 A summary of the qualitative need for additional floorspace for convenience and comparison goods and other main town centre uses within Brentford Town Centre is provided below.

Convenience Goods

10.3.2 In terms of convenience goods, the centre contains higher than average number of units, although it is noted that the range of stores is limited and could benefit from improvement, with only the Morrisons store capable of undertaking a main food shop. Whilst 60% of respondents in the NEMS household survey stated their main reason for visiting the centre was for food shopping, 7% indicated that providing more/better range of supermarkets would encourage them to visit more often. Despite this Brentford has a fairly high retention rate for main food shopping trips at around 70% from its principal zone (Zone 6). However, it is worth noting that almost half of this is at the out of centre Tesco Extra store at Syon Lane.

10.3.3 On this basis, it is considered that the town centre could benefit from further convenience goods provision to improve the range of choice and attract further food shopping trips to the town centre. The Brentford Waterside redevelopment scheme is intended to provide a new foodstore, if this scheme is delivered the qualitative need will be met.

Comparison Goods

10.3.4 Turning to comparison goods, the centre has a significant proportion of comparison goods units when compared to the national average and currently contains no clothing or footwear retailers, evidenced through it having no market share for clothing purchases. The amount, type and choice of comparison goods within the centre could benefit from improvement, this is further supported by a number of respondents in the NEMS survey stating more shops including high street retailers, independents and high-quality shops would encourage them to visit more often. However, it is noted there are a limited number of comparison retailers presently seeking representation within the centre.

10.3.5 The Waterside redevelopment is intended to provide around 4,000sq m net comparison goods floorspace so will significantly improve the provision of comparison goods retail. If delivered the regeneration scheme will improve the attractiveness of the centre to retailers/occupiers and in turn increase the towns market share of nearby shoppers.

Other Main Town Centre Uses

- 10.3.6 The retail service provision within the centre is above the UK average and includes a variety of services such as dry cleaning, car repairs, optician, post office, hairdressers, beauty salon and internet café. Albeit it is noted, the majority of services are oriented towards hair and beauty establishments. Despite this we do not consider there is a significant qualitative need for additional retail services within the centre.
- 10.3.7 The leisure services within the centre are well represented with 9% higher number of units than the national average. The centre contains a strong provision of food and drink facilities with cafes, restaurants and takeaways and pubs/bars being above the national average. Around 10% of the respondents in the NEMS household survey also indicated that they visit Brentford to use cafes/restaurants in the centre. The Watermans Cinema and Art Gallery provides a key attraction within the centre as identified by stakeholders and the existing hotel provision is considered to be good. Given the existing provision and the additional leisure floorspace proposed as part of the Waterside redevelopment, we do not consider there will be any further qualitative requirement for additional leisure floorspace in the town centre.
- 10.3.8 In terms of hotels, our high-level assessment identifies that the centre currently provides 2 hotels which comprises 2% of the total number of units, higher than the national average of 1%. We are not aware of requirements from hotel operators in the town or of any qualitative deficiencies with the existing uses.
- 10.3.9 The proportion of financial and business services within the centre is above the UK average and contains a mix of banks/building societies, estate agents, solicitors, building contractors and other business services. With the exception of the large number of estate agents, the existing financial and business service provision is considered appropriate for a town the size of Brentford.
- 10.3.10 Turning to office space within the town centre, the ELR notes that much of the town centre accommodation is secondary older stock and is unattractive to potential occupiers. If developed, the 4,011sq m office floorspace proposed as part of the Waterside redevelopment will to help to provide more attractive/modern office accommodation to occupiers/businesses.

11.0 Feltham Qualitative Needs Assessment

11.1 Introduction

11.1.1 This section contains the qualitative needs assessment for Feltham Town Centre having due regard to the the household telephone survey findings, our vitality and viability assessment of the centre and review of existing provision.

11.2 Vitality and Viability Town Centre Health Check

11.2.1 The health check assessment considers the vitality and viability of the town centre in line with the indicators published within the NPPG, following the same methodology undertaken for Hounslow, Chiswick and Brentford (detailed at **Appendix D**).

11.2.2 Feltham is classified as a District Centre within the Adopted Local Plan and the proposals map indicates the town centre boundary runs from the Lidl store on New Road in the north down the High Street to Manor Lane in the south and runs along Manor Lane and up around the Tesco store, up Highfield Road and around the train station. We have utilised the Experian Land Use Goad Plan coverage of the town centre in order to where possible compare to the previous survey (July 2015) and to national averages. The Goad Plan extends slightly further to the south than the Local Plan town centre boundary to include the retail units at Manor Park and to the north west to include the retail units along Bedfont Lane. The extent of the Goad Plan coverage is shown at **Appendix H**.

Diversity of Uses and Retailer Representation

11.2.3 We have reviewed the diversity of retail and service uses accommodated in the town centre (by number, type and quantum of floorspace) and provide our findings in Figures 11.1 and 11.2 below.

Figure 11.1: Feltham Town Centre Diversity of Use for Commercial Units

	2015		2018		UK Average
	No.	%	No.	%	%
Convenience	15	14	16	15	9
Comparison	31	29	31	29	31
Retail Service	20	19	21	20	15
Leisure Service	24	23	24	23	24
Financial & Business Service	12	11	13	12	10
Vacant	4	4	1	1	11
Total	106	100	106	100	100

Source: Experian Goad Survey, July 2015 and May 2018.

UK average figure is at February 2018 (latest available at time of writing)

% figures may not add due to rounding

Figure 11.2: Feltham Town Centre Diversity of Use for Commercial Floorspace

	2018		UK Average
	Sq m Gross	%	%
Convenience	14,690	45	15
Comparison	11,160	34	35
Retail Service	1,820	6	7
Leisure Service	3,110	9	25
Financial & Business Service	2,130	6	8
Vacant	70	0	10
Total	32,980	100	100

Source: Experian Goad Survey updated by WYG May 2018

UK average figure is at February 2018 (latest available at time of writing)

% figures may not add due to rounding

Convenience Goods

11.2.4 Figure 11.1 identifies that the current proportion of convenience units in the town centre (15%) is above the UK average (9%). The position is replicated in the amount of floorspace also being higher although this is a significant difference, 45% compared to the UK average of 15%. The convenience offer comprises an Asda (6,410sq m gross), Tesco (4,090sq m gross), Lidl (1,340sq m gross), Aldi (1,080sq m gross) and Iceland (690sq m gross) foodstores. As a result, the centre has a very strong convenience offer through four national foodstore operators in addition to a number of smaller convenience/basket stores, one health food shop, an off-licence, a delicatessen, baker and butcher.

11.2.5 Since 2015, the centre has since seen an increase in the convenience goods provision of 1 unit, an African Caribbean foods convenience goods store.

