Retail and Town Centres Study

Stage 2 Report

March 2018

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1. Introduction

1.1 In March 2017, the London Borough of Ealing (LB Ealing) published the 'Ealing Town Centre Retail and Leisure Study'. The report sets out the role and status of Ealing Metropolitan Centre within the wider sub-regional and London-wide context, and provides a more detailed analysis of the town centre's health and performance. The outputs from the Stage 1 Study drew conclusions in respect of the overall performance of Ealing Metropolitan Centre, and future requirements in respect of investment, development and change in order to retain Metropolitan Centre status.

1.2 Urban Shape are instructed by the London Borough of Ealing to prepare the Stage 2 'Ealing Retail and Leisure Study'. This is a borough-wide evidence based report into the qualitative and quantitative performance of the full network of town centres, the scope for new floorspace, and the identification of a suitable strategy for each centre to facilitate future enhancement, growth and change. This builds upon the Stage 1 study and sets out retail demand for the whole Borough including Ealing Metropolitan Centre. The reports should be read alongside each other.

1.3 The outputs are informed by a new household telephone survey covering 1,200 households located within 12 survey zones across LB Ealing and neighbouring areas (Plan 1). Urban shape designed the survey questionnaire in collaboration with LB Ealing, whilst NEMS Market Research undertook interviewing and data processing in May 2017. The findings from the household telephone survey are used to identify where residents in the survey area are undertaking their food and non-food shopping, where they are travelling for commercial leisure activities, and what residents like and dislike about the town centres in the Borough.

Structure of report

1.4 The Stage 1 report focuses on Ealing Metropolitan Centre, including policy framework, Metropolitan Centre qualitative health check and Metropolitan Centre benchmarking with the wider London network. Stage 2 widens the analysis to the whole Borough and includes additional data for Ealing Metropolitan Centre.

1.5 This Stage 2 report is structured as follows:

- Section 2 summarises the national, strategic and local planning policies relevant to retail and town centre uses in LB Ealing.
- Sections 3-6 review the composition, role and function of Southall Major Centre, and Acton, Greenford and Hanwell District Centres through 'health check' assessments.
- Section 7 discusses the telephone survey, shopping patterns, trade retention and leakage and sets out the quantitative 'need' for additional convenience and comparison goods retail floorspace in LB Ealing until 2037 (the Plan period).
- Section 8 draws the analysis together and sets out our conclusions and recommendations in respect of the current health and composition of the Borough's main town centres and the need and opportunities for further growth.

2. Policy Framework

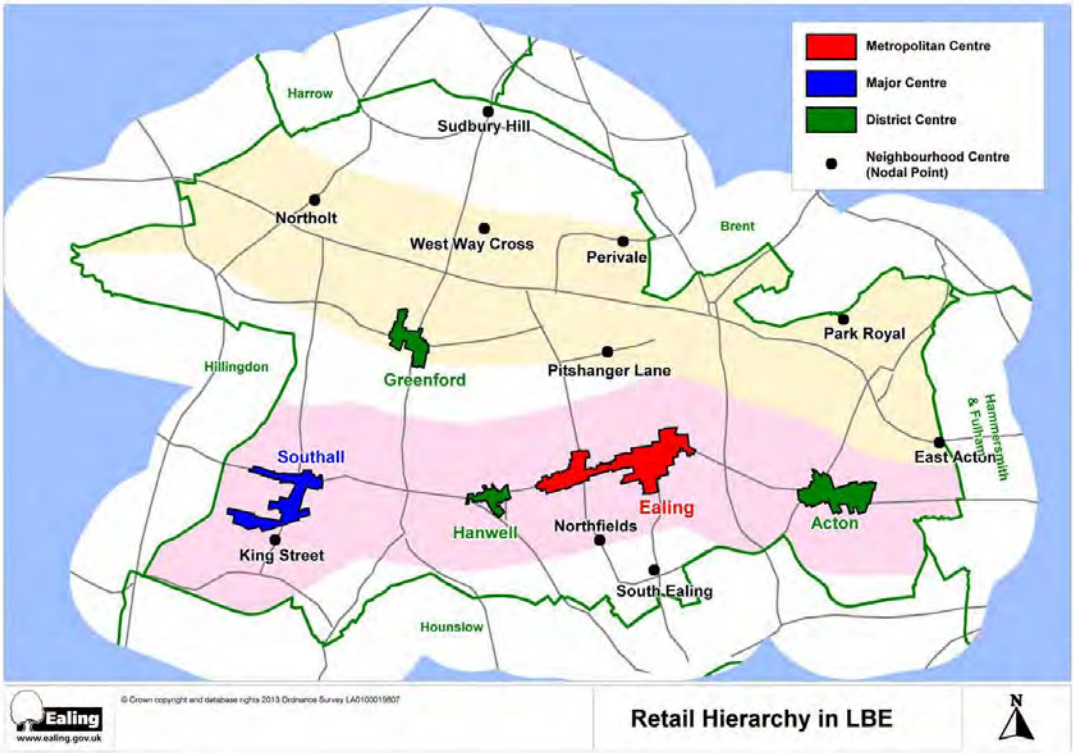
2.1 The Stage 1 Study (March 2017) summarises the key features of national and local planning policy specific to Ealing Metropolitan Centre. This section completes the policy analysis through a focused review of local planning policies relevant to retailing and town centres across the remainder of the borough.

Development Strategy 2026 (April 2012)

2.2 The Development Strategy 2026 is part of a portfolio of development plans that make up the Council's Local Plan. Setting out Ealing Council's vision and policies for the future development of the borough, the document conforms generally with the London Plan.

2.3 Chapter 1 sets out the spatial vision for Ealing up to 2026, and seeks to ensure the continuing vitality and viability of the borough's town centres in accordance with the established shopping hierarchy (Policy 1.1(d) (Figure 2.1). The policy sets out that by 2026, the Council aim to provide 14,000 additional homes, 94,500 sqm of new office floorspace, decrease the net stock of industrial floorspace by 57,000 sqm and provide up to 128,400 gross sqm of new retail floorspace.

Figure 2.1: Retail Hierarchy and Development Corridors in London Borough of Ealing



2.4 Development of these new homes, business and retail space will be primarily concentrated in:

- The Uxbridge Road / Crossrail corridor - particularly focused in Acton, Ealing and Southall town centres; around key stations at Acton Main Line, Ealing Broadway and Southall; and, municipal housing estates including Copley Close, Green Man Lane, Havelock and South Acton.
- The A40 / Park Royal corridor – particularly focused in Greenford town centre; Acton Main Line, Greenford and North Acton stations; Park Royal; and, other industrial estates.

2.5 The Development Plan highlights that the hierarchy of town centres is set out in the London Plan and include Ealing (a Metropolitan Centre), Southall (a Major Centre) and Acton, Greenford and Hanwell (District Centres). To ensure the future viability and vitality of the centres the boundary of the Southall town centre has been reconfigured to include the major retail development on Southall Gas Works site whilst at the same time excluding the area south of The Green. King Street has also been re-branded as a neighbourhood shopping centre serving Southall Green, and it is also proposed that designated shopping frontages in Hanwell are consolidated, while improving the quality of all frontages in the town centre.

2.6 Policy 1.2 (c) states that the Council will seek to maintain and increase the supply of retail floorspace across the borough to meet identified demand and to sustain the vitality and viability of the retail hierarchy. The policy encourages up to 98,500 sq m of comparison floorspace and 29,900 sq m convenience floorspace over the Plan period (borough-wide). The policy clarifies that this is to be delivered through the area based policies for Ealing Metropolitan Centre, Acton, Hanwell, Southall and Greenford, and that the delivery of and demand for retail floorspace will be reviewed through the Annual Monitoring Report and updated retail needs study respectively.

Uxbridge Road / Crossrail Corridor

2.7 The Uxbridge Road (A4020) is one of West London's major roads, passing through four town centres in the borough (Acton, Ealing, Hanwell and Southall) as well as large residential districts. It is well served with bus routes and provides several transport connections for commuters with London Underground and rail stations situated either on it or within walking distance.

2.8 The main intercity railway line which traverses the borough, runs parallel to the Uxbridge Road in central Ealing (Ealing Broadway station is effectively adjacent to the Uxbridge Road), and runs north-eastward through Acton to Paddington, and south-westward through Southall to Slough, Heathrow, Reading, the West of England and South Wales. This line currently provides direct and fast services, and is to be upgraded to provide Crossrail services from Heathrow to the West End and the City of London.

2.9 Crossrail will be a substantial addition to Ealing's transport infrastructure. It will not only underpin physical, economic and social change in this corridor but will fundamentally alter the overall demand for new development and its spatial distribution at each of the five proposed Crossrail stations in Ealing – Acton, Ealing Broadway, West Ealing, Hanwell and Southall. The greatest development potential within the corridor is identified to be in Ealing and Southall. The policy framework and character of Ealing Metropolitan Centre are analysed in the Stage 1 study.

Uxbridge Road / Crossrail Corridor: Acton District Centre

2.10 The Acton Neighbourhood Profile (Appendix 2) notes that Acton town centre sits astride the Uxbridge Road. It has excellent bus services, but the tube station at Acton Town and the Overground station at Acton Central, are both on the edges of the centre. The town centre is well-used, and has a 'district centre' role, but the profile recognises that it lacks a coherent identity and has limited retail provision for the district it serves. The Westfield shopping centre at Shepherds Bush has inevitably drawn some of the local shoppers away from Acton town centre, and whilst some redevelopment has taken place in Acton town centre, a number of sites offer opportunities for mixed-use development, and many of the public buildings are in need of an upgrade.

2.11 In the future, Acton is identified as being a major focus for growth, and the regeneration effort will be concentrated on three main places:

- Acton town centre - to regenerate the town centre and maintain and enhance its position as a district shopping centre.

- South Acton – to create a new mixed tenure neighbourhood and to integrate the area with the town centre.
- Acton Main Line – to create a mixed-use regeneration of the area south of a newly refurbished Crossrail station. In addition, improved transport capacity, better interchange facilities and improved access routes to the Acton Main Line station will be actively promoted.

2.12 Acton mainline station will benefit from major improvements as part of the plans to introduce the Elizabeth Line, including a new, spacious ticket hall, new footbridge with lifts, platform extensions, and new lighting/signage/CCTV and information screens. Planned works will deliver the station upgrades at Acton Main Line by December 2019.

2.13 Policy 2.2 aims to revitalise Acton Town Centre, including the development of up to 10-12,000 sq m gross of retail floorspace, additional food and drink outlets, a new swimming pool and improved cultural and community facilities at prime sites, including Morrisons, The Oaks, Beechworth House and the Town Hall site. The policy also aims to improve the public domain, including the market square at The Mount, King Street, High Street and Churchfield Road

Uxbridge Road / Crossrail Corridor: Hanwell District Centre

2.14 The Neighbourhood Profile for Hanwell (Appendix 2 Development Strategy) notes that it is the smallest of the district shopping centres in Ealing, but is well used by local residents. Hanwell's residential neighbourhoods are mostly well-established terraces, with private gardens and small public parks and green spaces adding to the distinctive character and attractiveness of the area. Although it is therefore less self-contained than the other centres, the Development Strategy recognises that there is a strong community feel to the area. The character of Hanwell is strongly influenced by green space, with the Brent River Park forming a substantial part of the neighbourhood.

2.15 In planning for the future, the Development Strategy confirms that Hanwell will not be a major focus for growth and investment in the borough. Its status as a district shopping centre will be maintained and there are plans to enhance and consolidate the town centre. Infrastructure proposals include several expanded primary schools, road safety improvements and Crossrail station. The Development Strategy notes plans to refurbish the Grade II Hanwell Community Centre to provide a range of community services, activities and letting opportunities. There is identified potential for a gross increase in retail floorspace of between 3,300 to 5,600 sq m.

2.16 Policy 2.7 aims to enhance and consolidate Hanwell Town Centre, informed by an extensive consultation process, which identified a number of priorities for the town centre regeneration programme. These included the need to improve the retail offer in Hanwell, improvements to local green spaces, improved car parking provision, maintaining the distinct character of the town centre, improvements to the street scene and to develop a vision for Hanwell. The policies will be complemented by improved public transport with the arrival of Crossrail. Policy 2.7 includes the following aspirations:

- To enhance and consolidate Hanwell Town Centre leading to the provision of 109 additional mixed tenure homes.
- To enhance all heritage assets that contribute to the character and appearance of the town centre.
- To promote development of up to 3,300-5,600 gross sqm retail to meet the retail needs of the Hanwell area and to consolidate designated shopping frontages in the town centre.
- To make station improvements, including opening southern access for easier pedestrian access to The Broadway and to enable Crossrail, provide improved facilities for cyclists, better bus links to key destinations such as Ealing Hospital and seek improvements in accessibility.

- To promote improvements in the street scene, to local green space and to private forecourts and parking provision.

Uxbridge Road / Crossrail Corridor: Southall Major Centre

2.17 The Development Strategy Neighbourhood Profile of Southall Major Centre (Appendix 2), recognises that is the most ethnically diverse area in the borough. Southall is famous for its Asian culture and has the largest Asian shopping centre in the capital. Southall continues to be home to new communities – with more recent migrants from Somalia, the Middle East and Europe. The area is characterised by a relatively youthful population, lower rates of economic activity, higher levels of overcrowded households and parts of the neighbourhood have high relative levels of multiple deprivation. There is a particular shortage of open space in much of the area, particularly in Southall West, Southall Green and Southall Town Centre.

2.18 In planning for the future, the Development Strategy highlights that Southall has been identified by the Mayor of London as an Opportunity Area with an overall indicative employment capacity of 2,000 jobs and a target of 4,000 new homes. Southall will therefore be a major focus for growth and the regeneration effort will be concentrated in two main places:

1. Southall town centre – to regenerate the town centre and build upon "A Framework for Southall" published in 2008 and the "Southall Development Study" published in 2010. The catalyst for development is the creation of a new mixed-use community on the site of the former Southall Gas Works that will include a high quality mainstream retail offer. It will build on the success of the unique Asian specialism centred on the Broadway/South Road and lead to an intensifying of development around the newly constructed Crossrail station at Southall station. Southall town centre will be reconfigured and maintained as a major shopping centre whilst King Street will be re-branded as a neighbourhood shopping centre.

2. Havelock area - The redevelopment of the estate presents a significant – although complex - opportunity for the redevelopment of Southall and could act as a catalyst for the development of the surrounding multiple land opportunities, including the under-used industrial land.

2.19 The Development strategy outlines a potential net increase in residential units of 4,200 (34%), and a potential gross increase in retail floorspace of between 24,000 to 32,000 sq m; but no increase in office jobs.

2.20 Policy 2.8 aims to revitalise Southall Town Centre through a number of aspirations, with those relevant to this study including:

- To regenerate Southall Town Centre leading to the provision of up to 3,320 additional mixed tenure homes.
- To re-configure the boundaries of Southall Town Centre to incorporate the major retail development on Southall Gas Works site whilst at the same time excluding the area south of The Green. The centre will provide a high quality mainstream retail offer to complement the Asian offer elsewhere within the centre including the development of up to 24-32,000 sqm of gross retail floor space, provision of town centre parking on the Southall Gas Works site and a package of bus improvement measures so that visitors can visit other parts of the centre. King Street has been re-branded as a neighbourhood shopping centre serving Southall Green.
- To promote The Broadway, South Road and The Green as an 'Asian Gateway' with a strong cultural offer for banqueting, conferencing, festivals and performing arts, along with Asian retailing and restaurants.

- To modify Southall station to cater for Crossrail services to provide increased capacity, improved facilities, enhanced station integration and interchange, to widen the South Road bridge to facilitate bus movement and a high quality pedestrian environment and to permit high densities appropriate for development in the vicinity subject to improvement of physical infrastructure in the station area.
- To provide additional community facilities – including a new community hub comprising a library and health centre, extended schools facilities and a new two or three form entry primary school with community access.
- To build up to 2,620 new homes on the Southall Gas Works site by 2026 (out of a planned total of 3,750) with a balance of market, affordable housing and family housing with bigger unit sizes to reflect household characteristics in Southall and the borough's housing needs, to provide a range of supporting physical, social and green infrastructure and to implement a Low Emission Strategy.
- To cater for and enhance Southall's heritage assets through proposals such as the refurbishment of the Manor House, Southall Town Hall and the Himalaya cinema to accommodate a range of retail and community uses whilst establishing linkages to wider regeneration proposals affecting the town centre.

2.21 The supporting text notes that these proposals mark major changes for Southall Town Centre – taking advantage of the redevelopment of the station as a Crossrail station and the opportunities provided by the development of the Southall Gas Works site to the west of the existing centre. The Mayor of London has identified Southall as an Opportunity Area in the London Plan and has worked with Ealing Council to produce the Opportunity Area Planning Framework (OAPF) for the area. This site is within close proximity to the improved town centre.

