

# 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](mailto:zoe.james@wyg.com) by 29<sup>th</sup> May 2018.

<b>Name</b>	James Guest FCA MBA
<b>Company/Association</b>	Windmill Road Residents' Association & Ealing Fields Residents' Association
<b>Contact Email</b>	jg@jamesguest.plus.com

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	<input type="checkbox"/>	Brentford	<input checked="" type="checkbox"/>
Chiswick	<input type="checkbox"/>	Feltham	<input type="checkbox"/>

#### What do you consider the existing strengths in the above centre are?

There seem to be very few strengths to the current retail and leisure offer of the current town centre.

In part this is due to what could be described as 'planning blight'.

It is also overwhelmingly attributable to the consolidation which has taken place over many years in high street retail, with shoppers preferring the greater offer available in larger nearby retail centres and multiple retailers withdrawing from secondary and tertiary town centres.

#### What do you consider the weaknesses in the above centre are?

There is very little employment remaining in the town centre, with virtually all the larger employers having closed down or departed. This means that the majority of local residents commute to work elsewhere and what firms remain do not 'import' sufficient commuting employees to generate meaningful expenditure in the town centre.

The town centre is too far from the offices and employers on the Great West Road for their staff to visit the town centre during their lunch breaks on a regular and extended basis. It also should be noted that the majority of these employees commute to work by car, rail, tube or bus and therefore have the opportunity to shop elsewhere.

The town centre is physically constrained by the river to the south and the railway line and A4/M4 to the north. This restricts the size of its 'walk in' catchment area.

A significant number of middle aged and retired residents live in or near the town centre. Their



# London Borough of Hounslow

## Retail and Town Centre Needs Study Update 2018

### Stakeholder Feedback Form



circumstances inherently limit their consumption expenditure.

A further constraint on consumption spending is the significant number of social housing residents with their limited disposable incomes.

Recent regeneration proposals and planning decisions are unlikely to enhance the attractiveness of the town centre, and will therefore fail to attract out-of-town shoppers and retailers.

The opportunity to emulate nearby Richmond-upon-Thames with its Quinlan Terry river front regeneration, albeit on a more modest scale, has been lost. See: [http://www.richmond.gov.uk/model\\_of\\_the\\_quinlan\\_terry\\_riverside\\_development](http://www.richmond.gov.uk/model_of_the_quinlan_terry_riverside_development)

Those Brentford residents with disposable incomes now have long established alternative shopping patterns which are unlikely to be modified by the envisaged additional and replacement floorspace.

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 today's, and the foreseeable, physical retail and leisure environment.

It should seek to maximise what advantages can be retrieved from the insensitive over-development of its canal and river front heritage.

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 constrained footprint of the town centre and the reality of market pressures on retail in tertiary shopping centres.

A further threat would be the misguided and delusional belief that high density housing developments will succeed in attracting up-market shops and in retaining them after the conclusion of initial rent 'holidays' and inducements.

The downsizing of the **Waterman's Art Centre** in its new back land location will further reduce the attractiveness of what had been a river front destination for visitors to the town centre.

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

- 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.



# London Borough of Hounslow

## Retail and Town Centre Needs Study Update 2018

### Stakeholder Feedback Form



- 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 along the nearby Great West Road appear to be nearly 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 in Brentford 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 Brentford. 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 - their 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.

Bus connectivity has significantly weakened the attractiveness of Brentford as a retail and/or leisure centre. The 237 provides direct access to **Chiswick** and **Westfield White City**. The E2 and E8 connect directly to **Ealing Town Centre**. The 65 route provides direct access to **Richmond** and **Kingston**.

It should be noted that both **Ealing** and **Chiswick** are far more accessible to Brentford residents by public transport than they are to Hounslow residents. The competitive challenge is therefore much greater.

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

A particular 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 for Brentford 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?

Given Brentford's historic location as a base for river and canal-based craft and service industries – there would be considerable sense in including a material quantum of subsidised 'start-up' units. However, it is difficult to see how such a genuine regeneration and employment initiative on the scale desired could be funded.

As mentioned, the existing river front **Watermans Art Centre** provides a major attraction. It would be highly beneficial if this could be retained on a river frontage and not reduced in capacity. Opportunities for joint working with the drama departments of local schools and as a rehearsal space for the Sky Studio Complex at Gillette Corner should also be investigated.

More modestly, the shopfront refurbishment programme in Uxbridge should be emulated. 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 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 Brentford's rich heritage as a river and canal location.

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.



# London Borough of Hounslow

## Retail and Town Centre Needs Study Update 2018

### Stakeholder Feedback Form



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 existing 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.