Comparison Goods

11.2.6 The number of comparison goods units within Feltham is slightly lower than the UK average (29% compared to 31%). Whilst the proportion of comparison goods floorspace is also slightly below the UK average (34% to 35%). The proportion of comparison goods units remains unaltered since July 2015. The comparison goods offer includes 6 clothing and footwear retailers, comprising 6% of the total retail units, which is slightly below the national average of 7%. Of these, all are national multiple retailers.

11.2.7 Figure 11.3 shows that Feltham Town Centre contains 11 of the 31 'major retailers' defined by Experian Goad. The 'major retailers' that are not present include the department stores, clothing retailers and foodstores such as H&M, Burton and Topshop and Sainsbury's and Waitrose foodstores.

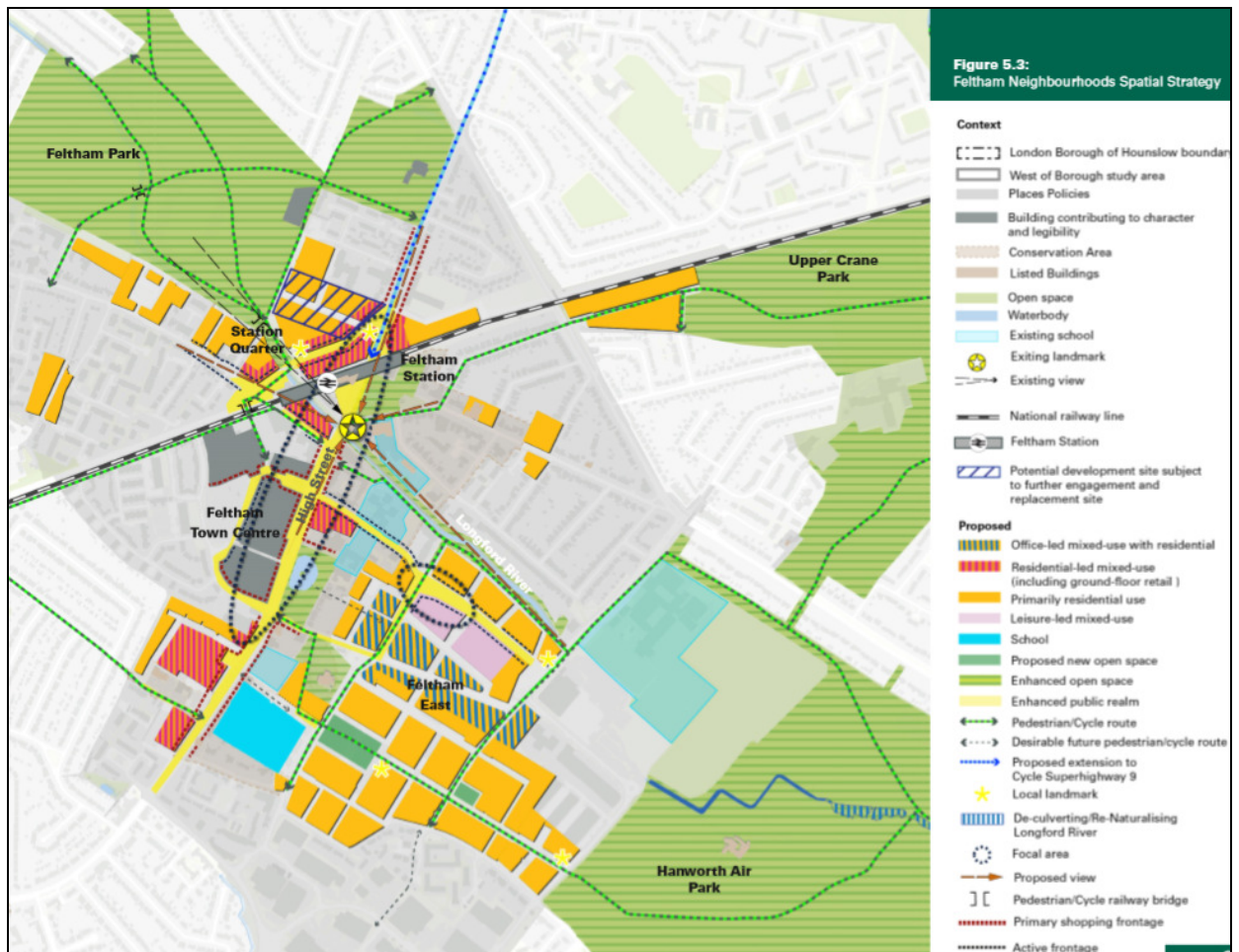
Figure 11.3: Existing Major Retailers* in Feltham Town Centre

Category	Retailers
Department	-
Mixed Goods Retailers	Boots, Argos
Supermarkets	Tesco
Clothing	Dorothy Perkins, New Look, Next
Other Retailers	Carphone Warehouse, EE, O2, Superdrug, Vodafone

*As defined by Experian Goad

- 11.2.8 Other notable national multiple retailers in the town centre beyond those defined as Major Retailers include, Shoe Zone, Select, Matalan, Dreams, Carpetright, Card Factory, Poundstretcher and JD Sports, amongst others. The majority of the retailers appear to cater towards the mid-range/value market, with a more limited number of higher end retailers. It is noted however that, there is only 1 charity shop within the town centre, representing 1% of the total unit number and is well below the UK average of 3%.
- 11.2.9 The comparison goods units are generally situated within 'The Centre' (a purpose built modern open shopping centre) in new larger retail units. Larger bulky goods retailers, including Harvey's and Bensons for Beds are also located in Manor Park Retail Park towards the southern edge of the centre.
- 11.2.10 Additional retail floorspace is proposed within the emerging WoB Local Plan Review as part of residential led-mixed use development with retail at ground floor. Figure 11.4 below illustrates the mix of uses proposed as part of the Spatial Strategy for Feltham Neighbourhoods within the emerging Plan.

Figure 11.4: Extract of Feltham Neighbourhoods Spatial Strategy from WoB Local Plan Review



Source: Figure 5.3 from emerging WoB Local Plan Review (Preferred Options October 2017)

11.2.11 In total the plan refers to around 4,000sq m new retail floorspace as part of the Station Quarter redevelopment and a further 8,200sq m retail floorspace through redevelopment and intensification of existing sites. The provision of additional floorspace could attract further national multiples to the centre and provide the opportunity to expand the existing comparison goods offer.

Retail Services

11.2.12 The provision of retail service outlets in the town centre is above the UK average in unit number (+5%) and below it in floorspace terms (-1%). The retail services currently represent 20% of the total retail units. When comparing with July 2015, there has been an increase of 1 unit, a hair salon.

11.2.13 The majority of retail services (12) are health and beauty establishments including hairdressers, beauty salon, solarium, natural therapy and tattooist, representing 11% of the total retail/leisure units. The current proportion of health and beauty units is 2% above the national average (9%). Other retail services within the centre include three opticians, two undertakers, dry cleaners, a car repair workshop, petrol filling station and a post office. The majority of the retail services within the centre are independents with the exception of the Tesco petrol station and Specsavers opticians.