A40 Corridor

2.22 The landmarks along the A40 indicate the mix of uses that make the Corridor distinctive. These vary from industrial heritage buildings like the Aladdin Tower and the Hoover Building, to the woods of Horsenden Hill, Northolt Church, and the newer Northala Fields landscaped mounds. The A40 and Central Line gave rise to extensive twentieth century industrial and residential development, and there are now problems of ageing industrial stock, peripheral housing estates, and traffic congestion.

2.23 In the north-east of the borough is Park Royal, Europe's largest industrial business park, and Royale Leisure Park cluster – both now under the jurisdiction of the Old Oak and Park Royal Development Corporation (OPDC). It covers 650 acres and is well related both to Central London and to Heathrow Airport. Park Royal sustains a substantial proportion of London's industry and commerce, and businesses based here provide important linkages which support a range of other employment locations across the borough. The A40 Corridor straddles the A40 and the Grand Union Canal, and reaches north to the Central Line and south to the Ruislip Road. It includes the Park Royal Industrial Estate and Greenford town centre.

A40 Corridor: Greenford District Centre

2.24 The Development Strategy Neighbourhood Profile notes that whilst Greenford is largely suburban and residential in character it also has a considerable commercial presence including the Greenford Industrial Estate and Greenford Green (around Butler's Wharf and the former GSK site). Greenford town centre is a district shopping centre and therefore is the main centre in the north-west part of the borough, mainly serving residents of Greenford, Northolt and parts of Perivale and north Southall. Being located in a different 'corridor' to the other Ealing centres, Greenford is not located on the Elizabeth Line, and unlike the other centres, there is no new Crossrail Station.

2.25 In planning for the future, Greenford is identified as a focus for growth although the overall quantum of development is expected to be considerably smaller than Acton, Ealing, Park Royal or Southall. Regeneration will be concentrated on four main places:

- Greenford town centre – to maintain and enhance its position as a district shopping centre.
- Greenford Station and Westway Cross – to promote a high-density development at the station and land to the north.
- Greenford Green – to promote mixed-use regeneration on key sites.
- Greenford Depot – to develop the site and ensure optimal use of the existing waste management facility.

2.26 The Development Strategy quantifies a potential net increase in residential units of 470 (4%), a potential net increase in office jobs of 1,000; and a potential gross increase in retail floorspace of between 7-8,000 sq m.

2.27 Policy 3.5 focuses on enhancing and consolidating Greenford Town Centre, primarily to promote the development of schemes that will create an attractive and safe town centre environment, help relieve congestion and improve bus operation and facilities, and provide up to 7-8,000 gross sq m of additional retail development and 45 additional mixed tenure homes. The policy aims to deliver a vibrant and sustainable town centre, an improved retail offer, improved public transport facilities and modal shift away from the car to reduce traffic congestion and delays.

2.28 Policy 3.6 focuses on Greenford Station and Westway Cross, identifying and promoting the potential for high-density development at Greenford Station and land to the north. This is some distance from the heart of the district centre shopping area, with no opportunity for seamless integration. The policy confirms that any scheme should provide for a mixed-use development including offices, housing, leisure, community and improved transport interchange facilities. The policy aims to ensure that good public transport, cycling and pedestrian links are established to and from the regeneration area to the north and to Westway Cross shopping centre, as well as south to Greenford Town Centre.

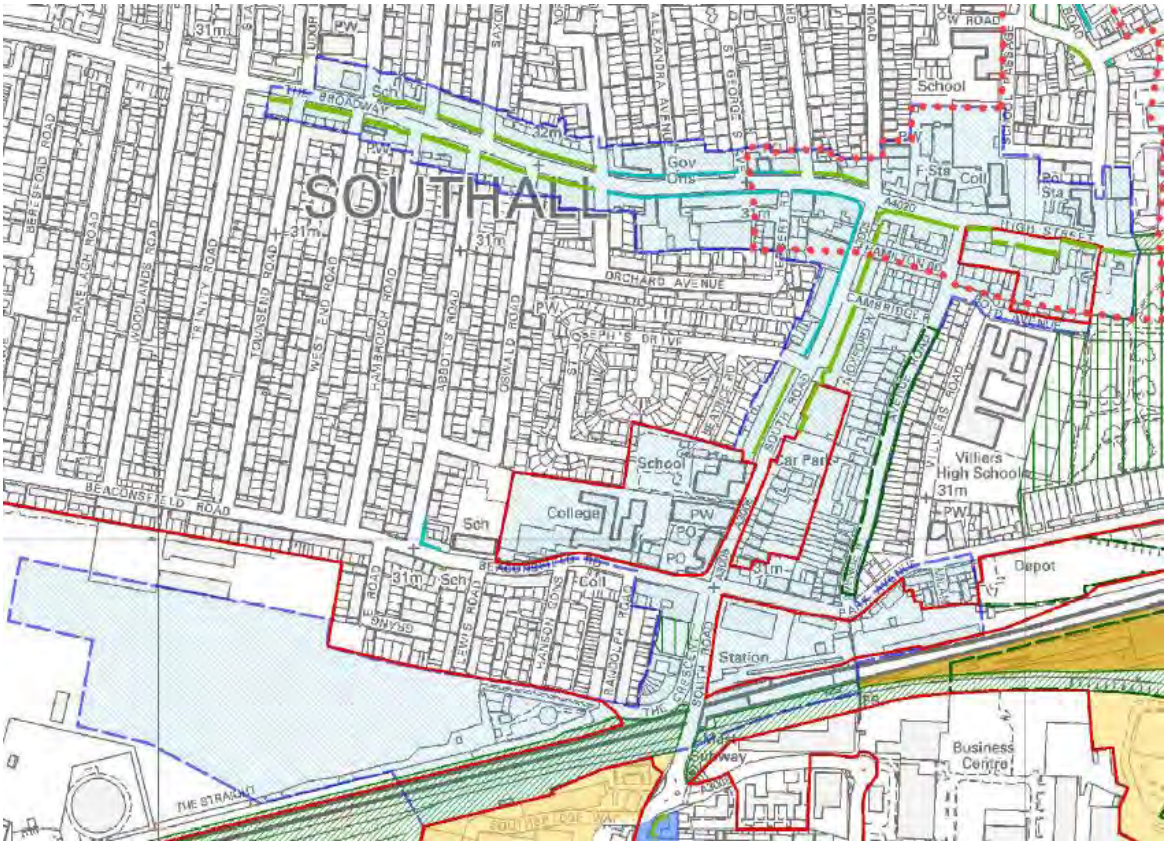
2.29 Through exploiting the opportunity for improved public transport links to the out-of-centre Westway Cross neighbourhood shopping centre, Policy 3.6 aims to enable these facilities to serve their neighbourhood in Greenford's existing residential areas, and to serve new residential and business development in the vicinity. To help guide and inform the development of the area over the plan period the council intends to produce a separate supplementary planning document.

Adopted Policies Map (2013)

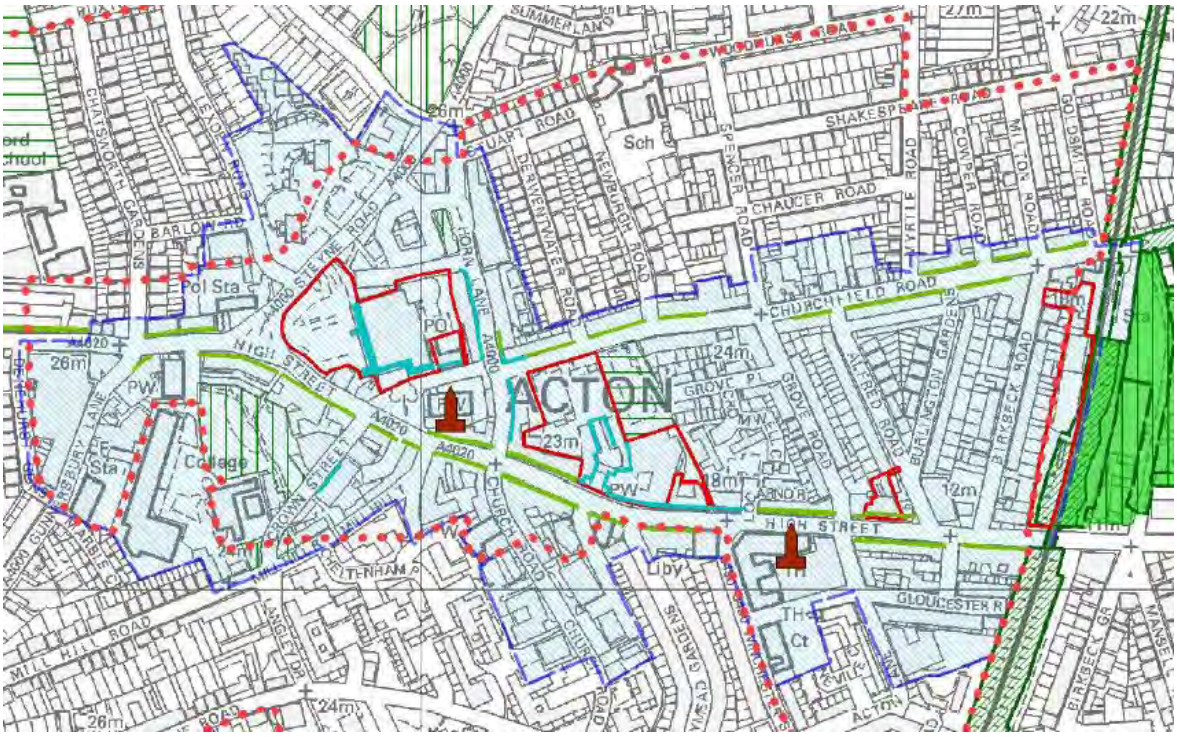
2.30 LB Ealing's Adopted Policies Map illustrates the boundary of Southall Major Centre, and Acton, Hanwell and Greenford District Centre, as show in Figure 2.1, 2.2, 2.3 and 2.4. The maps identify primary and secondary shopping frontages in each of the four town centres.

2.31 The Policy Map Key relevant to retail and town centres is identified as follows:

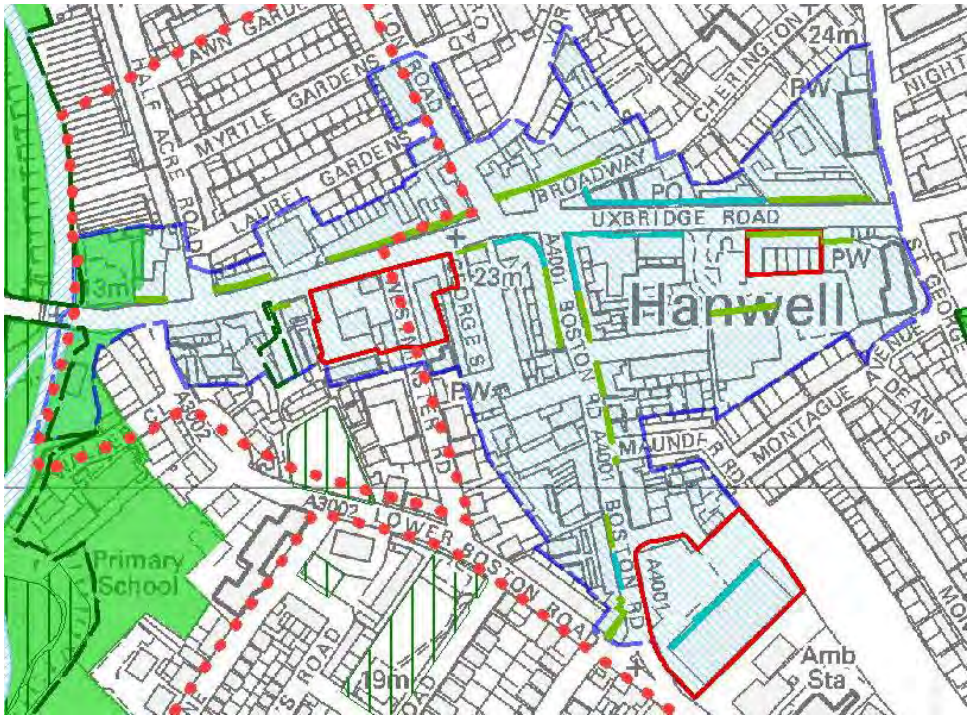
Southall Major Centre Policy Allocations



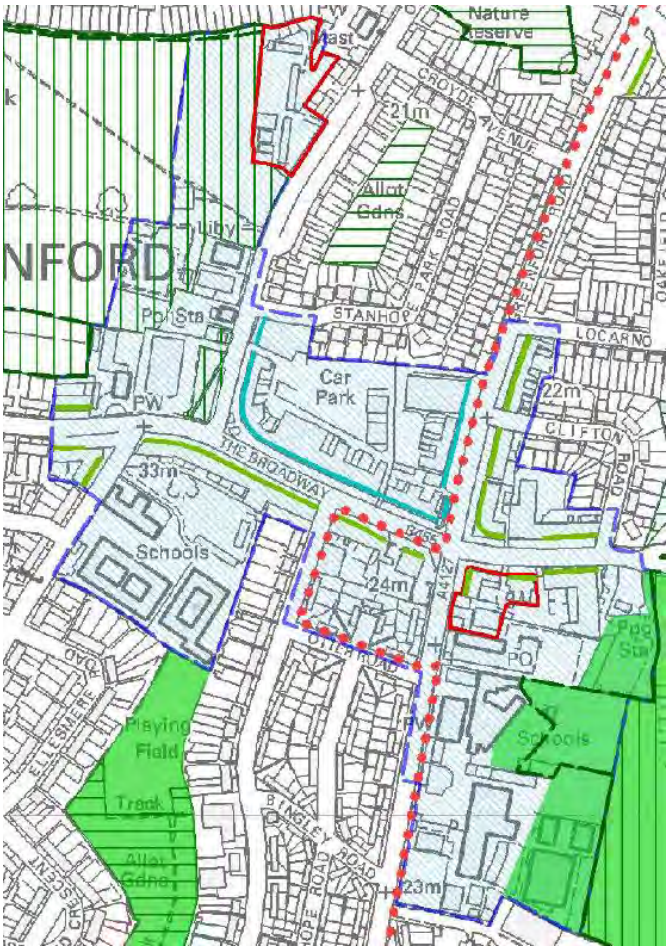
Acton District Centre Policy Allocations



Hanwell District Centre Policy Allocations



Greenford District Centre Policy Allocations

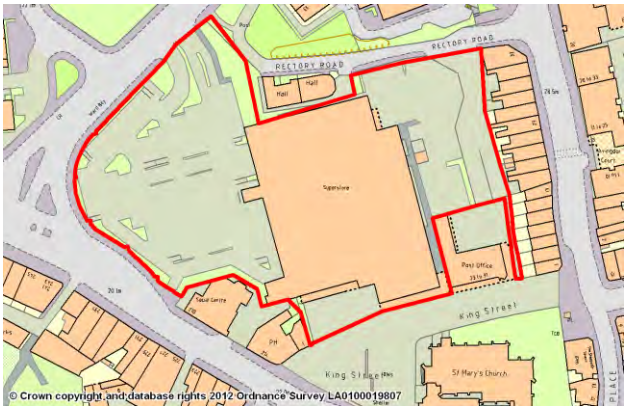


Development Sites DPD (December 2013)

2.32 The Development Sites DPD complements the Development Strategy 2026 through allocating land for a particular use or type of development. These development sites are considered central to delivering the policies and objectives of the Development Strategy, and seen as deliverable within the lifetime of the Local Plan. A number of sites are allocated in Acton, Greenford, Hanwell and Southall town centres, and provide a brief overview of each below. Site plans are provided, which can also be identified on the town centre plans illustrated above.

ACT2 Acton Gateway, Acton

2.33 The 1.30ha site is owned and occupied by Morrisons, and allocated for mixed use development including retail and residential. The site occupies a pivotal location at the entrance to the town centre, and the allocation highlights the significant scope to make more efficient use of the site with an improved layout and high quality design. The idea is to introduce residential on the upper floors and contribute to a more coherent street scene better integrated with existing shop frontages and shopping streets.



