London Borough of Hounslow
Retail and Town Centre Needs Study Update 2018
Stakeholder Feedback Form

Please return this feedback form to zoe.james@wyg.com by 29th May 2018.

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Please tick the relevant box below indicating which town centre your comments relate to. Please feel free to complete more than 1 form should you have comments on more than 1 town centre.

Hounslow	**X**	Brentford	
Chiswick		Feltham	

What do you consider the existing strengths in the above centre are?
There seem to be very few strengths – as witnessed by retailer 'flight' on the part of prestigious national chains. These departures date back over many years and pre-date the current pressures on high street retailing. Hounslow's status in the London Plan as a 'Metropolitan Centre' for retail and/or leisure purposes is no longer justified by reality. The town centre will continue to have some strengths providing it contains its ambitions to catering for the retail and leisure needs of its immediate residents, and especially those who do <u>not</u> commute to work elsewhere. A role which more closely equates to that of a 'District' or possibly 'Medium' centre according to the London Plan retail hierarchy definitions.
What do you consider the weaknesses in the above centre are?
There already is an oversupply of retail floorspace in Hounslow Town Centre. The presence of suboptimal lettings to down-market retailers merely exacerbates the town centre's lack of attractiveness to consumers with disposable incomes. The town centre has <u>not</u> fulfilled the role of a destination retail and/or leisure centre for many years. Constructing additional retail floorspace will merely exacerbate the existing problems of overcapacity. Consumers cannot be compelled to visit a failing town centre.

What do you consider the potential opportunities are for the above centre?
The town centre needs to recognise reality and redefine its status and role so that it reflects todays, and the foreseeable, physical retail and leisure environment.

What do you consider the potential threats are for the above centre?

The greatest threat would be a failure to recognise and respond to the sustained reality of 'The Market'.

The town centre's current circumstances have arisen despite energetic interventions over many years by the Council and the planning regime.

It is therefore now time to honestly assess why major retailers such as Marks & Spencer have withdrawn (after first down-grading their store to a discount remainder branch) and why those residents with disposable funds choose to shop elsewhere and/or on the internet.

Particular threats are **Demographic** and **Retail Changes**. These include:

- Relocation to the home counties etc. (and death) of those former residents with surplus consumption expenditure who used to look on Hounslow as their retail and/or leisure destination centre.
- Consolidation of destination retail into fewer and larger centres, e.g. **Kingston** and more recently **Westfield White City**. Both of which benefit from a branch of John Lewis.
- Closure of retail and leisure outlets in what are perceived as failing town centres.
- Massive increase in online shopping.
- Lack of an adequately large and well paid local employment market – which means that the overwhelming majority of the new residents do not, and cannot, work in or near the town centre. The days of large headquarters buildings in Hounslow appears to be over. What new headquarters buildings there are, now tend to be located further out along the M4 and M3 corridors.
- The overwhelming majority of new residents will commute to work elsewhere and will only regard the new housing as dormitory accommodation. Much of their lives and physical consumption expenditure will take place away from the town centre.
- Sustained squeeze over ten years on real incomes.
- Pressure on disposable incomes due to high levels of consumer borrowing.
- Pressure on disposable incomes due to changes in the employment market, e.g. zero-hours and part-time contracts.

Transport
It is essential that the significant impacts of transport connectivity are fully appreciated.

Many, if not all, of the new residents will commute to work away from Hounslow Town Centre. This means that the majority of their non-internet consumption expenditure is likely to be spent elsewhere, possibly by interrupting their commute journey on the way home, e.g. in the West End or at Westfield White City.

Given today's extended hours working culture - what leisure expenditure there is likely to be incurred with work colleagues and, given the diverse commuting patterns of those colleagues, is therefore likely to be close to the places of employment.

Key improvements to bus connectivity have further weakened the attractiveness of Hounslow Town Centre. The 237 provides direct access to **Chiswick** and **Westfield White City**, while the E8 now connects directly to **Ealing Town Centre**.

Car users are able to benefit from paid parking at the nearby town centres of **Kingston**, **Richmond**, **Westfield White City** and **Uxbridge**.

A further nearby competitor is the **Kew Retail Park** with its free car parking and a large Marks & Spencer anchor.

Competition
The town centre cannot be considered in isolation.

It is part of a dynamic network of competing locations in West London – each of which is energetically seeking to retain and increase its market share of retail and leisure spend.

It will be extremely challenging to 'win back' the consumer spend which has been lost to rival centres.

Do you have any suggestions of ways to improve the above centre?

Having worked at a multinational headquarters in Hounslow for four years in the 1980's, and closely followed the town centre's fortunes ever since, it is difficult to identify any growth orientated suggestions which stand a realistic chance of success in the foreseeable future.

While a material quantum of subsidised 'start-up' units would be highly beneficial – it is difficult to see how such a genuine regeneration and employment initiative on the scale desired could be funded.

It would be beneficial if there was a strong cultural and leisure anchor, with associated car parking. An enhanced version of the cinema complex adjoining The Chimes shopping centre in Uxbridge provides a nearby example: https://intu.co.uk/uxbridge/centre-information This could be complemented by a theatre, possibly along the lines of Questors in Ealing: http://www.questors.org.uk/ This could accompanied by seminar rooms and rehearsal studios. If a hotel was included it could become an integrated conference venue.

More modestly, the shopfront refurbishment programme in Uxbridge is worth a look. There's more at: https://www.hillingdon.gov.uk/article/32115/Uxbridge-Town-Centre---Shop-front-grant-scheme

The most responsible thing to do would be to advise the Council to realistically study and analyse the reasons for the retail deterioration of the town centre since the early 1980's and to then evolve a strategy which is based on reality, rather than wishful thinking.

There clearly is tremendous scope for a more modest offer which honours and reflects the cultural richness and diversity of the residents of the surrounding area.

The most important thing to do is to restrain retail and leisure floorspace to a level which will match future demand and also avoid the 'blight' of either boarded-up premises or lettings to downmarket retailers and/or leisure activities.

Appendix

There needs to be a detailed and forensic analysis of the consumption patterns of existing and future residents. This will be essential in quantifying future retail and leisure demand.

The analysis needs to identify existing and future physical shopping and leisure 'inflows and outflows'.

The analysis needs to segment existing and future consumption by consumer categories using, for example, the MOSAIC and/or ACORN classifications.

Attributing current average spending patterns to future residents is misleading. The demographic and financial circumstances of the new residents will be different. Hence the need to prepare a segmented analysis.

Realistic estimates of consumer debt and future consumption spending need to be prepared for each resident segment. This should be prepared separately for the existing residents and the future residents.

The implications of commuting patterns and transport accessibility need to be incorporated into these segmented projections.

The continuing expansion of internet shopping, by market segment, needs to be assessed – as this is likely to result in a reduced demand for the existing floorspace, even after the arrival of significant numbers of additional commuter residents.