Leisure Services

11.2.14 The centre contains 24 leisure services and in proportion terms is broadly in line with the UK average (23% compared to 24%). However, in floorspace terms the proportion of leisure services (9%) is substantially below the national average (25%). Since July 2015 there has been no change in the number of leisure uses within the centre.

11.2.15 There are 17 cafes, restaurants and takeaways within the centre comprising 15% of the total units, which is identical to the national average. There is a fairly good mix of uses with 7 takeaways, 6 restaurants and 4 cafes, 7 units are occupied by national operators: Subway, Costa, Domino's, McDonald's, Nando's, Starbucks and Pizza Hut.

11.2.16 Other leisure services include four betting offices (William Hill, Betfred, Coral and Ladbrokes) which is a higher proportion (4%) than the national average (1%). There is only one public house, the Moon on the Square (JD Wetherspoon) and 1 hotel, a Travelodge. The number of pubs is below the national average whilst the proportion of hotels is broadly in line with the UK average.

11.2.17 Feltham Library and Health Centre is located on the second floor of The Centre. Otherwise, the town centre does not presently benefit from any other leisure activities such as cinema, theatre or museum. However, it is noted that Leisure West situated at Air Park Way some 0.6 miles to the south east of the centre contains a Cineworld, Gala Bingo and Megabowl alongside food and drink uses.

11.2.18 In addition, it is noted that the emerging WoB Local Plan Review proposes substantial redevelopment within/adjacent to Feltham Town Centre, as shown in Figure 11.4. Leisure led-redevelopment is proposed at Feltham East on the former MoD site, Leisure West and industrial land, of around 12,000sq m leisure floorspace alongside 3,000 homes, 11,000sq m office, commercial and community facilities, a new school and 3,000sq m retail and cafes.

Financial and Business Services

11.2.19 There has been a net increase of one financial and business service unit within Feltham Town Centre since July 2015, the centre has lost an employment agency and gained a computer services shop and a solicitor. When comparing the proportion of financial and business services to the national average the number of units is just above (+2%), whilst is below in floorspace terms (-2%).

11.2.20 The financial services presently include 6 banks/building societies, all of which are national operators (Halifax, Barclays, Natwest, Santander, Nationwide and Lloyds) and a Cash Generator. The proportion of banks (6%) is above the national average (3%). The other services are: two solicitors; an estate agent; computer services; building contractor and housing specialist.

11.2.21 The financial and business services are generally located in clusters within the centre, with three units on Bedford Lane, 4 at 'The Centre', 3 on Wilton Parade and 3 on High Street to the south of Highfield Road.

Office Use

11.2.22 The Experian Goad Land Use Plan identifies that there is a 610sq m of office space within the centre. However, similar to Hounslow, the ELR identifies that office floorspace in Feltham Town Centre has not been particularly popular. It notes at present there are very few offices located within the town centre. This is supported by the Experian Goad Land Use Plan which identifies only 610sq m of unclassified office space. Existing office space, albeit predominantly of low quality, is located on upper levels of retail shops along the High Street. The Council's monitoring data shows that town centre office accommodation has been lost over recent years, most notably at 21 High Street where 2,483sq m of office floorspace was lost through change of use permitted development rights in September 2016 and Axiom House, where around 852sq m of floorspace was lost in December 2013. Similarly, in November 2014 around 857sq m of floorspace was lost at Millennium House through office to residential conversion.

11.2.23 Although located outside of the current town centre, it is noted that substantial office space (around 11,000sq m floorspace) is proposed as part of the Feltham East redevelopment scheme.

11.2.24 A focus of the emerging WoB Local Plan Review is to create job opportunities within Feltham Town Centre and proposes a substantial amount of redevelopment. Consideration should be given to the inclusion of office uses as part of the town centre redevelopment mixed use schemes proposed at Station Quarter and through intensification of existing sites.

Vacancies

11.2.25 Feltham Town Centre has a very low vacancy rate and currently only contains 1 vacant unit, representing 1% of the total number of units and only 70sq m of total floorspace. This is significantly below the UK averages of 11% and 10% respectively. The centre has seen a decline in 3 vacant units since July 2015 and around 620sq m of floorspace.

Figure 11.5: Vacancies in Feltham Town Centre

2015		2018		UK Average %
No.	%	No.	%	No.
4	4	1	1	11

Source: July 2015 Experian Goad Survey and updated by WYG May 2018
UK average figure is at February 2018
% figures may not add due to rounding

11.2.26 The unit currently vacant in the town centre, 146 The High Street, comprises 70sq m floorspace and was also recorded as vacant in July 2015. The unit is centrally located within the centre and close to a number of national multiple retailers so its long-term vacancy is surprising. Whilst a low vacancy rate is a positive it does result in there being limited medium/large units/sites within the town centre to meet any future requirements.

Operator Requirements

11.2.27 In assessing the health of centres, it is also relevant to consider which retail/leisure operators may be intending to seek representation in Feltham Town Centre in the future. Figure 11.6 identifies the retail/leisure operators and floorspace requirements listed on 'The Requirements List'.

Figure 11.6: Registered Requirements, Feltham

Name	Minimum Size (sq m)	Maximum Size (sq m)
Retail/Services		
Bensons for Beds	232	697
Evapo	14	47
SAM 99p	279	929
Supercuts	56	70
Leisure (incl. Food & Drink)		
KFC	167	325
Wadworth	167	557
Snap Fitness	372	929
Other		
Formula One Autocentres	409	648

Source: 'The Requirements List', June 2018

11.2.28 The above suggests that there is a reasonable level of demand from retail and commercial leisure operators seeking representation in Feltham. However, of the above list only 2 are comparison goods retailers, one of which is a bulky goods retailer and the other a discount retailer.

Pedestrian Flows

11.2.29 Pedestrian flows were also observed during our surveys of the centre. The town centre was busy and appeared to be popular with shoppers. Strong levels of pedestrian activity were monitored along the centre of High Street and at The Centre. Good levels of footfall were also monitored along Bedfont Lane in the vicinity of the station. Lower levels of footfall were recorded at the south and eastern periphery of the centre.

Accessibility

11.2.30 Feltham Town Centre benefits from a centrally located bus and train station situated in the northern part of the centre on Bedfont Lane. Feltham Train Station provides services into central London to London Waterloo, Reading, Windsor and Eton Riverside and Weybridge. The centre does not have an underground station and is not within the tube network.

11.2.31 The Bus Station provides stops to Kingston, Hatton Cross, Hanworth and Heathrow Airport. A number of bus stops are also situated throughout the centre along the High Street and provide services to North Brentford Quarter, Isleworth, North Feltham, Sunbury and Staines.

11.2.32 In terms of cycling, bicycle parking is generally available throughout the centre at different points along the High Street and the station. The centre does not presently benefit from dedicated cycle lanes running through the centre. We understand that improvement of pedestrian and cycling access is one of the measures proposed in the emerging WoB Local Plan Review for the town centre. During our visits, the cycle parking was in use and there were cyclists in the area.