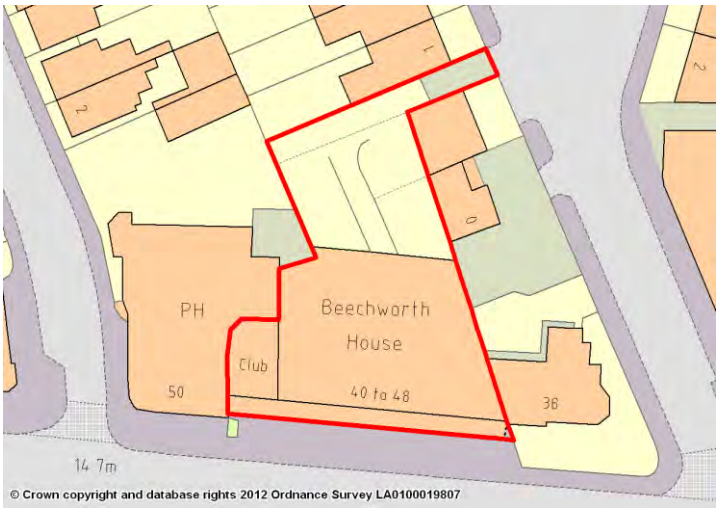
ACT3 Oaks Shopping Centre and Churchfield Road Car Park, Acton

2.34 The site has an area of 1.2ha and is allocated for mixed use development appropriate to the town centre, including additional retail, commercial and residential floorspace. The site was allocated in the context that it offers the opportunity to enhance the town centre through significant improvements to the way in which the site relates to the surrounding area. It has the ability to add a greater intensity and variety of uses that contribute to the vitality of the town centre.

2.35 The redevelopment of the site is currently under construction and is discussed further in the final section of this report as part of our conclusions and recommendations for each of the borough town centres.

ACT4 Beechworth House, Acton

2.36 Beechworth House is a derelict four storey building, previously comprising retail at ground floor. It is located on High Street, set back from the main building line and having access to the rear of the site from Alfred Road. The existing building has been largely vacant for some time and in its current state of repair has a detrimental impact on the Conservation Area. The site offers an opportunity to significantly enhance the townscape while contributing to the vitality and viability of the town centre by returning the site to full use.



GRE2 Greenford Crossroads, Greenford

2.37 The 0.3ha site is located on the south-eastern corner of Greenford's main crossroads, and benefits from substantial pavement widths and mature tree planting on both frontages. Current uses include retail, offices, residential and a car showroom. The DPD confirms that the site presents an opportunity to enhance the street scene and animate the generous public realm surrounding the site.

2.38 It is allocated for mixed use development appropriate to the town centre including retail, office and residential, with justification stating that consolidation and enhancement of existing uses will provide for an improved retail and business offer supported by complementary uses that contribute to the vitality of the town centre and an enhanced street scene.

HAN1 64-88 Uxbridge Road, Hanwell

2.39 The privately-owned site contains a terrace of two storey retail units with first floor setback and long backyards fronting Uxbridge Road, bordered by three storey Gold's Gym and hard landscaped town square to either end, and surface level car park to rear. The existing building is in a poor state of repair and presents a weak and unattractive building frontage to the busy Uxbridge Road.

2.40 The site is allocated for mixed use development appropriate to the town centre, including provision for community uses. Redevelopment is recognised as presenting an opportunity to enhance the street scene of this section of Uxbridge Road and activate the adjacent public square.

HAN3 Wickes, Hanwell

2.41 The 0.84ha site is currently occupied by Wickes and associated surface level car park, and is located on Boston Road to the south of the town centre. The Development Sites DPD confirms that the current use as a standalone retail warehouse and surface level car park underutilises a key town centre site, and there is scope to intensify and diversify retail uses to improve the retail offer of the town centre complemented by the introduction of residential use to the site to support the vitality and viability of Hanwell.

SOU1 Southall Market

2.42 The privately owned, 1.5ha site is located on the eastern edge of the town centre, bordering Southall Park. It includes the Grade II Listed Red Lion Pub, the Lidl supermarket set back from the road, several small shop units fronting the High Street, and three residential properties fronting Boyd Avenue. While the pub is in generally good condition, the car park to the rear and poor quality adjacent buildings provide a poor setting for one of only two listed buildings in the town centre.

2.43 The site is allocated for mixed use development appropriate to the town centre, including retention and refurbishment of listed building and provision of a street market. The objective is to intensify and realise the full potential of the town centre site, reflecting its accessible location, function as a gateway to Southall Town Centre, and proximity to the open spaces of Southall Park.

SOU2 Iceland, Quality Foods and 63-95 South Road, Southall

2.44 The 1.23ha site is located to the south of the town centre on South Road, opposite the former sorting office development site. The site occupies a key location in the route from Southall Station to the specialist shopping area concentrated around The Broadway, and is currently occupied by two supermarkets – including Iceland – , surface level car park, and some small commercial units.

2.45 The scope to intensity uses on the site is recognised, including the introduction of new uses to alleviate the pressure on the specialist independent retailers uniquely concentrated along The Broadway and to help meet the identified retail growth required to support Southall as a viable Major Centre, serving the needs of its residents as well as the wider catchment. The site is allocated for mixed use development, including provision of a range of retail/commercial unit sizes appropriate to a variety of occupier requirements.

SOU3 Beaconsfield Road / South Road, Southall

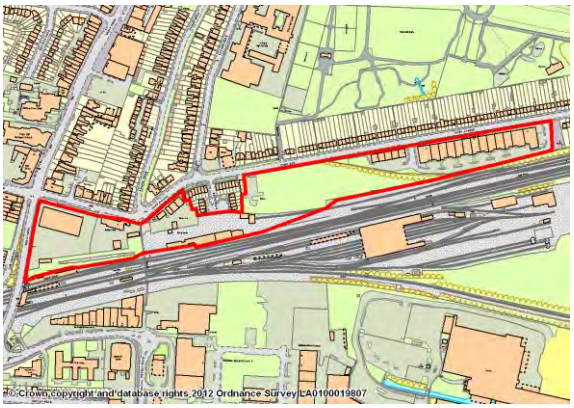
2.46 The former Royal Mail Sorting Office is located on the corner of Beaconsfield Road and South Road, closely bounded by the King's Hall Methodist Church and Hambrough Primary/Nursery School to the north; and Southall & West London College to the west. Together these buildings form a tightly grained complex of predominantly community/education uses in a prominent and highly accessible location on South Road close to Southall Station.

2.47 The 3.23 ha site is recognised as offering significant potential to contribute to enhanced educational provision with the capacity for consolidated education and community uses, supported by the introduction of new town centre uses on the site of the recently vacated Royal Mail sorting office. While the Church wishes to remain on the site, the King's Hall building is underutilised and dilapidated at present and requires major investment to bring it back into full use. The site is allocated for continued education and community use, with introduction of complementary mixed use development appropriate to the town centre including A1/A2/A3, flexible business space and residential.

SOU4 Southall Crossrail Station, Southall

2.48 Southall Station is characterised by poor environmental quality with an inefficient rail/bus interchange, and lack of integration with the town centre. Despite being the most well-used community facility in the area, the Gurdwara Sri Guru Singh Saba is housed in a single storey industrial-style shed that does not reflect its purpose or importance to Southall.

2.49 In conjunction with Crossrail, the Development Sites DPD confirms that Southall Mainline Station will be completely rebuilt to the north of the railway line with associated public realm improvements. These changes support the provision of additional development above and around the station, and provides an opportunity to deliver a comprehensive mixed-used development which includes the Gurdwara Sri Guru Singh Saba, as well as additional retail, commercial, community, employment and residential uses.



2.50 SOU4 falls within the Southall Gateway – a key identified redevelopment opportunity. The Southall Gateway SPD was subsequently adopted in June 2015 in order to secure delivery of this site in a comprehensive and coherent way. Southall Gateway occupies a prominent location at Southall Station, connecting this key transport node to both Southall Green and Southall Broadway, and forming the functional and geographical centre of the area as well as comprising its main public transport hub.

2.51 Redevelopment of Southall Station for Crossrail is playing a critical role in defining Southall, supporting the creation of a gateway focused around the transport hub and introducing high density high quality mixed use development. The overall aspiration is the replacement and relocation of the Gurdwara – a key cultural and community asset, the creation of a continuous high street connecting Southall Gateway with Southall Broadway and The Green, and the 'stitching' of Southall together with an arrival/interchange facility at Southall station.

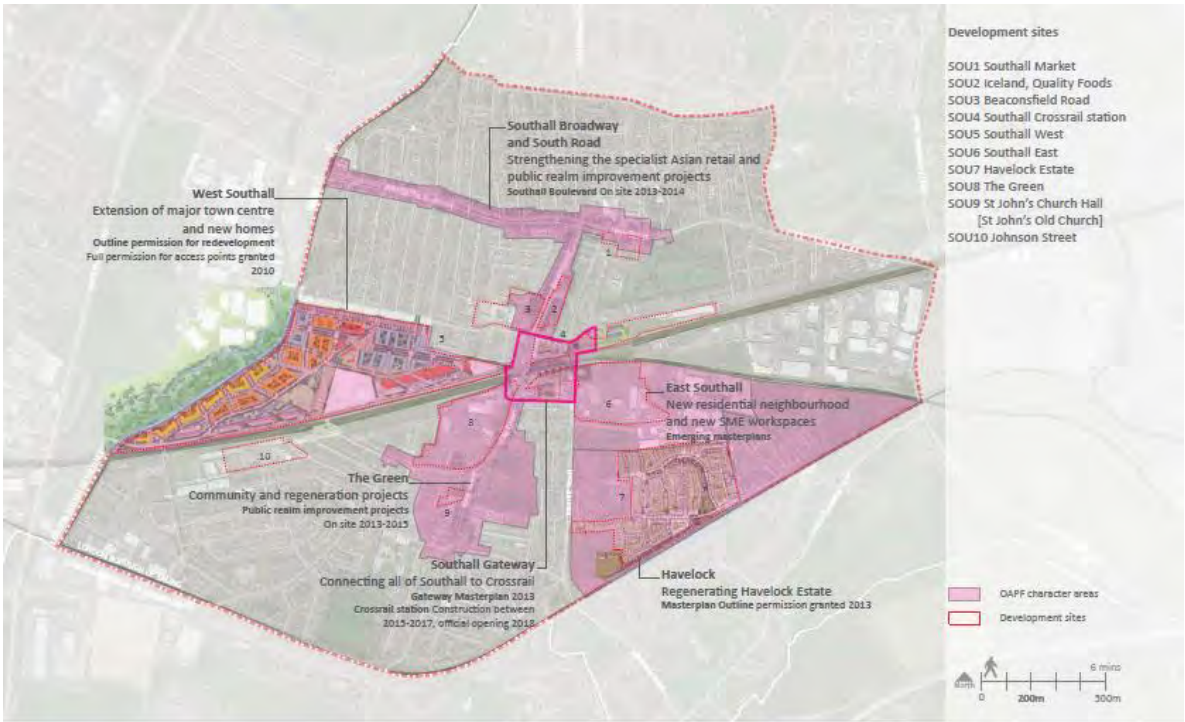
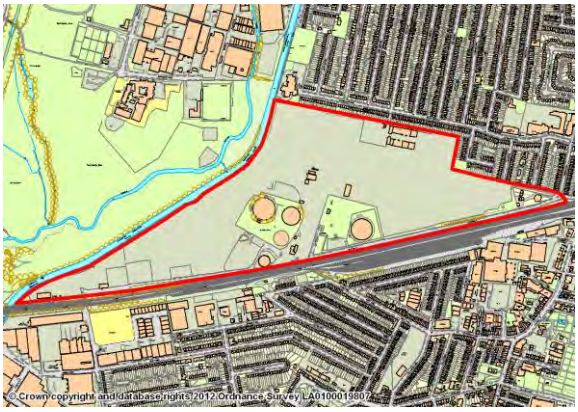


Fig 1 Southall Opportunity Area and Southall Gateway

SOU5 Southall West, Southall

2.52 This large 37ha strategic site is owned by National Grid. Formerly occupied by the gas works, the site is currently used as long stay car parking for Heathrow Airport. The triangular site is bordered by the railway line to the south, the Grand Union Canal to the west and established residential neighbourhoods to the north. The narrow eastern edge of the site extends to South Road opposite Southall Station.

2.53 The site is allocated for residential-led mixed use development including retail, office, community, health, education, hotel, leisure, sports and public open space; and the principal of such mixed-use development has been established through the recent planning permission. Redevelopment is intended to support the long-term regeneration of Southall through bringing back into use a large parcel of contaminated land to provide a range of new homes and community facilities, and deliver major infrastructure improvements including widening of the South Road bridge.



SOU8 The Green, Southall

2.54 This 8.3ha site, largely privately owned, forms the interface between Southall Station and the heart of King Street neighbourhood centre. Lying outside, but adjacent to the southern boundary of Southall Major Centre, it is identified as containing a varied, and in places incompatible, mix of uses. Current uses include light industrial, warehousing and storage units, surface level car park, retail, some commercial and residential, and the Dominion Arts Centre. There are several other community uses on the site, including community centres, places of worship and an elderly day care centre.

2.55 The site is allocated for mixed use development appropriate to the town centre, with continued protection of existing industrial uses on the Featherstone, Dominion and Suterwalla estates as a Local Significant Industrial Site (LSIS) and retention of the Dominion Arts Centre. Justification for redevelopment points to the site containing a wide variety of comparatively low density uses and an underused surface level car park. Consolidation and intensification of the site will allow retention of the locally important industrial uses and support the introduction of new uses to support the vitality and viability of the neighbourhood centre.

2.56 SOU8 falls within the wider 'Southall Green' character area, and within the remit of the Draft Southall Green SPD, November 2016. The more up-to-date document sets out the known constraints and context of SOU8 and establishes design principles that are central to realising its full potential.

2.57 The Green as a whole (see map below) is a key character area within central Southall, located south west of the station. The SPD notes that it comprises two main parts, the bulk of the centre which is fine grained and well integrated with its surroundings, and relatively large north western block (SOU8) currently suffers from incoherent street layout and a fragmented urban form. The vision for SOU8 is the introduction of residential and mixed-use intensification related to the high street, and the

emerging hub around the new Crossrail Station; SOU8 is close to the epicentre of change within Southall.

2.58 Masterplanning indicates opportunity for development of an average of 7 storeys, and it is emphasised that development must reintegrate this area with central Southall and optimise the use of land for residential and other compatible town centre uses. Indicative capacities include 1,500 new homes and 1,500 sq m of retail floorspace; but it is recognised that whilst development will be phased it should be form part of a comprehensive masterplan and not be 'ad hoc' and/or 'piecemeal'. It is included that proposals should provide for a range of town centre uses at street level on the high street network.

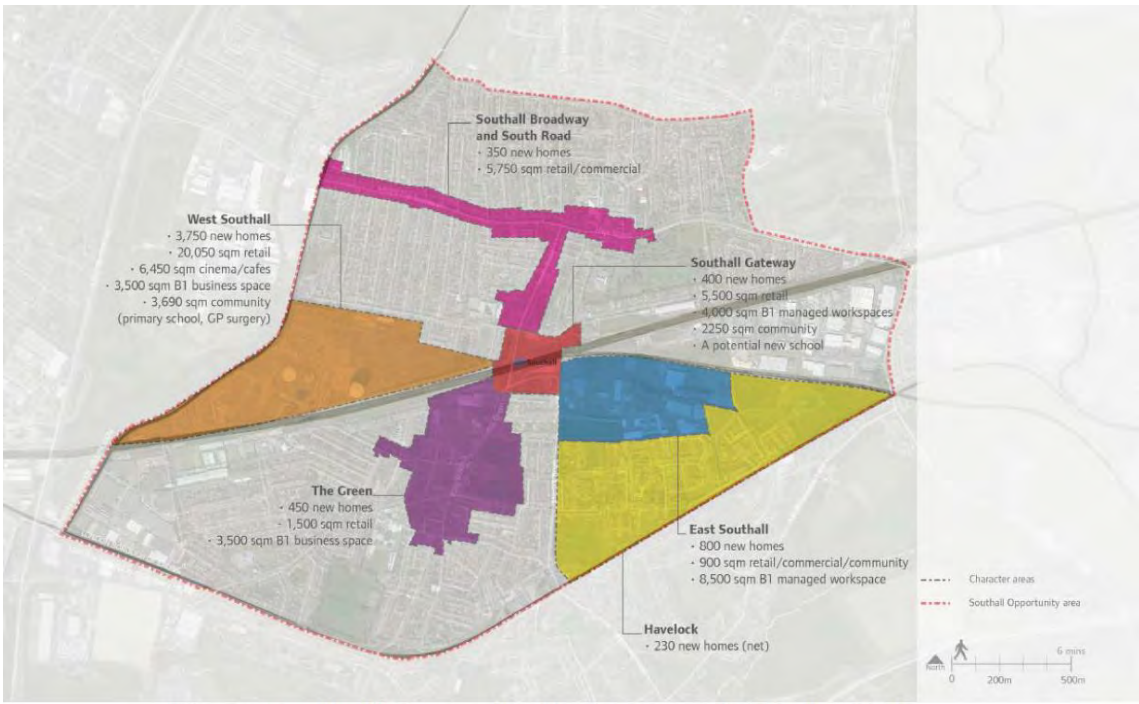


Fig 1 Southall Opportunity Area and Southall Green

Development Management DPD (December 2013)

2.59 The Development Management DPD (DM DPD) forms part of the wider Local Plan and should be read alongside the Development Strategy 2026 and the Development Sites DPD, both discussed above. Within this framework, the role of the DM DPD is to set out the criteria by which planning applications are assessed.