11.2.33 Feltham Town Centre is situated on the A244 and is accessible by car from Staines Road to the north and Bedfont Road to the south west. Car parking is provided around the centre and at a number of the foodstores. The approximate number of spaces within each car park is provided in Figure 11.7.

Figure 11.7: Main Central Car Parks in Feltham Town Centre

Car Park Location	Spaces
Manor Park Retail Park	100
Tesco	370
Highfield Road (Aldi)	80
Highfield Road (NCP)	336
The Centre multi-storey	535
Bedfont Lane North	50
Bedfont Lane West	37
Feltham Bus/Train Station	40
New Road	80

**As defined by Experian Goad*

11.2.34 The NEMS household survey asked respondents how they typically travel to Feltham Town Centre. 65% of respondents indicated that they drive, with 5% indicating they find it easy to get to by car. Only 3% of respondents stated that making more parking spaces available would encourage them to visit the town centre more often.

Perception of Safety

11.2.35 During our visits to the town centre it appeared to be safe and there was limited evidence of crime, graffiti or vandalised property. We understand that the centre benefits from a CCTV camera scheme which is monitored throughout the day.

11.2.36 Following a review of the Metropolitan Police crime records, 223 incidents were reported in April 2018. Similar to the other towns within the borough, the highest crimes recorded were anti-social behaviour and violence and sexual offences (both at 25%), followed by shoplifting (9%), criminal damage and arson (8%) and vehicle crime (7%). Over the period May 2017 to April 2018 the crime rate fluctuated from between 150 incidents per month to 223 in April 2018. Although it appears that in recent months the number of incidents recorded has been increasing.

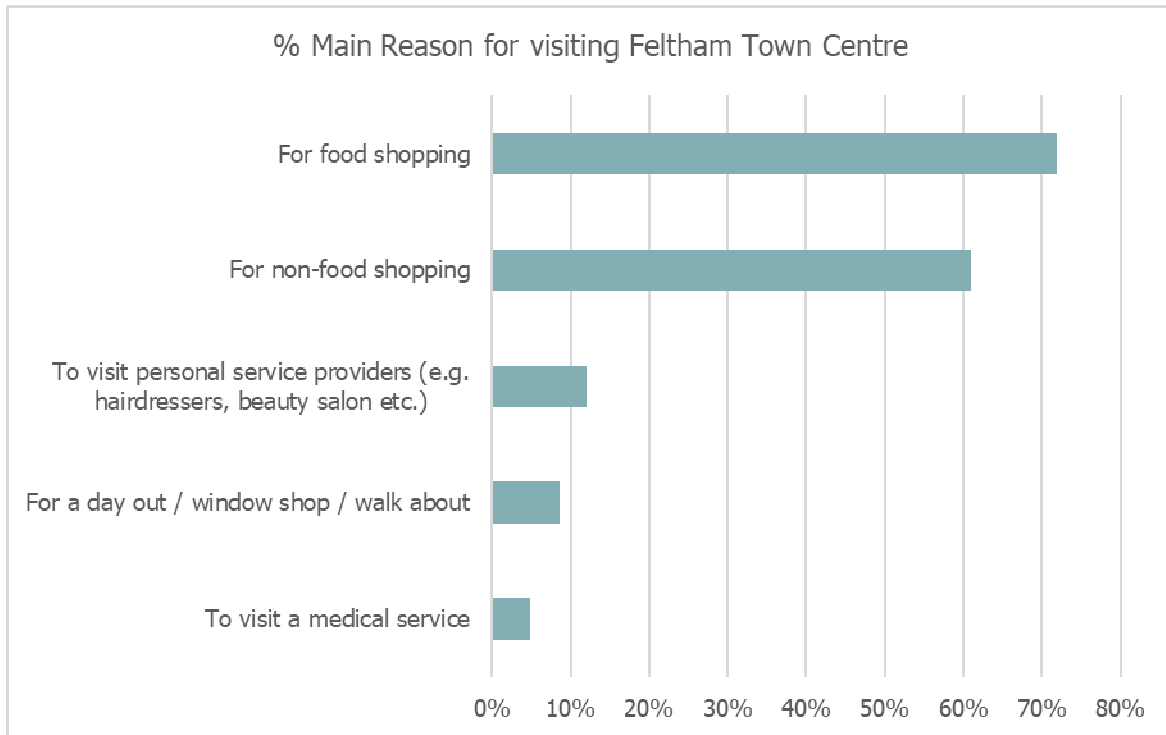
11.2.37 The NEMS household survey identified that only 2% of respondents stated better security/safety measures would encourage them to visit Feltham Town Centre more often. During our visits the town centre felt safe, albeit this was during daylight hours when there were a number of shoppers and local workers within the centre.

Views and Behaviour

11.2.38 The NEMS household survey provides information on respondent's views and behaviours regarding what they most like and why they visit Feltham Town Centre. They were also asked what measures, if any, would encourage them to visit the centre more frequently.

11.2.39 As identified in Figure 11.8 the main reason why respondents visit Feltham Town Centre is for food shopping (72%). Further main reasons identified for visiting are: non-food shopping (61%), to visit personal services such as hairdressers or beauty salons (12%); for a day out/window shop (9%); and to visit a medical service (5%).

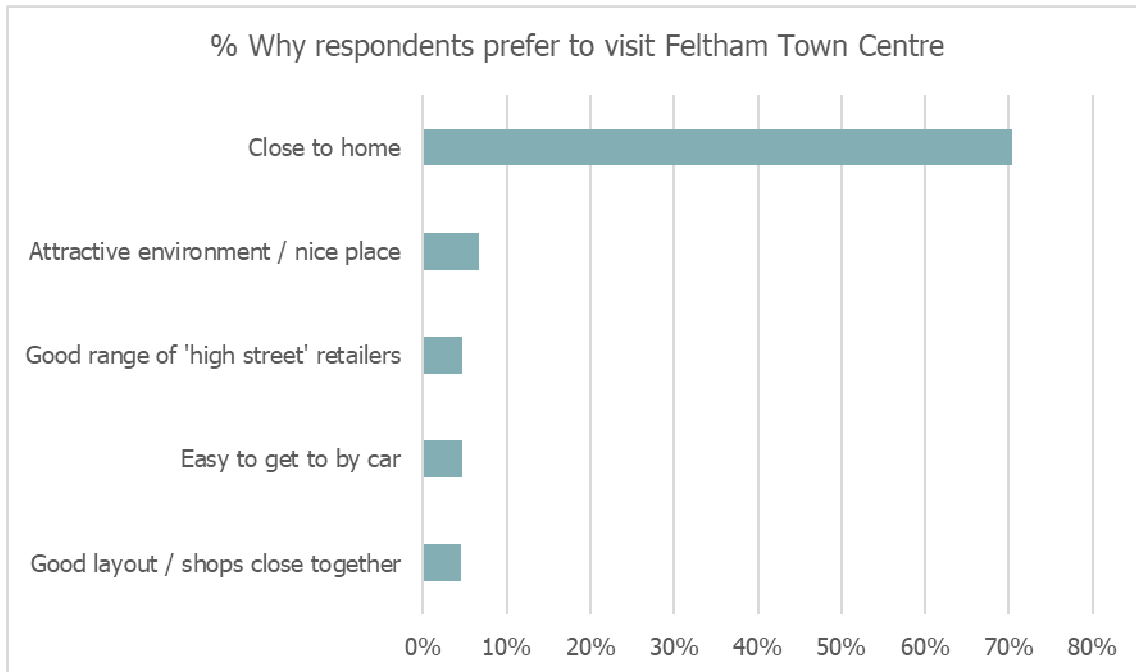
Figure 11.8: Main Reason for Visiting Feltham Town Centre