2.60 DPD Policy 4B protects and sets thresholds for retail uses in the designated Primary and Secondary retail shopping frontages. Primary Frontages at street level must comprise 100% A1 uses, and in Secondary Frontages at street level no less than 40% of retail uses should be in A1 use. Other uses in Secondary Frontages must complement the function of the retail area. Further to this, the policy states that development in a designated retail frontage should not result in a net loss of active frontage and should increase the active frontage where appropriate.

2.61 DPD Policy 4C states that in determining planning applications, main town centre uses must relate well to their surroundings and a high quality design façade is particularly important. Development must not result in over-concentration of a particular use type where this use may erode local amenity by nature of that concentration.

2.62 Such use types are defined to include hot food takeaways (A5), amusement arcades and night time uses. In terms of A5 uses these are not permitted within 400m radius of an existing school and each new unit must be separated from a unit of the same use type by at least two units of other uses. Furthermore, night time uses will also be given careful consideration, particularly in respect of neighbouring uses especially residential. In determining planning decisions, the local planning authority will have particular concern for the cumulative and saturation effects of these uses.

Summary

- Policy allocates Southall as a Major Centre, and Acton, Greenford and Hanwell as District Centres. The Uxbridge Road/Crossrail Corridor passes through four town centres in the borough (Acton, Ealing, Hanwell and Southall), and each will benefit from new Crossrail Stations, including both Ealing Broadway and West Ealing. Crossrail will drive demand for new development, with the greatest investment potential identified to be in Ealing and Southall.
- The policy aspiration for Acton is to regenerate the town centre and maintain and enhance its position as a district shopping centre. The policy framework identifies quantitative need for up to 10-12,000 sq m gross of retail floorspace additional food and drink outlets, a new swimming pool and improved cultural and community facilities at prime sites, including Morrisons, The Oaks, Beechworth House and the Town Hall site. The policy also aims to improve the public domain, including the market square at The Mount, King Street, High Street and Churchfield Road.
- The policy framework confirms that Hanwell will not be a major focus for growth and investment in the borough. Its status as a district shopping centre will be maintained and there are plans to enhance and consolidate the town centre through a reduction in designated shopping frontages, and an improvement to the quality of all remaining frontages in the town centre. The policy framework identifies the potential for a gross increase in retail floorspace of between 3,300 to 5,600 sq m to meet the retail needs of the Hanwell area, and allocates the Wickes site and 64-88 Uxbridge Road as key development opportunities in the town centre.
- Southall Major Centre is the most ethnically diverse area in the borough, with a substantial opportunity for development, growth and regeneration. Southall has been identified by the Mayor of London as an Opportunity Area with an overall indicative employment capacity of 2,000 jobs and a target of 4,000 new homes, the catalyst being the creation of a new mixed-use community on the site of the former Southall Gas Works and newly constructed Crossrail Station. Southall town centre will be maintained as a Major Shopping Centre, with new high quality mainstream retail on the Gas Works, complementing the Asian offer elsewhere in the centre.
- Southall town centre boundary has been extended to include the Gas Works site. The Broadway, South Road and The Green will be promoted as an 'Asian Gateway' with a strong cultural offer for banqueting, conferencing, festivals and performing arts, along with Asian retailing and restaurants. Additional sites SOU1 and SOU2 are located in the existing shopping frontages, and are sufficient in scale to contribute strongly to the regeneration of these areas and consequent improvement to the vitality and viability of the town centre.
- Greenford is the only centre in the borough not located on the Uxbridge Road/Crossrail Corridor, and is therefore the only centre not benefitting from a new Crossrail Station. Greenford is, however, identified as a focus for growth although the overall quantum of development is expected to be considerably smaller than Acton, Ealing, Park Royal or Southall. The policy objective is to maintain and enhance its position as a district shopping centre and identifies Greenford Crossroads as the key town centre development opportunity site. Other aspirations aim to relieve congestion and improve bus operation and facilities.

3. Southall Major Centre

3.1 Southall is defined as a Major Centre in the London Plan, and comprises 448 retail units. Lying to the north of the railway line, the town centre comprises two key routes configured as a 'T' shape, extending along Uxbridge Road/The Broadway/High Street (east/west), and South Road (north/south) towards Southall train station. King Street lies to the south of the railway line and was previously included within Southall town centre boundary, but has since been re-designated as a separate Neighbourhood Centre.

3.2 Southall is the most ethnically diverse area in the borough and is well known as a vibrant multi-cultural centre. South Asians, predominantly Sikhs, began to settle in the area in the early 1950's, and today the centre is famous for its Asian culture and the largest Asian shopping centre in the capital. Southall continues to be home to new communities, with more recent migrants from Somalia, the Middle East and Europe.

3.3 The town centre features predominantly specialist Asian shops and a limited range of conventional comparison and convenience retail. The high street also contains a large number of religious, educational and civic institutions and a good range of small-scale professional services and businesses. This density and mix of uses along the high street creates a sense of vitality and activity central to Southall's character. The smaller King Street Neighbourhood Centre offers mainly convenience goods to serve the local area.

3.4 The area is characterised by a relatively youthful population, lower rates of economic activity, higher levels of overcrowded households and parts of the neighbourhood have high relative levels of multiple deprivation. There is a particular shortage of open space in much of the area, particularly in Southall West, Southall Green and Southall Town Centre.

3.5 As noted in Section 2, Southall has been identified by the Mayor of London as an Opportunity Area with an overall indicative employment capacity of 2,000 jobs and a target of 4,000 new homes. Southall is therefore a major focus for growth and regeneration, concentrated in two main places including Southall Town Centre and the Havelock Area. The catalyst for development is the creation of a new mixed-use community on the site of the former Southall Gas Works that will include a high-quality mainstream retail offer. The intention is to build on the success of the unique Asian specialism centred on the Broadway/South Road and lead to an intensifying of development around the newly constructed Crossrail station at Southall station.

3.6 To ensure future viability and vitality, the boundary of Southall town centre has been reconfigured to include the major retail development on Southall Gas Works site. Planning permission has been granted for 14,200 sq m gross of comparison goods, 5,850 sq m gross of convenience goods and 17,500 sq m gross of A3-A5 floorspace.

Diversity of Uses/Retailer Representation

3.7 Based on the latest survey undertaken by Experian Goad (December 2016), Southall town centre currently comprises 60,320 sq m gross retail, leisure and service floorspace across 448 units. Table 3.1 and 3.2 below set out the diversity of uses in Southall town centre compared to the national average in respect of town centre composition.

Table 3.1: Southall Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	72	16.1	8.7	7.4
Comparison	151	33.7	31.5	2.2
Leisure Service	84	18.9	23.7	-4.8
Retail Service	57	12.7	14.2	-1.5
Financial and Business Service	44	9.7	10.4	-0.7
Vacant	32	7.1	11.2	-4.1
Misc	8	1.8	0.1	1.7
Total	448	100	100	-

Source: Experian Goad

Table 3.2: Southall Composition of Uses (Floorspace)

	Floorspace sq m	% of Total	UK Average (%)	Variance
Convenience	16,220	26.8	15.3	11.5
Comparison	17,540	29.1	35.5	-6.4
Leisure Service	11,074	18.3	24.8	-6.5
Retail Service	4,673	7.8	6.9	0.9
Financial and Business Service	5,518	9.2	7.9	1.3
Vacant	4,227	7.0	9.5	-2.5
Misc	1,068	1.8	0.1	1.7
Total	60,320	100	100	-

Source: Experian Goad

3.8 The number of comparison goods units is marginally above the national average, but the level of floorspace occupied by comparison goods operators is substantially below the national average. This indicates a small unit size generally incompatible with the operational requirements of mainstream multiple retailers, but well suited to the current representation of predominantly independent retail operators. Within the 151 shop units, the mainstream comparison retail offer is largely limited to Poundland, Boots, Superdrug and Shoe Zone, with the remainder occupied by a predominantly Asian retail offer.

3.9 Experian provide a more detailed breakdown of the comparison goods category. This highlights the above average representation of clothing, footwear, jewellery/watches/silver, and textiles and soft furnishings, consistent with the large number of Asian clothing/footwear/accessory goods on offer in Southall town centre. Units vary in size from small corner shops to large purpose built units, and there are several shopping centres, arcades and bazaars. The Palace Shopping Centre on South Road is today a Grade II* listed shopping mall which has retained a number of original features.

3.10 Convenience goods provision in Southall town centre is particularly strong when compared to average levels across UK town centres. The number of units occupied by convenience goods operators is 7.4% above the national average, whilst the level of floorspace is 11.5% above the national average. This is a significant variation based on our experience studying town centres across London and the South East.

3.11 Of the 72 convenience goods units, only two are occupied by multiple retailers; Lidl is located at the eastern end of the centre on High Street, occupying a small unit of only 441 sq m net, and Iceland is located on South Road occupying a similar store size of just 504 sq m net. The remaining 70 units are occupied predominantly by smaller independent operators and markets selling Asian products including Halal meat, confectionery and biscuits, and fruit and vegetables. The number of units and level of floorspace occupied by small scale, independent convenience goods operators are substantial.

3.12 In contrast to the convenience goods sector, Southall town centre has a below average number of units occupied by retail services, leisure services and financial and business services. In the retail services category, there is a particularly low level of health and beauty salons and opticians, but a high proportion of photo studios and travel agents.

3.13 The leisure services category is equally limited, with a below average representation of bars/wine bars, cafes, cinemas, hotels, public houses, restaurants and sports facilities; but there is an above average provision of betting offices and fast food take-aways. Restaurants most frequently offer Indian/Asian cuisine, and there is one independent three screen cinema – The Himalaya Palace – showing both Bollywood and Hollywood films.

3.14 The financial and business category demonstrates a strong representation of banks, but a below average representation of estate agents, employment/career centres, financial services and building

societies. A number of banks are located adjacent to each other on The Broadway including Santander, HSBC, Barclays, Lloyds and Halifax. This is high footfall area, close to the junction with South Road.

Southall Market

3.15 Southall Market takes place on Saturday's (all day), Wednesday's (am) and Friday's (am) and sells a range of goods including fashion, fruit and veg, hot food, jewellery, household items and electric items. On Fridays, the market is more focused on new and second-hand furniture, household items, bric-a-brac and antiques. Located on High Street, the market is well attended and offers cheaper alternatives and a good selection of Asian jewellery and clothing, and food including fresh fish.

Vacant Units

3.16 The most recent Experian Goad survey (December 2016) highlighted only 32 vacant units equating to a 7.1% vacancy rate. This is below the national average of 11.2%, indicating that Southall is currently performing well in respect of unit occupancy. Since December 2016 our on-site survey indicated that six units have become newly vacant, albeit these are spread out throughout the centre and does not highlight any particular problem areas. In a centre underpinned by small, independent businesses you would expect a certain amount of business operator 'change-over', and in this case, it is not considered significant or a cause for concern. The most notable change is the closure of the large Budgens store on The Broadway, which remains vacant at present.

Customer Views and Behaviour

3.17 The household telephone survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centres, their likes and dislikes, and how they think Southall town centre could be improved in the future. The key findings are summarised below:

i. In terms of frequency of visit, the results reflect both the local centre function and the important Asian retailing offer. When asked how often they visit Southall town centre, 36.3% stated at least once a week, with 8.4% visiting daily. Consistent with the specialist Asia retailing role, superior to many alternative destinations across London, 37.9% visit Southall once or twice a month, whilst 9.1% visit once every 3-6 months, and 9.7% visit once a year. The centre is clearly attracting those undertaking a less regular specialist shopping trip.

ii. The reason for visiting the centre is balanced between convenience (40.1%) and comparison (40.2%) goods shopping, with a further 4.3% visiting a place of worship, 3.6% travelling to/from work, and 3.3% visiting family/friends. Only 0.9% were undertaking a leisure activity, whilst only 2.8% were visiting cafes/pubs/restaurants for their main trip purpose.

iii. When asked what other activities or services they were using, leisure activities remained a low response, with only 5.8% visiting cafes/pubs/restaurants, and 0.3% undertaking an 'other' leisure activity.

iv. The importance of the market to the health and attraction of Southall town centre is reflected in the survey results, with 27.5% choosing to visit on market days. The market is having a strong influence on when and how frequently people choose to visit the town centre.

v. When asked what visitors liked most about Southall town centre, the range and quality of shops scored highly; the highest responses being 'good range of non-food shops' (16.3%), and 'good range of specialist/independent stores' (15.0%). The local catchment is evident with 14.6% stating that they like the centre because it's close to home, whilst others liked the foodstores (8.2%), places to eat (5.4%), the good market (3.3%) and attractive environment (3.3%). The strong community is evident with 8.7% stating that they liked the centre's vibrancy, multi-cultural character, nice atmosphere and friendly people.

vi. Respondents were asked how they think Southall town centre could be improved. The most frequently cited responses related to car parking and traffic congestion, with the highest response being 'more car parking' (30.3%), followed by 'more traffic free areas/pedestrianisation (15.6%), 'cheaper/free parking' (8.5%) and 'less traffic congestion' (4.8%). A need to improve the choice and quality of shopping is evident (10.7%), whilst an additional 2.9% noted the need for larger shops/department stores. Improved maintenance and cleanliness was cited by 14.6%, and a desire to tackle anti-social behaviour was favoured by 9.8%.

vii. Dwell time is generally between 30 minutes and 3 hours, a reasonably healthy indicator for a Major Centre which generally serves a more 'local' role. As identified above, Southall does attract a more 'infrequent' visitor from further afield as a consequence of the specialist and superior Asian shopping function; this is likely to drive longer dwell times as people have travelled a longer distance and browse and shop throughout a strong mix and large scale of floorspace:

   a. 30 minutes-59 minutes: 14.0%

   b. 1 hour – 1 hour 59 minutes: 29.7%

   c. 2 hours – 2 hours 59 minutes: 27.5%

viii. Most visitors to Southall town centre travel by car (58.7%), 22.9% travel by bus, 12.3% walk, and 4.3% use a taxi.

ix. Those who travel by car were asked where they park, with the highest response being 'on-street' (25.9%). Alternatives include Herbert Road car park (20.8%), Southall Market (8.7%), Fairlawn car park (4.0%) and Iceland car park (3.8%).

Summary

- Southall is a vibrant multi-cultural centre, reflected in the strong mix of Asian/ethnic food and non-food operators, high proportion of small independent businesses, and limited range of mainstream comparison and multiple foodstore operators.

- The centre performs a local shopping centre function with 36.3% of respondents visiting at least once a week and 12.3% walking to the town centre. There is also strong evidence of its attraction to a wider catchment, with infrequent visits, longer dwell times and high car usage, likely linked to its reputation as one of the strongest Asian retail destinations in the capital.
- We conclude that the centre, in its current form, is vibrant and healthy, and whilst operator 'churn' is to be expected in some large centres dominated by small businesses, the vacancy rate is low. The market performs a key role in the attraction of the centre, influencing visitor days; and the mix of retailing across the town centre is generally well liked and supported. There is a strong sense of community which was reflected by a number of respondents.
- A key weakness identified is the limited leisure service offer in the form of cafes, restaurants and pubs; less than 6% of visitors were undertaking a 'leisure' activity in the town centre. This might reflect a lack of consumer demand, but any enhancement in this sector will add to the attraction of the centre, extend dwell time, and increase spend.
- In planning for the future, the consumer aspiration for an improved choice, quality and mainstream multiple operator mix should be recognised; whilst maintenance, cleanliness and anti-social behaviour was identified as a key area for improvement by a high proportion of survey respondents. An improved eating/drinking leisure offer is likely to form part of a new retail mix on the Southall Gas Works site.

4. Acton District Centre

4.1 Acton is defined as a district centre in the London Plan. It is situated in the east of the borough, closest to Central London, and has many of the characteristics of an inner-city area. It is a heavily built up urban environment that stretches north to the strategically important industrial and commercial area of Park Royal, south to the South Acton estate, and west/south towards the more affluent suburbs of Ealing and Chiswick. Acton is the third largest centre in the borough and comprises 269 shop units, predominantly located on the High Street, King Street (pedestrianised), and Churchfield Road.

4.2 As set out in Section 2, the borough's Development Strategy confirms that the town centre is well-used, and has a district centre role. A location close to Central London and Westfield inevitably restricts the centres catchment and ability to grow beyond its current position in the retail hierarchy, but there are mixed-use development opportunities to facilitate the improvement, consolidation and expansion of retail, leisure and cultural floorspace. Acton main line station – located in the east of the town centre on Churchfield Road – is benefitting from major improvements as part of the Crossrail project, introducing a new ticket hall, footbridge, platform extensions and a range of other aesthetic/security enhancements.

4.3 In the future, Acton is identified as a major focus for growth, with the regeneration effort concentrated on three main places including Acton town centre, south Acton and Acton main (rail) line. As set out in Section 2, the overall objective for Acton town centre is to regenerate and maintain and enhance its position as a district shopping centre.

Diversity of Uses/Retailer Representation

4.4 Based on the latest survey undertaken by Experian Goad (October 2016), Acton town centre currently comprises 40,319 sq m gross retail, leisure and service floorspace across 269 units. Table 4.1 and 4.2 below set out the diversity of uses in Acton town centre compared to the national average in respect of town centre composition.

Table 4.1: Acton Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	33	12.3	8.7	3.6
Comparison	34	12.6	31.5	-18.9
Leisure Service	86	32.0	23.7	8.3
Retail Service	44	16.4	14.2	2.2
Financial and Business Service	39	14.5	10.4	4.1
Vacant	31	11.5	11.2	0.3
Misc	2	0.7	0.1	0.6
Total	269	100	100	-

Source: Experian Goad, October 2016

Table 4.2: Acton Composition of Uses (Floorspace)

	Floorspace sq m	% of Total	UK Average (%)	Variance
Convenience	7,915	19.6	15.3	4.3
Comparison	3,623	9.0	35.5	-26.5
Leisure Service	14,437	35.8	24.8	11.0
Retail Service	4,803	11.9	6.9	5.0
Financial and Business Service	4,310	10.7	7.9	2.8
Vacant	5,017	12.4	9.5	2.9
Misc	214	0.6	0.1	0.5
Total	40,319	100	100	-

Source: Experian Goad, October 2016

4.5 The district centre role of Acton is reflected in the category composition set out above, which demonstrates the strong representation of convenience, leisure service, retail service and financial and business services. The number of units and level of floorspace occupied by comparison goods retailers is substantially lower than the national average, occupying just 12.6% (34) of total units (269). Within the comparison category, the four sub-categories which have the strongest representation when compared to national average figures include chemists and drugstores, electrical and other durable goods, hardware and household goods, and newsagents/stationers.

4.6 Comparison goods national multiple retailers are limited to just Boots the Chemist, Savers health and beauty, Vodafone telephones, and Snappy Snaps film developing, all located in close proximity on High Street, adjoining the entrance to the (under construction) Oaks Shopping Centre.

4.7 The number of units and level of convenience goods floorspace is above the national average, anchored by a large Morrisons foodstore with free town centre car park (c.350 spaces). The store is 3,143 sq m

net and can been accessed from the car park at the High Street junction or from King Street, the central pedestrianised piazza. Product range is focused predominantly on convenience goods and includes a bakery, butchers, café, fishmonger, oven fresh and salad bar. There is also a small Sainsbury's local on Churchfield Road, east of the Oaks development sites northern boundary.

4.8 There are a number of independent convenience goods operators scattered throughout the centre, including a fishmonger, food and wine, grocers, and bakers on Churchfield Road, a convenience store and butchers on Horn Lane, and a number of grocers, convenience stores and bakers on High Street; a number of these are focused on ethnic food products.

4.9 Acton town centre has an above average provision of leisure service, retail service and financial and business operators. In the leisure service category, Acton has an above average provision of almost all sub-categories including cafes, restaurants, betting offices, clubs, disco's, hotels, public houses, and fast food take-aways, the latter occupying 26 units. The restaurant sector offers a variety of options of varying quality including Thai and Italian on Uxbridge Road; Italian, Japanese and Indian on Churchfield Road; and Middle Eastern on Horn Lane. There is also a large McDonalds and Wetherspoons public house, and a strong café culture (17 units). There are no cinemas in the town centre.

4.10 In the retail service category, the strongest sub-categories when compared to national average data include fancy dress hire, health and beauty, opticians, travel agents and vehicle repairs. There is a dry cleaner, and a Post Office located adjacent to the Morrisons foodstore on King Street. The largest financial and business sub-category is 'Property Services' (Estate Agents), which has 19 operators across the town centre – substantially above the national average.

4.11 A new leisure and cultural facility is located to the east of the town centre on High Street, adjacent to the Old Town Hall site. 'Everyone Active' has a large gym, two swimming pools, two dance studios, multi-purpose rooms and a library. The adjoining Grade II listed Old Town Hall dates from March 1910 and is currently being converted and extended to provide 71 new 1/2/3 bedroom homes; 57 for private sale, and 14 for shared ownership.

4.12 There are clear signs of gentrification in Acton town centre, focused predominantly along the length of Churchfield Road, perhaps a consequence of the 'Crossrail' effect, and growth in investor confidence in this particular areas/town centres. Operators include The Rocket pub, Churchfields Café, Park & Bridge West London Wine Shop, Bake Me café, Vindinista Wine Bar, Hasu Sushi, Tailor Made café, Otto Interior Designs, The Blend House café, and The Garden Flowers florist.

Acton Market

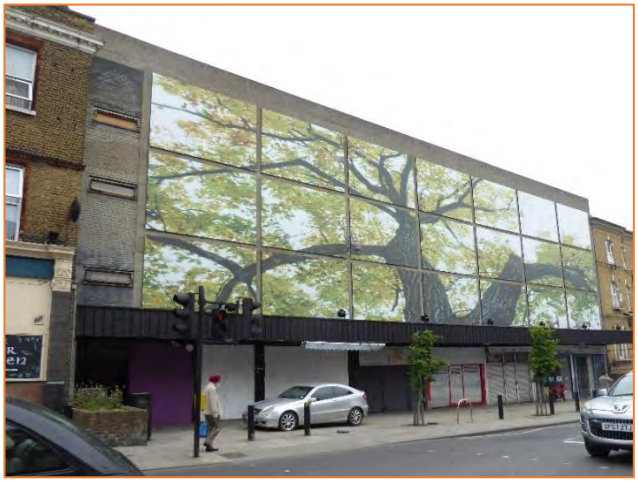
4.13 Acton market has been trading since 2005 following grant funding from the London Development Agency.

4.14 Today the market trades from 10am to 5pm Wednesday to Saturday and sells a range of products on different days, including fashion, household goods, jewellery, food and beverage, shoes, and fruit and veg. On Saturdays, there are arts and craft stalls and handmade goods made by local traders. Ealing Council invested in the public realm on the pedestrianised King Street/The Mount in 2006, which was then allocated to the Acton Market.

Vacant Units

4.15 The proportion of vacant units identified by Experian Goad is consistent with the national average, and since the survey in October 2016 only two units have become newly vacant. HSBC, previously located on High Street, has now left the town centre; and the Aeronaut public house is being redeveloped. The parade of shops at 40-48 High Street is now entirely vacant and boarded up, with a tree montage picture [image below] covering the run-down nature of the building; there was no development/refurbishment activity evident at the time of the site survey (May 2017). The Oaks

Shopping Centre has been demolished and is currently being redeveloped; the site was excluded from the most recent Experian Goad survey and has not therefore had an impact on vacancy rates.



Customer Views and Behaviour

4.16 The household telephone survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centres, their likes and dislikes, and how they think Acton town centre could be improved in the future. The key findings are summarised below:

i. Respondents were asked how often they visited Acton town centre, and 34.1% stated once a week or more regularly, 10.3% visit every two weeks, 24.1% visit once a month, and 4.3% visit once every two months. The remaining 27.2% visit less often. The daily visitation rate (2.6%) is the lowest of the four centres, compared to Greenford (12.6%), Hanwell (10.6%) and Southall (8.4%).

ii. The main trip purpose was 'food shopping' (59%), followed by a leisure activity (13%), non-food shopping (8.9%), visiting family/friends (6.9%), visiting other services such as laundrette/hairdresser (2.5%) and visiting banks/financial services (1.4%). The limited non-food trip purpose is consistent with the findings in respect of diversity of uses/retailer representation, which highlighted a limited comparison goods shopping offer.

iii. When asked if they chose to visit on market days, 19.1% of respondents said yes, reflecting the importance of the market to the overall health, vitality and viability of Acton town centre.

iv. A limited retail offer is reflected in response to the question probing what people like about Acton town centre, with 30.4% stating that it was 'close to home'; only 6.9% noted the good range of non-food shops, 3.5% the good market and 4% the vibrant/multi-cultural atmosphere. The results suggest that Acton is a town centre of convenience/proximity, rather than a 'destination' offering strength of mix, quality and range of retail/leisure operator.

v. Respondents to the survey were asked how they would improve Acton town centre. The three key areas were focused around mix and quality of shops, maintenance/appearance, and traffic congestion. In terms of mix and quality of shops, 27.8% would like a better choice of shop, better quality of shop and more large shops/department stores; 18.6% noted a desire for better maintenance/cleanliness, an improved appearance/environment and a general 'revamp'; and 10.3% would like more car parking, more pedestrianisation, less traffic congestion and an improved bus service.

vi. Consistent with the retail/leisure offer and Acton's role as a district centre, dwell time is relatively limited with 71.7% only staying up to 2 hours. A further 13.6% stay between 2 to 3 hours. A strong 'café culture' recognised above is likely to be assisting longer dwell times.

vii. The majority of visitors travel by car (41.8%), followed by 'walking' (23.1%), bus (22.8%), train/tube (7.1%), and cycling (4.5%). Vehicular drivers choose to park in the Morrisons car park (26.5%), on-street (24.1%), in the Churchfield Road car park (15.4%), and in the Salisbury Street car park (6.9%).

Summary

- The performance of Acton town centre is consistent with its defined role as a district centre. It's location close to Central London and Westfield Shopping Centre will continue to restrict a wider, more dominant shopping role but investment and change is ongoing, most notably through the redevelopment of the Oaks Shopping Centre, Crossrail station improvements and the conversion of the Old Town Hall to residential. Such investment is responding to the policy aspiration to reinforce and consolidate the centre's district centre status and vibrancy through town centre living.
- The comparison shopping offer is particularly limited, and there is a greater focus on convenience goods shopping centred on Morrisons, but also underpinned by a good range of independent businesses. Morrisons is the key anchor retailer in the town centre and most popular location to park, thereby anchoring the western/central part of the town centre. The redevelopment of the Oaks Shopping Centre will improve the comparison goods shopping offer and provide a stronger anchor towards the eastern end of the town centre.
- The analysis has identified a good range of leisure, retail and financial services providing access to everyday goods and products, whilst a strong café culture is assisting in evidence of longer dwell times (2-3 hours) than would perhaps be expected in a district centre. The town centre mix is currently serving a largely local catchment area, with convenience goods, leisure activities and the market underpinning trip purpose and a diverse mix of operator. Moving forwards, visitors would like to experience an improved range and quality of shop, an enhanced environment and a reduction in traffic congestion and consequent improved shopper experience.

5. Greenford District Centre

5.1 Greenford is located in the west of the borough and defined as a District Centre within the London Plan. It is the main centre serving residents living in the north-west part of the borough, and mainly serves residents of Greenford, Northolt and parts of Perivale and north Southall. Greenford is largely suburban and residential in character consisting mainly of 1930s and 1950s properties, and has a less 'built up' geography than the eastern part of the borough, with open space including Horsenden Hill and parts of Northolt and Greenford Countryside Park (Green Belt). There is considerable commercial presence including the Greenford Industrial Estate and Greenford Green.

5.2 The District Centre is located at the crossroads with Greenford Road and Ruislip Road East/The Broadway, with the prime retail area extending eastwards along The Broadway and northwards on both Oldfield Lane South and Greenford Road. The Greenford Road A4127 is a busy through-route with heavy traffic, whilst The Broadway B455 is a quieter local road, and more pedestrian friendly as a retail destination.

5.3 The borough's Development Strategy states that the Greenford area will be a focus for growth although the overall quantum of development will be considerably smaller than Acton, Ealing, Park Royal or Southall. The strategy confirms that the regeneration effort will be concentrated on four main places including Greenford town centre, Greenford Station and Westway Cross, Greenford Green, and Greenford Depot; the objective for Greenford town centre being to maintain and enhance its position as a district shopping centre.

Diversity of Uses/Retailer Representation

5.4 Based on the latest survey undertaken by Experian Goad (November 2016), Greenford district centre comprises 22,091 sq m gross of retail, leisure and service floorspace across 156 units. Table 5.1 and 5.2 below set out the diversity of units in Greenford town centre compared to the national average in respect of town centre composition.

Table 5.1: Greenford Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	36	23.1	8.7	14.4
Comparison	27	17.3	31.5	-14.2
Leisure Service	32	20.5	23.7	-3.2
Retail Service	27	17.3	14.2	3.1
Financial and Business Service	26	16.7	10.4	6.3
Vacant	7	4.5	11.2	-6.7
Misc	1	0.6	0.1	0.5
Total	156	100	100	-

Source: Experian Goad, November 2016

Table 5.2: Greenford Composition of Uses (Floorspace)

	Floorspace sq m	% of Total	UK Average (%)	Variance
Convenience	8,008	36.3	15.3	21.0
Comparison	3,651	16.5	35.5	-19.0
Leisure Service	4,756	21.5	24.8	-3.3
Retail Service	2,388	10.8	6.9	3.9
Financial and Business Service	2,629	11.9	7.9	4.0
Vacant	585	2.7	9.5	-6.8
Misc	74	0.3	0.1	0.2
Total	22,091	100	100	-

Source: Experian Goad, November 2016

5.5 The strongest category is the convenience (food) sector, totalling 36 units – 14.4% above the national average. The three main foodstores including Tesco Metro, Lidl and V.B & Sons. Tesco Metro is located on Greenford Road and provides a large, good quality modern store, open from 6am to midnight (11am-5pm Sundays). The car park (c.30 spaces) provides a pedestrian route through to The Broadway between Greggs and Peter John shoe shop.

5.6 Lidl is located to the east of the centre on Ruislip Road East, forming part of a new mixed use residential/retail development (see image below). The store (1,264 sq m net) is around the same size as Tesco Metro; it is open 8am-10pm (11am-5pm Sundays) and has a fresh in-store bakery and customer car park. Iceland (528 sq m net) is located on the Broadway, close to the junction with Oldfield Lane South; and a large ethnic supermarket – 'V.B. and Sons' - similar in size to Tesco Metro and Lidl – is located on Oldfield Lane South.

5.7 Elsewhere in Greenford town centre, there is a strong representation of smaller independent convenience stores with a particularly strong concentration on the parade of shops at the southern end of Oldfield Lane South. These include Donya Quality Food, Pick 'N' Choose grocer, Pamir Bakery, Greenford Halal Butcher, Fish 4 You fishmonger, Wenzel's the Bakers, Ambiha convenience store, and Halal meat centre butchers. Other operators throughout the centre include Greggs Bakers, McColl's convenience store, Delight Supermarket and Kabul Bakery. A further concentration is located on Greenford Road adjacent to Tesco Metro.

5.8 Perhaps consistent with a district centre role and strong convenience goods representation, Greenford has a below average proportion of comparison goods operators. There is a good mix of chemists and hardware/household goods operators, but only four retailers in the shoes and clothing sub-categories; these include Shoe Zone, Peter John footwear, Kevin's schoolwear and a small unit occupied by Apache ladies/menswear. 'Shu-Time' on The Broadway has recently closed and is now occupied by Holland and Barratt. National multiple comparison goods operators are limited, and in addition to Shoe Zone includes Boots the Chemist.

5.9 The proportion of units occupied by financial and business services is above the national average and includes Santander Bank, Nationwide Building Society, Halifax Bank, Barclays and TSB – all located on the central/prime retail area on The Broadway. Retail services (25 operators) are also above national average, largely driven by the representation of 15 health and beauty salons. There is also a Post Office, three opticians and two dry cleaners.

5.10 Greenford district centre has a weak representation of leisure service uses, below the national average, and dominated by betting shops (5) and fast food take-aways (13). There are five restaurants, including Indian cuisine and one Polish restaurant, and only three cafes. Unit occupancy throughout Greenford town centre is strong, with a vacancy rate of only 4.5% - 6.7% below the national average.

5.11 Greenford Community Market is a monthly event on the High Street along Ruislip Road in Greenford Town Centre, near Greggs and Iceland. The market takes place on the last Saturday of every month between 11am-4pm, and is a developing project and reliant on the support of local traders, shoppers

and volunteers. They aim to have a different theme each month which will promote community organisations, campaigns and encourage more shoppers to come to Greenford.