Source: Q22a and 22b (1st & 2nd mention combined), NEMS Household Survey

11.2.40 Figure 11.9 below highlights why users of Feltham Town Centre prefer to visit the centre. Over two thirds of respondents (70%) like the fact that it is close to home and convenient to get to, this was followed by those who like the town centre’s environmental quality (7%). A further 5% of respondents consider the centre has a good range of ‘high-street’ retailers; they like the fact it is easy to get to by car; and the centre has a good layout with shops positioned close together.

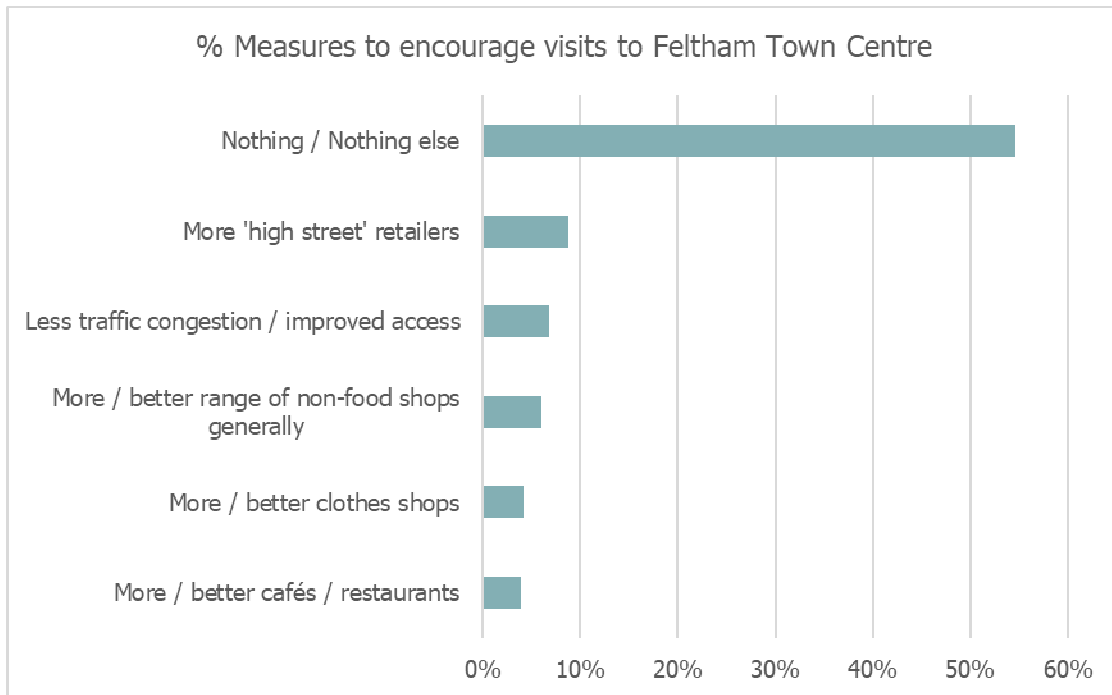
Figure 11.9: Main reason for visiting Feltham Town Centre



Source: Q23a and 23b (1st & 2nd mention combined), NEMS Household Survey

11.2.41 The measures that would encourage users of Feltham Town Centre to visit more often are detailed in Figure 11.10. The majority of respondents (55%) identified that no measures would encourage them to visit more often. In terms of actual suggested measures, the most popular response that would encourage them to visit more often was more 'high street' retailers (9%). This suggests that respondents were generally satisfied that the centre meets their needs. Other measures that were cited by respondents included: less congestion/improved access (7%), an improved/increased range and choice of non-food shops (6%), better clothes shops (4%) and more/better cafes and restaurants (4%).

Figure 11.10: Measures that would encourage visits to Feltham Town Centre more often



Source: Q24a and 24b (1st & 2nd mention combined), NEMS Household Survey

11.2.42 During our engagement with key stakeholders a number of views on Feltham Town Centre were raised. All views/feedback from key stakeholders are summarised in **Appendix B** of this study. A summary of the most common views is provided below:

- The town centre contains a good shopping area but needs better quality shops.
- There are a number of good supermarkets.
- There is a good range of affordable shops.
- The level crossing is a hazard and the walk from the station to town centre is unattractive.
- The Centre contains a range of community facilities attracting people to the town.
- Improvements to car parking facilities and safer pedestrian crossings are required.
- A greater variety of shops/restaurants are required to attract people to the centre.
- Independent retailers should be retained and attracted to the centre, so it is not dominated by national brands.
- The road layout needs to be improved to reduce congestion.

Environmental Quality

11.2.43 The environmental quality of the town is considered to be generally good with many shopfronts being attractive and of modern design, particularly those within 'The Centre'. The town benefits from wide pavements along the western side of High Street outside of the shops. To the east of High Street, Feltham

Green provides a large and attractive open green space and is situated within Feltham Town Conservation Area.

- 11.2.44 The open space provided at 'The Centre' alongside street furniture including seating, planting and lighting, creates a relaxed shopping environment and encourages shoppers to linger within the centre. The area surrounding the station and shopfronts along Bedfont Lane are more dated and of lower quality.
- 11.2.45 Although the A244 runs through the centre and high volumes of traffic were observed during our visits, this did not overly detract from the quality of the environment given the wide pavements and shopping parade on the west.

Summary

- 11.2.46 Overall, when assessed against the vitality and viability health check indicators, we consider that Feltham Town Centre is both vital and viable. Of particular note, is the strong convenience offer provided through the five foodstores and local stores. The centre also benefits from a very low vacancy rate, albeit this results in there being limited medium/large units/sites within the town centre to meet requirements.

11.3 Qualitative Need Summary

- 11.3.1 The qualitative need for additional convenience and comparison goods retail and other main town centre facilities within Feltham Town Centre are summarised below.

Convenience Goods

- 11.3.2 The quantitative assessment identifies that the majority of foodstores in Feltham are under trading, which is likely to be due to the high number of foodstores present. Feltham has a strong retention rate from its 2 closest zones (Zones 2 and 3) with 89% of main food shopping trips undertaken in Feltham from Zone 2 and 64% from Zone 3. Given the foregoing we consider that there is not a qualitative deficiency of convenience goods provision or need for additional floorspace.

Comparison Goods

- 11.3.3 In terms of comparison goods, the health check assessment identifies that the proportion of comparison goods units and floorspace is generally in line with the national average. When reviewing the market share of comparison goods it is apparent that the town centre captures around 40% of trips from its 'local zones'. The household survey and stakeholder engagement responses identified that the town centre could benefit from a greater range of non-food shops, better clothes shops and more 'high street' retailers.
- 11.3.4 We consider that Feltham Town Centre could benefit from improving its comparison offer. We note that Feltham Town Centre is the only town centre located within the WoB Local Plan Review where substantial improvements and redevelopment is proposed. Draft Policy P1 makes reference to redevelopment of the area around the station for mixed-use development including 4,000sq m retail/commercial floorspace,

whilst redevelopment and intensification of existing town centre sites are planned to provide around 8,200sq m new retail floorspace. We consider that this will address the current qualitative need for additional comparison goods floorspace within the centre.

Other Main Town Centre Uses

- 11.3.5 The retail services within the town centre contain a mix of uses, although the majority of which are health and beauty establishments. Given the existing provision it is not considered that there is a general qualitative need for additional retail services within the centre. However, it is noted that the town centre does not currently benefit from clothing hire, photo processing/studio, travel agents or vehicle rental. Additional services may be accommodated in the retail floorspace proposed within the emerging WoB Local Plan Review.
- 11.3.6 The leisure provision within the town centre is substantially below the national average when comparing floorspace and it does not presently benefit from a cinema, theatre or museum. However, Leisure West is located in close proximity to the town centre (approximately 320m, 5 minutes walking distance), providing a cinema, ten-pin bowling and a number of restaurants. A substantial amount of additional leisure floorspace is also proposed at Leisure East. Nevertheless, following our high-level assessment, it is still considered that there is presently a qualitative deficiency of leisure floorspace within Feltham Town Centre itself and this should be reviewed by the Council and addressed, as necessary, through the WoB Local Plan Review.
- 11.3.7 The town centre currently only contains 1 hotel (Travelodge) when comparing this with the national average it is roughly in proportion. Additional hotel provision is proposed within the emerging WoB Local Plan in the Heathrow Gateway area (approximately 2 miles from Feltham Town Centre) alongside the potential restoration of Hanworth House for a hotel. On this basis, we do not consider there is currently a qualitative need for additional hotel provision or bedspaces within Feltham Town Centre.
- 11.3.8 The proportion of financial and business services is broadly comparable to the national average with the centre providing a strong provision of banking facilities. Overall it is considered that there are no obvious qualitative deficiencies in the financial and business service provision in the town centre.
- 11.3.9 The level of office floorspace identified within Feltham Town Centre is low (600sq m). The ELR notes that existing office floorspace in the town centre is not popular. It is recommended that the Council monitor the provision of office accommodation within the town centre to ensure there remains an adequate supply.

12.0 Key Findings and Recommendations

12.1 Introduction

12.1.1 This section contains the key findings of the study and provides recommendations in relation to the identified need, demand from operators and the retail/leisure policy approach within the adopted and emerging Local Plans that would support the vitality and viability of the four town centres.

12.2 Summary of Identified Need

Convenience Goods

12.2.1 The study identifies that, with the exception of Feltham, there is capacity for additional convenience goods floorspace in the towns within the Borough. The lack of capacity within Feltham is primarily due to the existing convenience goods provision in the town. Our assessment has identified that most of the existing foodstores in Feltham are currently under trading which suggests that there is an overprovision of convenience goods facilities. In Brentford, assuming the Waterside redevelopment commitment is implemented the convenience goods capacity of the town centre is absorbed.

12.2.2 The convenience goods residual expenditure and floorspace capacity figures for Hounslow, Chiswick and Brentford are summarised in Figure 12.1 below.

Figure 12.1: Quantitative Need for Convenience Goods Floorspace

Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement (sq m net)	
	£m	£m	£m	Min	Max
Hounslow					
2022	17.1	N/A	17.1	1,400	1,700
2027	19.2	N/A	19.2	1,600	1,900
2029	20.0	N/A	20.0	1,700	2,000
2033	21.4	N/A	21.4	1,800	2,200
Chiswick					
2022	5.2	N/A	5.2	400	500
2027	7.0	N/A	7.0	600	700
2029	7.7	N/A	7.7	600	800
2033	8.8	N/A	8.8	700	900
Brentford					
2022	11.7	15.7	-3.9	-	-
2027	13.6	15.7	-2.1	-	-
2029	14.4	15.7	-1.3	-	-
2033	15.7	15.7	-0.1	-	-

Notes:

Minimum Floorspace Requirement - Average sales density assumed to be £11,952 per sq.m is based on the average sales density of the leading four supermarkets - derived by Global Data

Maximum Floorspace Requirement - Average sales density assumed to be £9,886 per sq.m is based on the average of discount operators (Aldi & Lidl) - derived from Global Data 2016 Prices

12.2.3 Turning to qualitative need, following the health check assessments and review of market share patterns, we do not consider that there is qualitative need for additional convenience goods floorspace within Hounslow, Chiswick or Feltham. The assessment identifies that Brentford could benefit from further convenience goods provision. Assuming the foodstore element of the Brentford Waterside scheme is delivered this will help to meet the need.

Comparison Goods

12.2.4 The comparison goods capacity for each town is summarised in Figure 12.2.

Figure 12.2: Quantitative Need for Comparison Goods Floorspace

Year	Surplus	Commitments	Residual	Floorspace Requirement (sq m)	
	£m	£m	£m	Min	Max
Hounslow					
2022	11.1	33.2	-22.1	-3,900	-6,900
2027	31.3	37.1	-5.8	-900	-1,600
2029	40.0	38.8	1.3	200	300
2033	61.7	42.3	19.4	2,700	4,700
Chiswick					
2022	4.8	N/A	4.8	900	1,500
2028	13.6	N/A	13.6	2,200	3,800
2029	17.4	N/A	17.4	2,600	4,600
2033	26.8	N/A	26.8	3,700	6,500
Brentford					
2022	3.5	25.4	-21.9	-	-
2028	10.0	28.5	-18.5	-	-
2029	12.8	29.7	-16.39	-	-
2033	19.7	32.4	-12.7	-	-
Feltham					
2022	5.2	N/A	5.2	900	1,600
2028	14.7	N/A	14.7	2,300	4,100
2029	18.8	N/A	18.8	2,900	5,000
2033	28.9	N/A	28.9	4,000	7,000

Notes:

Minimum Floorspace Capacity - 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 the towns.

Maximum Floorspace Capacity - Average sales density assumed to be £5,250 per sq m which WYG considers to be towards the lower end of what could be achieved in the towns.

Assumes constant market share of Study Area expenditure claimed by facilities in each town.