Customer Views and Behaviour

5.12 The household telephone survey asked a series of qualitative and attitudinal questions probing respondents about their usage of the town centres, their likes and dislikes, and how they think Greenford town centre could be improved in the future. The key findings are summarised as follows:

i. The local retail offer and catchment is reflected in frequency of visit. A large proportion shop in Greenford town centre regularly; with 12.6% visiting daily and 47.2% visiting between 6 times a week and once a week. A further 10.7% visit once every two weeks, and 17.9% visit once a month. Less frequent visits are rare, reflecting the local nature of the retail offer in Greenford town centre, rather than a less frequent 'destination driver' from further afield;

ii. When asked what their main purpose of their trip to Greenford was, the most frequently cited response was non-food shopping (42.3%) followed by food shopping (37.8%), banks (5%) and a leisure activity (2.1%). A small percentage were in the centre as they travelled through the centre for school/college/work;

iii. The absence of an established and regular market is reflected in the survey results. When asked if respondents chose to visit on market day, 97% said 'no'; although 3% did state that they chose to visit on the day of the monthly market;

iv. Visitors were asked what they most liked about Greenford town centre, and the top response was 'close to home' (20.4%) again reflecting the district centre localised shopping role. Other responses included 'good range of non-food shops' (19.2%), 'easy to park' (11.8%), an 'attractive environment' (10.6%), good range of specialist/independent stores (4.8%), and good foodstores (3.8%);

v. When asked how they thought Greenford could be improved, 17.9% stated a better choice of shops, following by 'more car parking' (11.5%), 'better quality shops' (9.9%), 'improve security/CCTV' (8.1%), 'more large shops' (5.6%), 'improve bus services/access' (5.6%), and 'better maintenance/cleanliness' (4.5%);

vi. Dwell time again reflected local, small-scale shopping trips, with 85.1% staying 2 hours or less. Within that time bracket, 13.2% stayed less than 30 minutes, and 37.8% stayed between half an hour and one hour. It is unusual for visitors to stay longer than 2 hours;

vii. When exploring mode of travel, 62.2% travel to Greenford by car, followed by walking (18.5%) and bus (17.7%). The majority of visitors' park in Greenford Broadway car park (61.7%), behind the prime retail pitch located on Greenford Road, The Broadway and Oldfield Lane South. Elsewhere, people park on-street (3.1%), in the Tesco car park (5.5%), and in the Lidl car park (3.5%).

Summary

- Greenford is a well-established District Centre serving the less urban north-west part of the borough. The centre comprises a busy highways cross section, although The Broadway and Oldfield Lane South have less traffic and wider, pedestrian friendly pavements. The findings demonstrate a centre serving a localised catchment and their everyday retail and service requirements.
- The convenience sector is strong, anchored by a good quality Tesco Metro, new Lidl foodstore and an Iceland, alongside a high number of specialist and independent convenience goods businesses. The centre has a good range of banks and health and beauty salons, and offers a Post Office and a selection of opticians and dry cleaners. The vacancy rate is exceptionally low, and the market – whilst in its infancy – offers a (monthly) supplementary retail offer promoting community and local enterprise.

- The comparison retail category is underpinned by household goods and chemists, and the representation of clothing and footwear operators is negligible. The café and restaurant offer is particularly limited, and the leisure services category is instead dominated by a high proportion of betting shops and fast food take-aways. Moving forwards, visitors would like to see an improved choice and quality of shop, and it would be beneficial for the centre to consider restricting any further proliferation of betting shops.

6. Hanwell District Centre

6.1 Hanwell is defined as a District Centre in the London Plan. It is located in the centre of the borough, west of Ealing, east of Southall and south of Greenford on the Uxbridge Road A4020. With 169 retail and shop units it is the third largest major/district centre in the district after Southall and Acton. The strongest pedestrian flows continue to be evident around the Clock Tower in the centre of the town, but footfall and retail units also stretch north/south on Boston Road, and to the north of the centre on Broadway.

6.2 The borough's Development Strategy notes that Hanwell's residential neighbourhoods are mostly well-established terraces with private gardens and small public parks and green spaces adding to the distinctive character and attractiveness of the area. It is less self-contained/high density than other centres, but has a strong community feel to the area. At the time of the site visit, there was clear evidence of ongoing investment and construction work focusing on the public realm, highways and pedestrian priority measures. High quality paving and planting was being finalised around the Clock Tower providing a strong focus and stronger identity for Hanwell town centre.

6.3 Moving forwards, Hanwell is not identified as a major focus for growth and investment in the borough. It is intended to maintain the status of Hanwell as a district shopping centre, and there are plans to enhance and consolidate the town centre, with some small-scale planned growth in retail floorspace.

Diversity of Uses/Retailer Representation

6.4 Based on the latest survey by Experian Goad (July 2016), Hanwell District Centre comprises 24,275 sq m gross of retail, leisure and service floorspace across 169 units. Table 6.1 and 6.2 below set out the diversity of units in Hanwell town centre compared to the national average in respect of town centre composition.

6.5 The proportion of convenience goods operators is broadly in line within the national average (0.8% above), anchored by Lidl which is accessed via the Uxbridge Road to the east of the town centre. The store has a floorspace of 854 sq m net, is open 8am-11pm (11am-5pm Sundays), and has customer car parking and an in-store bakery. A small Nisa store (105 sq m net) is located on Uxbridge Road to the west of the town centre, and the remaining 14 units provide a mix of operator including a baker,

two butchers, six convenience stores, a fishmonger, three grocers and an off licence. Like other centres across the borough, the mix of convenience operators do include an ethnic product range.

Table 6.1: Hanwell Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	16	9.5	8.7	0.8
Comparison	38	22.5	31.5	-9.0
Leisure Service	38	22.5	23.7	-1.2
Retail Service	35	20.7	14.2	6.5
Financial and Business Service	23	13.6	10.4	3.2
Vacant	18	10.7	11.2	-0.5
Misc	1	0.6	0.1	0.5
Total	169	100	100	-

Source: Experian Goad, July 2016

Table 6.2: Hanwell Composition of Uses (Floorspace)

	Floorspace sq m	% of Total	UK Average (%)	Variance
Convenience	2,592	10.7	15.3	-4.6
Comparison	8,491	35.0	35.5	-0.5
Leisure Service	4,766	19.6	24.8	-5.2
Retail Service	2,926	12.1	6.9	5.2
Financial and Business Service	3,595	14.8	7.9	6.9
Vacant	1,839	7.6	9.5	-1.9
Misc	65	0.3	0.1	0.2
Total	24,275	100	100	-

Source: Experian Goad, July 2016

6.6 The proportion of retail service and financial and business services are above the national average. There are 35 (20.7% of total) retail service operators, 6.5% above the national average; the mix is dominated by health and beauty salons (22 businesses), and there are three dry cleaners and a Post Office. Hanwell does not have any opticians or travel agents, but there are a number of vehicle repair shops.

6.7 The proportion of financial and business services (13.6%) is also above the national average (10.4%), but whilst there are employment/careers businesses, financial and legal office services, and a number of estate agents, there are no high street banks. Residents in the local catchment are required to travel further afield to access banking facilities.

6.8 Hanwell has a limited comparison goods shopping offer – consistent with its district centre role. Of the 169 units, 38 are occupied by comparison retailers and, aside from Poundland adjoining Lidl, none can be considered major high street multiple businesses. The dominant business type is focused on household/durable goods including carpets and flooring, DIY & Home Improvement, electrical goods, furniture, textiles and soft furnishings and hardware and household goods. There are no clothing or footwear operators, and only one chemist trading in the town centre at present. A dated Wickes store continues to trade in the south of the town centre on Boston Road; the site is an allocated development opportunity and there is little sign of investment in recent years.

6.9 Leisure services are broadly in line with national average levels, with business representation located predominantly on Uxbridge Road. Fast-food take-aways are most dominant (14 units), offering a mix of pizza, fish & chips, Chinese and kebabs. The Kings Arms and Duke of York pubs occupy central, large units; and the site visit recorded recent investment in the 'Clocktower Café' and 'Ram Thai Restaurant', both offering high quality and attractive destinations for visitors to the centre. Restaurants (8 units) on Uxbridge Road offer Italian, Greek and Indian cuisine. Despite the concentration of fast food take-aways, Hanwell does offer a reasonably good mix of cafés and restaurants.

6.10 Gold's gym health club is a large facility to the east of the town centre offering cardio and strength training equipment, exercise classes and a swimming pool.

6.11 Vacancy rates are just below the national average, with a small number of units scattered along the Uxbridge Road and a stronger concentration on Boston Road where the retail offer is more dispersed with residential uses.

Hanwell Town Team

6.12 Hanwell Town Team is made up of traders, residents and council officers with the objective to maintain the town centre and deliver town centre projects. There are a number of projects aimed at complementing the town square that will be built around the clock tower:

- A street market;
- An art installation;
- Lighting;
- Repair tired shopfronts;
- Fill vacant units with pop up activities;
- A herb garden next to the clock tower that will be maintained by local school children;
- A community garden and urban meadow in adjoining areas.

6.13 The project is intended to help shape Hanwell's future and create a town centre that locals can be proud of, as well as used on a daily basis to shop, meet, talk, work and enjoy. The new town square will be promoted as a destination for visitors with events such as the Hanwell Hootie, food festival and Christmas market to attract new people into the area. Changes and investment which substantially enhance the town centre, particularly around the central square and clock tower, were evident during site surveys in May 2017.

Customer Views and Behaviour

6.14 The household telephone survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centres, their likes and dislikes, and how they think Hanwell town centre could be improved in the future. The key findings are summarised below:

i. Hanwell performs the role of a local shopping centre, and consistent with this role has a relatively high frequency of visit. Daily visits are undertaken by 10.6% of those using Hanwell; and this is followed by a further 40.3% visiting between once a week and six times a week – the most cited response being once a week (28.5%). A further 8.1% visit once a fortnight, 14.7% once a month, 15.7% once every 2 months and 5.3% once every 3-4 months;

ii. The highest response when asked about the main purpose of their trip was food shopping (52.7%), following by non-food shopping (24.6%), visiting retail services (e.g. hairdressers) (5.8%), visiting family/friends (5.7%), visiting cafes (2.1%), and undertaking a leisure activity (2%);
iii. When asked 'what else' they will be doing in Hanwell town centre, 14.8% stated visiting a café/pub/restaurant, and 7.7% stated that they would be undertaking a leisure activity. This reflects the reasonable good café/food/beverage offer discussed above, and also the presence of the Golds Gym Health Club;
iv. The diversity of uses discussed above is also reflected in respondent's answers when asked what they like about Hanwell town centre. The highest response was that the town centre was close to home (22.1%), but a strong proportion of people noted the attractive environment (16.2%), the nice atmosphere/friendly environment (9.1%), the good range of places to eat (8%), the good range of independent/specialist stores (7%), the Lidl store (5.1%), the good range of services (such as hairdressers) (5.1%) and the good range of pubs (4.8%);
v. When asked what people would like to see improved in Hanwell town centre, the responses suggest that visitors want a continuation of the investment currently taking place. The most cited response was a better choice of shops (14.5%), perhaps reflecting the weak provision of chemists, travel agents, opticians and high street banks. Other responses included 'better maintenance/cleanliness' (11.6%), 'improve the environment' (8.6%), 'more car parking' (6.4%), 'better quality shops' (5.5%), 'a Boots store' (5.2%), and 'stopping anti-social behaviour' (5.2%);
vi. Dwell time reflects mostly short visits, with 16.5% spending less than half an hour in the town centre, 34.1% staying for 30 minutes-1 hour and 24.6% staying for 1 hour-1.5 hours. Reflecting a longer dwell time, 18.1% stay for between 2 to 3 hours;
vii. Most visitors walk to the centre (36.9%), followed by the car (36.5%), bus (19.6%), and bicycle (6.2%). Those who travel by car, park in the Lidl car park (39.3%), and on-street (6.4%).

Summary

- Hanwell is small in scale, serving a catchment in the centre of the borough, restricted in geography by the location of West Ealing, Southall and Greenford, and open space (Osterley/Brentford) to the south. The centre had become run down and unattractive, but investment and management by the Town Team has started to transform the centre through public realm, shop front, highways and environmental improvements – particularly around the central clock tower. The benefits are primarily focused on Uxbridge Road and Broadway, whilst the northern part of Boston Road continues to detract from the town centre environment, struggling to perform with frontages dispersed with residential uses and car garages.
- The centre is used as a local top up shopping destination with a high 'walk-in' rate, high frequency of visit and short dwell times. Food shopping is the main attractor, with Lidl performing as a key anchor, and the majority of car borne visitors parking at the store car park. The centre has a reasonable mix of retail and service businesses, but this is generally dominated by health and beauty salons and fast food take-aways; there are no banks, opticians or travel agents, and only one small chemist.
- Hanwell has a good and improving selection of cafes and restaurants, pubs, independent/specialist stores and a Post Office. There are signs of gentrification. Vacancy rates are low and concentrated off the prime retail pitch on Boston Road. The Gold's gym health club provides a strong attractor in the centre.

7. Need

7.1 In this section we set out our assessment of the need for additional convenience and comparison goods retail floorspace across the whole borough including Ealing Metropolitan Centre. We review the performance of existing floorspace as the basis for forecasting the need for additional retail floorspace to the period 2037, incorporating interim years of 2022, 2027, 2032 and 2037. The quantitative tabulations accompanying this assessment are set out in Appendix 3 (convenience) and 4 (comparison).

7.2 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the 2017 household telephone survey of existing shopping patterns to model the existing flows of available expenditure to the network of centres and edge/out-of-centre retail provision. To develop the baseline position, we have:

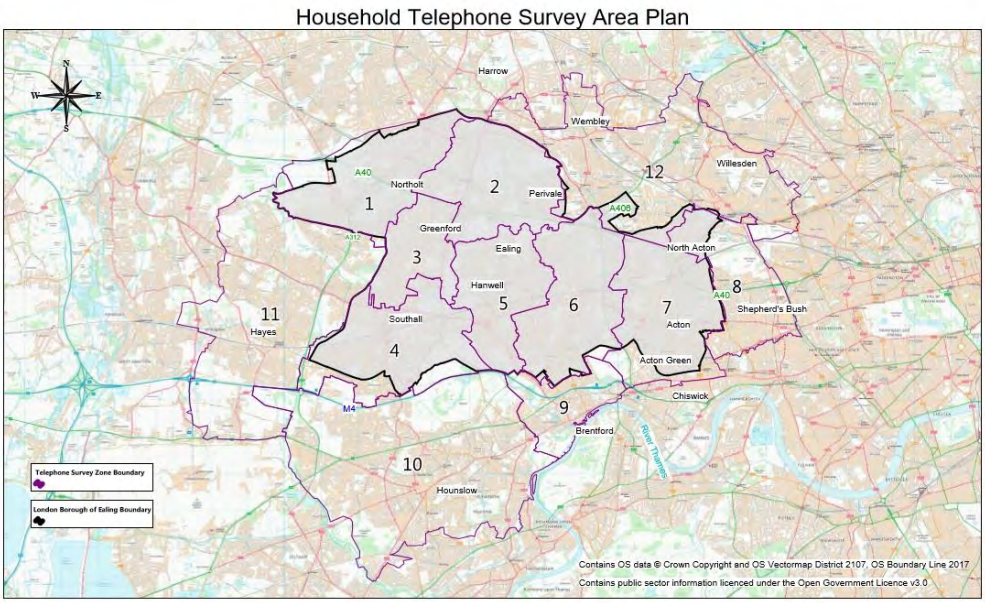
- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Ealing survey area;
- Allocated the available projected expenditure to the convenience and comparison goods shopping destinations, based on the household telephone survey of shopping patterns so as to provide estimates on current sales and forecasts of future sales;
- Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities/performance in each shopping destination.

7.3 Building on the baseline position, we have explored the need for further convenience and comparison retail floorspace within the Borough having regard to the identified performance of existing floorspace.

Survey Area and Household Telephone Survey

7.4 To identify shopping patterns across the Borough and adjoining areas, Urban Shape commissioned a new household telephone survey covering 1,200 households across 12 survey zones, distributed proportionately to the population in each Zone. Urban Shape designed the survey questionnaire in consultation with the Council, and interviewing and data processing was undertaken in May 2017 by NEMS Market Research. The survey area is show on Plan 1, and in Figure 7.1 below.

Figure 7.1: Household Telephone Survey Area Plan



7.5 London is a highly populated dense urban area with a complex network of centres and varied shopping patterns. Our methodology therefore considered a number of zones, of an appropriately small size, to effectively define the local catchment areas of centres including Ealing Broadway, West Ealing, Hanwell, Acton, Greenford and Southall. This is necessary to ensure a robust evidence base to underpin the conclusions and recommendations for each individual town centre.