2016 Prices

-
- 12.2.5 As a large Metropolitan Centre, the majority of comparison goods floorspace capacity is identified in Hounslow (between 8,600sq m and 15,000sq m net by the end of the plan period). However, assuming the High Street Quarter redevelopment is built out, this reduces the floorspace requirement to between 2,700sq m and 4,700sq m net by the end of the plan period. The High Street Quarter redevelopment will also help to meet the current qualitative need identified by this study and will provide the opportunity to deliver additional comparison goods floorspace and attract new retailers to the town centre.
- 12.2.6 A relatively large level of comparison goods floorspace capacity is identified for Chiswick (between 3,700 and 6,500sq m net) and Feltham (4,000-7,000sq m net) by the end of the plan period. We are not aware of any relevant commitments that need to be considered in these towns. In qualitative terms, we consider that Chiswick Town Centre could benefit from an increase in the comparison goods provision to offer a greater variety of retailers and become more of a comparison goods shopping destination maximising on its independent offering. Similarly, Feltham Town Centre could benefit from improving its comparison offer and provide a greater range of comparison goods, with a specific emphasis on clothing and footwear requested by residents and stakeholders.
- 12.2.7 In terms of Brentford, any identified floorspace capacity is absorbed by the Waterside redevelopment scheme. At present, there is a qualitative need to improve the comparison goods offer within the town, in terms of the amount, type and choice resulting in the town having a low market share and negative feedback from local stakeholders. If delivered, the Waterside redevelopment provides the opportunity to address the qualitative need and improve the appearance of the centre. Albeit it is noted local stakeholders wish to ensure the redevelopment retains the 'individuality' of the town centre.
- 12.2.8 As a result of the findings of this study, we would recommend that the Council identify suitable sites in accordance with the sequential approach to site selection for the identified future floorspace capacity. The revised NPPF identifies at paragraph 85 that planning policies should allocate a range of suitable sites in the town centres to meet the scale and type of development likely to be needed, looking at least 10 years ahead. Given the level of identified comparison goods need, it is likely that more than one site will need to be identified for the towns of Chiswick and Feltham. For Feltham, the emerging WoB Local Plan Review proposes the redevelopment of the area around the station to create a new high-density mixed-use development (the Station Quarter) which will include 4,000sq m of retail and commercial uses and redevelopment and intensification of town centre sites to provide around 8,200sq m new retail floorspace.
- 12.2.9 A proportion of convenience goods floorspace identified for the town centre of Brentford could be accommodated within the new local centre planned at Lionel Road. Comparison goods and main leisure floorspace should however be promoted within existing designated town centres.

Other Main Town Centre Uses

- 12.2.10 This study also considers the qualitative need for other main town centre uses including food and drink uses, leisure establishments, hotels and office uses. This section summarises the main findings in relation to the other main town centre uses for each of the town centres within the Borough.
- 12.2.11 For Hounslow Town Centre it is considered that the existing service provision alongside the proposed retail and leisure services as part of the High Street Quarter redevelopment scheme results in there being no qualitative need to plan for any additional A3/A4/A5 or cinema uses within the town centre. The existing hotel provision is considered to be healthy and the GLA notes the town centre a high number of bedspaces. Office floorspace within the centre is not particularly popular, as reported in the ELR with many offices converting to residential use through permitted development rights. The recent Article 4 direction removing permitted development rights should help to reduce such losses in future. Nevertheless, the office provision needs to be carefully monitored to ensure an appropriate level of supply remains available.
- 12.2.12 Chiswick Town Centre has a strong food and drink offer and offers a variety of restaurant and café/coffee shops. There is not considered to be a qualitative need for additional food and drink establishments. The assessment undertaken as part of this study identifies that there is a deficiency in terms of hotel provision within Chiswick Town Centre and a qualitative need to improve the existing offer. In addition, there is also no cinema or large scale commercial fitness centres. Whilst there is not considered to be a strong need for such facilities at present, it is noted that the provision of both leisure activities and fitness centres could be improved/enhanced within the centre. Similarly, the existing financial and business service sector meets current requirements, although there is a high proportion of estate agents/property services. Turning to office space, the ELR notes that Chiswick Town Centre generally has a successful office market. The study recommends that a detailed review should be undertaken to determine the quality and availability of the unclassified office space within the town centre in order to determine its potential contribution to the Borough's office space requirements.
- 12.2.13 Within Brentford Town Centre, the proposed Waterside redevelopment is considered to provide the opportunity to meet outstanding requirements for additional retail and leisure services. It is noted that the retail and financial and business services could benefit from diversification to include a better mix of services to ensure they are not dominated by hair and beauty establishments and estate agents respectively. There is not considered to be a need for additional hotels or cinemas within the town centre with the existing provision appearing to meet the present need. Office floorspace within the centre is noted within the ELR to be secondary older stock and unattractive to potential occupiers, the planned additional floorspace as part of the Waterside redevelopment will help to provide additional modern office floorspace.

12.2.14 The proportion of leisure floorspace within Feltham Town Centre is substantially below the national average, with the leisure services predominantly comprising takeaways and coffee shops. Additional existing leisure uses are located just outside the centre at Feltham West and additional leisure floorspace is proposed in the emerging WoB Local Plan Review at Feltham East. Based on the existing provision, health check assessment and stakeholder feedback, the study identifies that there is qualitative need to improve the leisure provision within the town centre. Therefore, we suggest the Council should consider options to accommodate this as part of the town centre regeneration proposals. The hotel provision is in line with the national average and as such we consider there is no strong qualitative need to provide additional hotel provision within the town centre at present. Similar to Hounslow and Brentford, the ELR notes that existing office accommodation within Feltham Town Centre is not popular. Nevertheless, the supply needs to be carefully monitored to ensure an appropriate level and quality of accommodation remains available.

12.3 Identified Demand from Operators/Businesses

12.3.1 The identified demand from national retailers/operators for each town is summarised in Figure 12.3 below. Operators comprise a mix of convenience, comparison and commercial leisure uses. The summary table below does not include 'other uses'.

Figure 12.3: Demand from New Operators

Hounslow			
Lidl	Five Pound World	GDK	Second Cup
Savers	Tapi Carpets	Habit Burger	City Slots
Bensons for Beds	Pavers	Fat Burger	Snap Fitness
Sainsbury's Local	Priority Plumbing	KFC	
Cigara	Mail Boxes etc	Chip Nation	
Chiswick			
Lidl	Supercuts	We Brought Beer	Pets at Home
One World	Mind	Steak N' Shake	Coffee Republic
Oasis	Revital	Fat Burger	Caffe Nero
Jones Bootmaker	Regional Estate Agents	Five Guys	Chip Nation
Happy Socks	European Optical Chain	Fego Cafe	Second Cup
British Heart Foundation (Clothing)	Tapi Carpets	Veeno	Orangetheory Fitness
British Heart Foundation (Furniture & Electrical)	Metropolitan Safe Deposits	Brunning & Price	My Gym
Bensons for Beds	Topps Tiles Boutique	Sushi Shop	EasyHotel
Between The Lines	Topps Tiles	Wayne's Coffee	Hub Hotel
Vapejoy	Wooden Floor Store	Suda	Travelodge
Brentford			
Bensons for Beds	Savers	Mind	Snap Fitness
Lidl	Supercuts	KFC	Travelodge
Feltham			
Bensons for Beds	SAM 99p	KFC	Wadworth
Evapo	Supercuts	Snap Fitness	

Source: 'The Requirements List'

12.3.2 In general, there is adequate demand from national retail/commercial leisure operators seeking representation in the Borough. However, for its size there is fairly limited demand from national comparison goods retailers seeking presence in Hounslow, which is surprising given its designation as a Metropolitan Centre and it is the main shopping destination within the Borough. Based on published national retailer/leisure operator requirement data, there is a greater demand from operators seeking premises in Chiswick (Major Centre), although again it is noted only a limited number are clothing/footwear retailers.

12.3.3 For their size and role Brentford and Feltham has a reasonably low level of demand from operators. However, with the exception of Lidl, it is not considered that the above operators would be significant attractors to the Waterside redevelopment scheme in Brentford.

12.4 Review of Relevant Retail Policy

12.4.1 We have undertaken a review of relevant existing retail/leisure policies in the Local Plan 2015-2030 and make recommendations on the following for inclusion in the emerging Local Plan Reviews:

- Town Centre Hierarchy;
- Local Retail Impact Assessment Threshold; and
- Town Centre Boundaries and Shopping Frontages.

12.4.2 Each of which is considered below.

Town Centre Hierarchy

12.4.3 Paragraph 85 of the NPPF requires planning policies to define a network and hierarchy of centres in a way that can respond to rapid changes in the retail and leisure industries.

12.4.4 Adopted Local Policy TC1 identifies the town and neighbourhood centre network, with Hounslow identified as a Metropolitan Centre, Chiswick a Major Centre and Brentford and Feltham District Centres. However, the London Plan identifies the upper tiers of the network (Major and above) and therefore any changes to the designations of Hounslow Metropolitan Centre and Chiswick Major Centre need to be co-ordinated through the London Plan. The assessment undertaken as part of this study, identifies that whilst Hounslow Town Centre is the main shopping destination within the borough, all of the centres function as town centres and meet the shopping and service needs of the residents of the towns and their catchment areas.

12.4.5 Accordingly, we consider that the hierarchy within Local Plan Policy TC1 is still relevant and Feltham and Brentford should continue to be designated as District Centres for retail purposes.

Local Retail Impact Threshold

- 12.4.6 We also provide recommendations on relevant retail impact assessment threshold/s to be included within the emerging Local Plan Reviews.
- 12.4.7 National planning policy states it is appropriate to identify locally set thresholds for the scale of edge-of-centre and out-of-centre retail development which should be subject to the assessment of the impact criteria set out by paragraph 89 of the NPPF. The NPPF sets a default retail impact threshold of 2,500sq m gross. The NPPG explains that gross retail floorspace is defined as "*the total built floor area measured externally which is occupied exclusively by a retailer or retailers, excluding open areas used for the storage, display or sale of goods*" (paragraph 16).
- 12.4.8 At present Policy TC3 the adopted Local Plan set a local retail impact assessment threshold and requires development proposals of over 500sq m retail floorspace or 2,500sq m of other main town centre uses floorspace proposed outside of the town centres will to be accompanied by an impact assessment.
- 12.4.9 When setting a locally appropriate threshold, the NPPG considers the following aspects important:
- Scale of proposals relative to town centres;
 - The existing viability and vitality of town centres;
 - Cumulative effects of recent developments;
 - Whether local town centres are vulnerable;
 - Likely effects of development on any town centre strategy; and
 - Impact on any other planned investment.
- 12.4.10 The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate in practice.
- 12.4.11 Following the assessment undertaken within this study and having regard to, *inter alia*, the current health of the town centres; performance of the town centres; retail unit and floorspace composition of each of the town centres; increasing competition from the internet; and availability of units in the prime shopping area capable of meeting potential national multiple occupiers in each of the centres, WYG consider that the existing threshold of 500sq m for retail floorspace proposed outside of designated centres is appropriate. This should continue to provide the Council with sufficient flexibility to assess the merits and potential impact implications of edge and out-of-centre retail applications. Accordingly, we do not propose an amendment to the threshold within the Adopted Local Plan Policy TC3.

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- 12.4.12 It is important to stress that whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

Town Centre Boundaries and Shopping Frontages

- 12.4.13 The NPPF (Chapter 7) aims to boost the vitality of city, town, district and local centres. Paragraph 85 of the NPPF states that planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. In doing this, planning policies should:

"Define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;"

- 12.4.14 Frontage designations are the most important mechanism for ensuring retail and commercial leisure uses (particularly A1 uses) are both maintained and allowed maximum opportunity to develop within the town centre. The NPPF does not specify acceptable proportions of retail and non-retail in these frontages, as it is a matter for Local Planning Authorities to decide. The frontage designations should promote the vitality and viability of town centres and provide high quality and accessible retail services.
- 12.4.15 The existing Policies Map defines Town Centre Boundaries, Primary Shopping Areas, Primary Shopping Frontages and Secondary Shopping Frontages for each of the centres. Adopted Local Plan Policy TC4 seeks to manage uses in the town centres and retain a high proportion of A1 uses in primary frontages and shopping areas. As part of this study, WYG has reviewed the existing town centre boundaries and frontages. Our review has had regard to our vitality and viability health checks and detailed analysis of each town centre.
- 12.4.16 We consider that the existing boundaries, shopping area and frontages are sufficient for the town centres of Hounslow, Chiswick and Brentford. However, for Feltham it is recommended that the town centre boundary, and possibly Primary Shopping Area, be reviewed and amended in order to accommodate additional retail and leisure development planned as part of the Station Quarter redevelopment identified in emerging Policy P1 within WoB Local Plan Review.

Glossary of Terms

Capacity	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
Comparison Goods	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods.
Convenience Goods	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.
District Centre	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
Expenditure Per Capita	The average spend of each person within the defined Study Area on a variety of retail goods.
Expenditure	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
Expenditure Forecasts	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 14 (November 2016).
Experian (MMG3)	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
Gross Floorspace	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
GOAD Plans	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.
GOAD Reports	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
Local Centre	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could

include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

Net Floorspace	Represents the level of internal area devoted to the sale of goods.
Market Share	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
National Multiple	This is a retail or service operator which is or part of a network of nine or more outlets.
Price Base	The price base for the Study is 2015; all prices are or have been adjusted to 2015 in order to be consistent.
Rates of Productivity	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
Sales Density	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
Special Forms of Trading	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
Study Area	This represents the household survey area, which is based on postal sectors.
Trade Draw	This refers to the level of trade attracted to a particular facility/centre.
Turnover	The turnover figure relates to the annual turnover generated by existing retail facilities.
Town Centre	A town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.