7.6 The survey results (2017) identify shopping habits of households for both convenience and comparison goods. Where necessary, survey results have been rebased to remove some responses (such as 'don't shop for particular goods' and 'internet shopping') to ensure consistency with categories excluded in the expenditure projections.

7.7 For convenience goods, the household telephone survey included two questions on main food shopping and one question in respect of top-up food shopping. The results of the different types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type:

- 70% main food most visited / 30% main food also visited;
- 70% main food / 30% top up food.

7.8 The weighting forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.

7.9 The household telephone survey also included seven questions on where respondents normally undertake shopping for the following comparison goods types, which coincide with Experian Business Strategies definitions of comparison goods expenditure:

- Clothing and footwear;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances;
- Audio-visual equipment;
- Personal and medical goods; and
- Recreational and luxury goods.

7.10 In order to determine the composite market share for all comparison goods spending within the survey area, we apply the weighted averages of the household telephone survey results for each goods type based on the proportion of per capita spend on that goods type. This process establishes the patterns of comparison spending for residents in each of the survey zones and is an accepted approach which ensures that market shares for centres and stores are not skewed by any particular goods category.

Population

7.11 Population estimates and forecasts for each of the survey zones are derived using the Experian E-Marketer in-house system. This provides estimates of population based on trend-line projections and the 2011 census for small, localised areas. Overall, the population of the survey area in 2017 is estimated to be 816,644. It is forecast to grow to 859,172 by 2022, 896,195 by 2027, and 930,690 by 2032. By 2037, the population of the survey area is forecast to reach 968,705, representing an overall increase of 18.6% over the course of the plan period.

Available Expenditure in the Survey Area

7.12 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure in 2015 prices. We have made deductions for Special Forms of Trading (SFT) which represents expenditure not available to spend in shops (for example internet or catalogue shopping). The deductions we have applied for SFT for convenience and comparison goods are derived from Experian Retail Planner Briefing Note 14 and are set out in Table 2 of Appendices 1 and 2 respectively.

7.13 To estimate available expenditure in the survey area, we have applied growth rates based on economic forecasts published by Experian Business Strategies (Retail Planner Briefing Note 14):

- For convenience goods we have applied growth rates of -1.1% pa between 2015 and 2016; 0% pa between 2016 and 2017; -0.2% pa between 2017 and 2018; -0.9% pa from 2018 to 2019; 0% pa from 2020 to 2024, and 0.1% from 2024-2037.
- For comparison goods we have applied growth rates of 7.2% pa between 2014 and 2015; 4.6% pa between 2015 and 2016; 3.3% pa between 2016 and 2017; 1.4% pa from 2017 to 2018, 1% pa between 2018 and 2019; 3.0% pa between 2019 and 2024; and 3.2% from 2024-2037.

7.14 These growth rates reflect the continued expectation that spending on comparison goods will grow faster than convenience goods, as the scope to purchase more food is more limited. These assumptions take into account continued economic uncertainty and a more tentative market. Using the growth rates above and applying relevant deductions for SFT, total available expenditure across each of the zones and the survey area as a whole has been grown in five year intervals (of 2022, 2027, 2032) up to 2037.

7.15 Table 3, Appendix 1 applies per capita convenience expenditure to the population forecasts, which indicates that total available convenience goods expenditure within the survey area at 2017 is £1,519.8m. This is forecast to grow to £1,566.7m by 2022, £1,630.5m by 2027, £1,694.6m by 2032, and to a total of £1,768.9m by 2037. This equates to an overall growth of £249.1m between 2017 and 2037 (16.3% growth) (Appendix 1, Table 3).

7.16 Table 3, Appendix 2 applies per capita comparison expenditure to the population forecasts, which indicates that total available comparison goods expenditure within the survey area at 2017 is £2,209.6m. This is forecast to grow to £2,541.2m by 2022, £3,085.8m by 2027, £3,737.8m by 2032, and to a total of £4,548.6m by 2037. This equates to an overall growth for comparison goods expenditure in the survey area of £2.3 billion between 2017 and 2037 (106% growth) (Appendix 2, Table 2).

7.17 Longer term projections, beyond 5-10 years – should be treated with caution due to the potential for changing economic circumstances and susceptibility of longer-term forecasts to margins of error. This is particularly the case at present given the uncertain economic outlook.

Convenience Goods Trade Retention/Leakage

7.18 This step in the methodology enables us to calculate the levels of trade retention and leakage from the borough of Ealing. This analysis helps inform our understanding of the baseline performance of existing floorspace, with the findings from the calculation underpinning recommendations on the need to enhance market share in conjunction with town centre strategies and identified development opportunities.

7.19 Table 7.1 summarises the most popular foodstores in the borough, based on turnover derived from the survey area. Consistent with the 2010 West London Retail Study, the two top performing foodstores continue to be identified as the Tesco Extra, Hoover Building Western Avenue and the Waitrose store in West Ealing.

Table 7.1: Most Popular Foodstores in Ealing Borough by Turnover

Foodstore	Turnover (£m)	Sequential Location
Asda, Park Royal (Zone 12)	£102.3m	Town Centre
Waitrose, Alexandria Road, West Ealing (Zone 5)	£55.0m	Town Centre
Morrisons, King Street, Acton (Zone 7)	£47.4m	Town Centre
Tesco Superstore, Hoover Building, Western Avenue (Zone 2)	£37.3m	Town Centre
Sainsbury's, Melbourne Ave, West Ealing	£25.6m	Town Centre
Tesco Metro, Greenford (Zone 3)	£24.8m	Town Centre
Tesco Metro, Ealing Broadway (Zone 6)	£16.4m	Town Centre
Lidl, Uxbridge Road, Hanwell (Zone 5)	£14.6m	Town Centre
M&S, Ealing Broadway (Zone 6)	£14.3m	Town Centre
Morrisons, Ealing Broadway (Zone 6)	£13.7m	Town Centre
Lidl, Greenford (Zone 3)	£11.4m	Town Centre
Sainsbury's Local, Ealing Broadway (Zone 6)	6.4m	Town Centre
TOTAL	**£369.2m**	

7.20 Within the Zone 1-12 Survey Area, the foodstores listed in Table 7.1 have a turnover of £369.2m, equating to a market share of 24.3% within Zones 1-12. This low trade retention is not a cause for concern given the extent of the survey area boundary and localised nature of convenience goods shopping patterns. It is therefore more relevant to focus on local trade retention levels within Zones 1-7, the zones most closely related to Ealing's borough boundary (See Fig.7.1 / Plan 1).

7.21 Within Zones 1-7 of the Survey Area, the foodstores listed in Table 7.1 capture £255.3m of total available expenditure, equating to a market share of 37.7%. These are not, however, the only foodstores in the borough. Combined with the remaining floorspace (listed in Table 5, Appendix 1), existing provision captures £414.9m of total available expenditure, equating to a market share of 61.2%. Ealing borough convenience goods market share has remained relatively stable since the 2007 and 2010 West London Retail Studies, when the borough-wide market share for convenience goods was recorded at 62.2% and 60.8% respectively (Table 7.2).

Table 7.2: Convenience Goods Market Share 2007-2017 [Borough Trade Retention]

2007 West London Retail Study	2010 West London Retail Study	2017
62.2%	60.8%	61.2%

7.22 The remaining trade (38.8%) travels to smaller top-up foodstores within the borough and foodstores located outside the borough, the top five being Tesco, Osterley Park, Isleworth; Tesco Extra, Grencoe Road, Hayes; Sainsbury's, Lombardy Retail Park; Asda, Millington Road, Hayes; and Sainsbury's Alperton Wembley.

7.23 Table 7.3 below sets out the convenience goods market share of each town centre within it's location zone, illustrating how much local trade that town centre retains within a local catchment area, and how much leaks to alternative destinations. The outputs aren't directly comparable given the different scale and geographical composition of each survey zone, but the exercise does provide some indication of town centre performance. Table 7.3 should be read in conjunction with Plan 1.

Table 7.3: Town Centre Location Zone, Convenience Goods Market Share

Town Centre	Location Zone	Market Share
Ealing Metropolitan Centre	Zone 5/6	52.1%
- *Ealing Broadway*	*Zone 6*	*11.3%*
- *West Ealing*	*Zone 5*	*29.0%*
Southall Major Centre	Zone 4	13.5%
Hanwell District Centre	Zone 5	6.5%
Acton District Centre	Zone 7	29.4%
Greenford District Centre	Zone 3	29.2%

7.24 Ealing Metropolitan Centre retains 52.1% of convenience goods expenditure available in Zones 5 and 6 combined (Table 7.3), with West Ealing having a stronger trade retention in it's location Zone – Zone 6 (29%). Southall, located in Zone 4, faces competition from smaller stores in King Street Neighbourhood Centre and larger food superstores outside of the borough including Tesco Extra, Isleworth; Tesco Extra Hayes; Sainsbury's, Lombardy Retail Park; and Tesco Extra Bulls Bridge.

7.25 Hanwell has the smallest trade retention (6.5%), largely due to it's location in Zone 5 and proximity to West Ealing. Acton District Centre is located in Zone 7; it has a 29.4% trade retention, and faces direct competition from Sainsbury's in Chiswick and to a lesser extent, Asda at Park Royal. Greenford District Centre has a trade retention of 29.2% in it's location zone, Zone 3, and competes predominantly with the Tesco Extra store in Hayes, but also Asda at Park Royal, Tesco Hoover Building, and Sainsbury's at Lombardy Retail Park.

7.26 Acton, Greenford and West Ealing are the strongest performing town centres in respect of convenience goods trade retention within their local catchment areas.

Convenience Goods: Floorspace Performance

7.27 The data analysis has enabled us to rank the five study town centres by convenience goods turnover performance (Table 7.4, below). This assists a more in-depth understanding of the performance of each town centre in terms of this particular goods type, and how the centres compare with each other. Ealing Metropolitan Town Centre has the highest turnover, followed by Acton, Greenford, Southall and then Hanwell.

Table 7.4: Town Centre Convenience Goods Turnover

Town Centre	Key Anchor Foodstores	Town Centre Turnover (£m)
Ealing		£161.7m
- *Ealing Broadway*	*Morrisons/M&S/Tesco Metro*	*£64.1m*
- *West Ealing*	*Sainsburys/Waitrose/Lidl/Tesco Express/Iceland*	*£97.6m*
Acton	Morrisons/Sainsburys	£51.5m
Greenford	Tesco Metro/Iceland/Lidl	£46.4m
Southall	Lidl/Iceland	£20.3m
Hanwell	Lidl/Nisa	£15.1m

7.28 We discuss the performance of individual foodstores below, which will directly inform our conclusions in respect of the extent of identified floorspace 'need'.

Ealing Broadway

7.29 Ealing Broadway has five foodstores and several smaller independent convenience goods operators (Table 3, Appendix 1). The analysis demonstrates that the M&S Simply Food on Ealing Broadway comprises the best performing floorspace in the town centre, achieving a sales density of £18,815 per sq m net, higher than published M&S company averages of £9,209 per sq m net.

7.30 Convenience goods floorspace elsewhere in the town centre is generally performing in line with company expectations, aside from the Morrisons store. Based on a net convenience goods floorspace of 2,560 sq m net, we estimate that the Morrisons store has an average sales density of c.£5,351 per sq m net which is substantially below the Morrisons company average sales density of £11,365 per sq m net. The outputs suggest that the store, which opened in 2014/2015, is not meeting expected company average sales densities, and is underperforming.

West Ealing

7.31 West Ealing has the highest convenience goods turnover in the borough (£97.6m) when compared to Ealing Broadway, Southall, Acton, Hanwell and Greenford. The quantitative analysis demonstrates that convenience goods floorspace in West Ealing is performing well, with Waitrose continuing to be the second best performing store in the borough (in terms of turnover) after the Asda store at Park Royal. Based on a turnover of £55m and a net convenience goods floorspace of 2,374 sq m net, the Waitrose store has a sales density of c.£23,168 per sq m net; this is above the company average of £10,844 per sq m net.

7.32 Elsewhere in the centre, Sainsbury's Melbourne Avenue, Lidl The Broadway and Tesco Express are all performing above expected company average levels. Overall, West Ealing has a convenience goods sales density of £10,710 per sq m net, above an expected average of £8,127 per sq m net. The centre has a good range and quality of foodstores, offering a greater number of multiple operators than any other centre in the borough, but is clearly meeting a qualitative need based on the strong performance of this existing convenience goods floorspace.

Southall Major Centre

7.33 As noted in Section 3, Southall is the most ethnically diverse area in the borough and is well known as a vibrant multi-cultural centre. There are few national multiple retailers across the town centre, and in the foodstore sector operators are restricted to Iceland and Lidl, the latter of which replaced Somerfield since the previous 2010 West London Retail Study.

7.34 Both Lidl and Iceland are performing well. Based on a net convenience goods floorspace of 419 sq m and a turnover of £3.8m, the Lidl store has a performance sales density of c.£9,069 per sq m net – above an expected company average sales density of £6,883 per sq m net. The Iceland store is slightly larger, with a floorspace of 479 sq m net and a turnover of £5.1m; this equates to a strong performance sales density of £10,647 per sq m net, compared to a company average of £6,769 per sq m net.

7.35 The Lidl and Iceland foodstores are small, and the remaining floorspace is therefore occupied by a large number of smaller, independent operators selling predominantly ethnic food products. With a net floorspace of 11,301 sq m, 'other local stores' occupy a substantially higher amount of space than other town centres in the borough. Hanwell, for example, offers only 1,943 sq m net of local store floorspace, Ealing Broadway 900 sq m net, and Acton 2,470 sq m net. With a turnover of £11.5m (higher than both Iceland and Lidl), the local store floorspace in Southall has a performance sales density of only £1,017 per sq m net. This is less than we would expect in a Major Centre, but may be in line with individual business expectations of independent traders.

Acton District Centre

7.36 Acton District Centre has the second largest turnover after Ealing Metropolitan Centre, and is anchored by the fourth largest foodstore in the borough – Morrisons on King Street. Based on a net convenience goods floorspace of 2,514 sq m and a turnover of £47.4m, the store has a performance sales density of c.£18,854 per sq m net, considerably above an expected company average level of £11,363 per sq m net. The Sainsbury's Local on Churchfield Road is performing largely in line with company expectations, but the outputs suggest that the floorspace performance of smaller, local shops is low, achieving only £891 per sq m net.

Greenford District Centre

7.37 Greenford District Centre has the third highest convenience goods turnover in the borough after Ealing Metropolitan Centre and Acton District Centre, driven largely by the exceptional performance of Tesco Metro on Greenford Road. With a turnover of £24.8m and a floorspace of only 929 sq m net, it has a performance sales density of £26,695 per sq m net – substantially higher than the company average level of £13,972 per sq m net.

7.38 The analysis demonstrates that there is little competition for the Greenford Tesco Metro in Zone 3, aside from the Tesco Extra Grencoe Road Hayes which has a higher Zone 3 market share, and to a lesser extent, the Sainsbury's superstore on Lombardy Retail Park. The small store is performing a key role and destination for consumers food shopping within this catchment area, thus inflating its sales performance substantially above what you might expect for a store of this scale.

Hanwell District Centre

7.39 Convenience goods turnover in Hanwell is the lowest of any town centre in the borough (£15.1m / Table 7.2 above). The main foodstore operator in Hanwell District Centre is Lidl. Based on a net convenience goods floorspace of 811 sq m and a turnover of £14.6m, the store has a performance sales density of c.£18,002 per sq m net. This is considerably higher than the company average sales

density of £6,883 per sq m net, demonstrating that the Lidl foodstore is performing strongly as the key anchor and only main foodstore in the district centre.

Comparison Goods Trade Retention/Leakage

7.40 For comparison goods, we have calculated the levels of comparison goods trade retention and leakage from the borough of Ealing, to inform the baseline understanding of floorspace performance and the identification of town centres that might need to enhance their market share.

7.41 The shopping patterns derived from the Household Telephone Survey have enabled us to identify the main competing centres in the Ealing survey area and calculate the amount of comparison goods expenditure that each competing centre draws from this area (Zone 1-12). As well as strength of retail offer, this indicator reflects accessibility and distance from the Ealing catchment area. The amount of comparison goods expenditure leaking to competing centres from Zones 1-12 is highlighted in Table 7.5 below.

Table 7.5: Zone 1-12 Market Share by Destination

Centre/Destination	Comparison Goods Trade Draw from Zone 1-12 Survey Area (£m)	% of Total Available Comparison Goods Expenditure (%)
Ealing	£309.2m	14.0%
Westfield/Shepherds Bush	£219.0m	9.9%
Hounslow	£121.7m	5.5%
Uxbridge	£112.5m	5.1%
Hayes	£111.6m	5.1%
Wembley	£100.0m	4.5%
Brent Cross Shopping Centre	£98.6m	4.5%
London West End	£90.7m	4.1%
Richmond	£68.8m	3.1%
Kingston	£64.1m	2.9%
Harrow	£57.5m	2.6%
Hayes Bridge Retail Park	£48.0m	2.2%
Greenford	£43.4m	2.0%
Chiswick	£41.3m	1.9%
Brentford	£35.8m	1.6%
Ruislip	£30.6m	1.4%
Kew Retail Park, Richmond	£29.0m	1.3%
Hammersmith	£26.5m	1.2%
Southall	£23.8m	1.1%
Westway Cross, Greenford	£23.7m	1.1%
Park Royal	£23.4m	1.1%
Ikea, Wembley	£22.9m	1.0%
Acton	£18.6m	0.8%
Lombardy Retail Park, Hayes	£18.5m	0.8%
London Designer Outlet, Wembley	£10.2m	0.5%
Hanwell	£9.4m	0.4%

7.42 Table 7.5 highlights that Ealing is the most dominant town centre in the survey area, drawing £309.2m of comparison goods expenditure; equivalent to 14% of total available expenditure. This largely reflects the geographical location of Ealing in the centre of the survey area, and the extent of the retail and leisure offer at a Metropolitan Centre scale.

7.43 Westfield Shepherds Bush draws £219.0m from Zones 1-12. The destination, which opened in October 2008, is located in Zone 8 where it achieves its highest market share (43.8%); but also draws trade from adjoining Zones 7 (19.5%) and Zone 12 (11.3%), which are in close proximity and easily accessible on the road and bus network and Central Line Underground. Shoppers living in Zones 1, 2, 5 and 6 also visit Westfield (6.4%/7.8%/10.3%/8.7% respectively), with those further afield in Zones 1 and 2 benefitting from direct access on the Central Line.

7.44 Hounslow is a Metropolitan Centre located in Zone 10 to the south of Ealing. After Ealing and Westfield, Hounslow is the third most dominant centre in terms of comparison goods trade draw, attracting £121.7m (5.5% market share) from the survey area. Uxbridge is also defined as a Metropolitan Centre and the fourth most dominant centre. It is located outside of the Zone 1-12 Survey Area to the west of Ealing, and draws £112.5m of comparison goods spend (5.1% market share).

7.45 Table 7.6 sets out the market share and trade retention of each of the Ealing borough town centres within Ealing Borough (Zone 1-7) and also the wider Zone 1-12 Survey Area. Ealing Metropolitan Centre is the strongest centre retaining £245m of borough expenditure (24.9%), followed by Greenford (3.5%), Southall (2.0%), Acton (1.7%) and Hanwell (0.8%). 'Other' destinations, including smaller neighbourhood centres and edge/out-of-centre retail destinations, draw £84.8m of comparison goods expenditure (8.6%). A detailed breakdown is set out in Table 4a, Appendix 2.

Table 7.6: London Borough Ealing Comparison Goods Spending Destinations (2017)

	Zone 1-7 £m	Zone 1-7 Market Share %	Zone 1-12 £m	Zone 1-12 Market Share %
Ealing	£245.0m	24.9%	£309.2m	14.0%
Southall	£19.3m	2.0%	£23.8m	1.1%
Acton	£16.3m	1.7%	£18.6m	0.8%
Greenford	£34.4m	3.5%	£43.4m	2.0%
Hanwell	£7.7m	0.8%	£9.4m	0.4%
Other [Small Centres, Edge/Out-of-Centre]	£84.8m	8.6%	£141m	6.4%
Total Ealing Borough	**£407.5m**	**41.4%**	**£545.4m**	**24.7%**

Source: Table 4a, Appendix 2

7.46 The results of the survey demonstrate that destinations in Ealing borough retain 41.4% of comparison goods expenditure, whilst 58.6% is 'leaking' to competing destinations outside of the borough. Administrative boundaries are not closed systems, and shoppers will always flow into and out of a local authority area, so a % trade retention level is not a definitive guide to the strength or success of the retail/town centre offer. It is, however, possible to compare this level of trade retention over time.

7.47 Table 7.7 sets out borough market share for comparison goods derived from the 2007 West London Retail Study and 2010 West London Retail Study, and the most recent 2017 household telephone survey. It is evident that Ealing Borough retained £394.6m of comparison goods expenditure in 2007, growing to £431.6m in 2009, but falling to £407.5m in 2017.

7.48 This is likely to be the impact of Westfield Shepherds Bush opening in October 2008 and the associated 'settling down' period of trading patterns, often considered to be 2 years. Borough trade retention grew between 2007 and 2009 from 42.8% to 43.7%, but following the opening of Westfield Shepherds Bush, the market share has fallen marginally to 41.4% in 2017. Given the scale, regional role and location of Westfield, we conclude that the borough has been reasonably successful in retaining market share (41.4%) despite no substantial/strategic new development.

Table 7.7: Total Ealing Borough Trade Retention/Market Share [Comparison Goods], 2007-2017

Study Year	Zone 1-7 £m	Zone 1-7 Market Share %
2007	£394.6m	42.8%
2009	£431.6m	43.7%
2017	£407.5m	41.4%

Source: Table 4a, Appendix 2
NB: Zone 1-7 'best fit' geographical area to Ealing borough.
NB: 2010 West London Retail Study based on 2009 Survey

7.49 Table 7.8 focuses in more detail on the localised catchment of each of the borough town centres, setting out their location zone and comparison goods market share within that zone. It has also been possible to compare trade retention in 2007 and 2017 to highlight any change over time. Ealing Metropolitan Centre has lost market share in Core Zone 5, likely due to Westfield opening, but all other centres have experienced an uplift in their localised trade retention levels. Greenford District Centre in particular has seen a strong uplift, from 10% to 19.8% market share in Zone 3.

Table 7.8: Town Centre Location Zone, Comparison Goods Market Share

Town Centre	Location Zone	Market Share % 2017	Market Share % 2007
Ealing Metropolitan Centre	Zone 5	44.6%	52.7%
Southall Major Centre	Zone 4	8.1%	5.5%
Greenford District Centre	Zone 3	19.8%	10.0%
Acton District Centre	Zone 7	7.3%	5.1%
Hanwell District Centre	Zone 5	4.9%	1.9%

Comparison Goods Inflow

7.50 The 2007 West London Retail Study commissioned in-centre surveys to help define the extent of the catchment areas of the five borough town centres. The surveys enabled an estimate of the proportion of shoppers in the centres travelling from beyond the survey area boundary (i.e. the inflow of trade). The survey at that time was larger, covering both Hounslow and Hammersmith & Fulham boroughs and adjoining areas, comprising 30 Survey Zones. The data can be used as a proxy to assist in assumptions about comparison goods inflow to the five centres in 2017, based on our understanding of the town centre network and hierarchy, and change to the study survey area.

7.51 The quantitative need model 2017, set out in Tables 7b and 7c, Appendix 2, has factored in a 15% trade 'inflow' from beyond Zones 1-12 for Ealing and Southall on the basis that Ealing is a Metropolitan

Centre, and Southall has a strong specialist ethnic draw from further afield. A lower level of inflow (5%) has been estimated for the three smaller district centres, Acton, Hanwell and Greenford.

7.52 Tables 7b and 7c, Appendix 2, factor in these inflow levels and set out the turnover (£m) of each of the five borough town centres. We summarise this output in Table 7.9 below.

Table 7.9: Ealing Borough Comparison Goods Town Centre Turnover 2017 (£m)

Town Centre	Turnover (£m)
Ealing Metropolitan Centre	£363.8m
Southall Major Centre	£28.0m
Acton District Centre	£19.5m
Hanwell District Centre	£9.9m
Greenford District Centre	£45.7m

Source: Tables 7b and 7c, Appendix 2

Comparison Good: Floorspace Performance

7.53 This part of the analysis sets out the trading performance of comparison goods floorspace, i.e. the sales density per sq m. The calculations are detailed in Appendix 2, Tables 7b and 7c, and summarised here:

- Ealing Metropolitan Centre has a comparison goods turnover of c.£363.8m. Based on a net comparison goods floorspace of 37,896 sq m, we estimate that the town centre has a sales density of c.£9,600 per sq m net. Based on our experience across London and the South East this is a sound performance, but is a reduction since 2007 when the sales density was recorded as being £11,297 per sq m net. The figures highlight the increase in competition over the last 10 years, particularly the opening of Westfield, Shepherds Bush.
- Southall Major Centre has a comparison goods turnover of c.£28.0m. Based on a net comparison goods floorspace of 14,032 sq m, we estimate that the town centre has a sales density of £1,995 per sq m net; a small increase on the performance recorded in 2007 (£1,637 per sq m net). The level of comparison floorspace in Southall has reduced marginally, inflating sales density, rather than the increase being a consequence of increased turnover.
- Acton District Centre has a comparison goods turnover of c.£19.5m. Based on a net comparison goods floorspace of 2,898 sq m, we estimate that the town centre has a sales density of £6,740 per sq m net; an increase from the performance recorded in 2007 (£4,366 per sq m net). It should be highlighted that the total turnover has fallen considerably from £30m recorded in 2007, and the sales density has improved as a consequence of a significant reduction in comparison goods floorspace over this ten year period, from 6,884 sq m net to 2,898 sq m net. This might be a consequence of proximity to Westfield, and also national trends moving towards a more 'mixed' town centre environment.
- Greenford District Centre has a comparison goods turnover of c.£45.7m. Based on a net comparison goods floorspace of 5,464 sq m, we estimate that the town centre has a sales density of £8,363 per sq m net; a considerable increase since that recorded in 2007 (£3,932 per sq m net). This is a strong performance improvement in the context that the level of comparison goods floorspace remains relatively unchanged.
- Hanwell District Centre has a comparison goods turnover of c.£9.9m. Based on a net comparison goods floorspace of 6,793 sq m, we estimate that the town centre has a sales density of £1,383 per sq m net; marginally higher than that recorded in 2007 (£830 per sq m

net). The figures for Hanwell incorporate the large Wickes bulky goods unit, which is inflating the floorspace, and likely deflating the sales performance of the 'town centre' floorspace to a small extent.

Quantitative Need

7.54 Building on the baseline position discussed above, we have explored the capacity for further convenience and comparison retail floorspace across the borough (global) and within each of the five main town centres. The appropriate distribution of need is discussed in the final section, enabling the local authority to make informed choices about where that need should be met depending on a whole range of other considerations such as site availability.

7.55 Capacity arising in a specific centre does not necessarily mean that it should be met within that centre. A more appropriately located site in a nearby centre may encourage, for example, more sustainable travel patterns and distribution of trade. This is discussed further in the final section of this report, but here we set out capacity by centre – based on current market share – as the necessary baseline starting point.

Convenience Goods

7.56 Based on population and expenditure growth, the detailed performance analysis of existing floorspace, and a sales efficiency for existing floorspace of -0.1% (2017-2022) and 0.1% (2023-2037) per annum, the outputs do identify a 'need' for additional convenience goods floorspace over the plan period to 2037 (Table 7.10).

7.57 As already noted, most foodstores are trading very well (M&S, Ealing; Asda, Park Royal; Waitrose, Ealing; Lidl, Hanwell; Tesco Metro, Greenford; and Tesco Hoover Building); and only Morrisons on Ealing Broadway is identified as underperforming. On balance, convenience goods floorspace across the borough is performing above expected company average levels, leading to a quantitative 'need' for additional floorspace. This is set out in Table 7.10 below.

Table 7.10: Ealing Borough Quantitative Need: Convenience Goods

2022	2027 Sq m net	2032 Sq m net	2037 Sq m net
13,449	14,784	16,143	17,753

Source: Table 6a, Appendix 1 / Note: See paragraph 7.61 below for need conclusion.

7.58 Convenience goods need by centre is set out in Tables 6b and 6c, Appendix 1, and summarised below in Table 7.11 (but should be read in conjunction with paragraph 7.55 above).

Table 7.11: Quantitative Need: Convenience Goods by Town Centre

	2022 Sq m net	2027 Sq m net	2032 Sq m net	2037 Sq m net
Ealing	4,735	5,243	5,737	6,345
Southall	-1,912	-1,832	-1,749	-1,656
Acton	1,494	1,649	1,799	1,983
Greenford	1,451	1,597	1,749	1,927
Hanwell	624	673	722	780

7.59 Town centre 'need', i.e. the level of need arising the five main town centres, equates to 7,330 sq m net of total borough wide need (14,784 sq m net) (2027); the remaining 7,454 sq m net of need is generated by the strong over-performance of both the Asda at Park Royal and Tesco Hoover Building.

7.60 Commitments will act as a claim on this identified level of need, i.e. those developments for new floorspace which have been granted planning permission but which were not built/trading at the time of the household telephone survey undertaken in support of this study. The two convenience goods commitments include:

- Southall: Southall Gas Works, permission for 5,850 sq m gross convenience goods;
- Acton: The under-construction Oaks Shopping Centre, to include a net uplift in retail floorspace of 1,825 sq m gross, with an assumed 50:50 convenience/comparison split.

7.61 We estimate these will absorb c.5,410 sq m net of identified convenience goods need, with new floorspace in Southall being supported through a consolidated market share, new residential community and claw back of lost trade to competing destinations. There is a residual need to accommodate c.9,400 sq m net of convenience goods need across the borough by 2027, based on strong population growth and current floorspace performance.

Comparison Goods

7.62 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and we have assumed an annual growth in existing sales per sq m net of 1.4% throughout 2017, 1% throughout 2018, and then rising to 3.3% between 2019 and 2023, and again to 3.7% between 2024 and 2035. Based on the role and performance of the town centres, we would expect new quality floorspace to achieve at least £8,000 per sq m net.

7.63 This assessment has also assumed that all centres will maintain existing market share and we have forecast the capacity for new floorspace in the years 2022, 2027, 2032 and 2037. The level of borough-wide need for additional comparison goods floorspace is set out in Table 7.12 below, and by town centre in Table 7.13.

Table 7.12: Ealing Borough Quantitative Need: Comparison Goods

2022	2027 Sq m net	2032 Sq m net	2037 Sq m net
2,613	7,637	13,054	22,774

Source: Table 6a, Appendix 2

Table 7.13: Quantitative Need: Comparison Goods by Town Centre

	2022 Sq m net	2027 Sq m net	2032 Sq m net	2037 Sq m net
Ealing	2,002	5,912	10,094	17,632
Southall	249	696	1,181	2,022
Acton	153	442	745	1,294
Greenford	313	946	1,647	2,890
Hanwell	156	298	456	733

7.64 Like convenience goods, commitments will act as a claim on this identified level of need, i.e. those developments for new floorspace which have been granted planning permission but which were not built/trading at the time of the household telephone survey undertaken in support of this study. The two main comparison goods commitments have been identified to include:

- Southall: Southall Gas Works, permission for 14,200 sq m gross convenience goods;
- Acton: The under-construction Oaks Shopping Centre, to include a net uplift in retail floorspace of 1,825 sq m gross, with an assumed 50:50 convenience/comparison split.

7.65 New floorspace in Southall will be supported through a consolidated market share, new residential community and claw back of lost trade to competing destinations. This is unlikely to absorb need arising in the network of other town centres across the borough given the wider place-making and mixed-use regeneration underpinning growth in Southall.

7.66 Over the plan period, Ealing Metropolitan Centre, and the smaller centres, may face increasing competition from centres and retail destinations in the wider sub-region as they improve and extend their retail offer. The challenge for Ealing will be to consolidate the shopping offer and continue to enhance the quality of the mix of retailing in order to maintain (and improve) existing market share and positioning in the sub-regional retail hierarchy. A proactive approach and strategy will be required in the short and longer term to achieve this objective.

7.67 The identification of commitments in Southall and Acton should not, therefore, be viewed as absorbing 'need', but rather strengthening the borough's positioning and platform for further additional growth within the network of town centres.

Summary

- Convenience goods floorspace in Ealing borough is performing well and has retained a consistent (borough) market share over the last 10 years since 2007 – currently recorded at 61.2%. West Ealing, Acton and Greenford town centres are achieving the strongest localised market share in their location zones, whilst Ealing Broadway, Hanwell and Southall are less dominant with a lower market share.
- The strongest performing stores are identified as the M&S store on Ealing Broadway, Waitrose West Ealing, Morrisons Acton, Tesco Metro Greenford, Lidl Hanwell and Asda Park Royal. The new Morrisons on Ealing Broadway is identified as the only foodstore in the borough that is currently under-performing. Based on the composite trading performance of existing foodstores, the analysis identifies a need for additional convenience goods floorspace, equating to 9,400 sq m net by 2027 across the borough.
- In respect of comparison goods, the key change since previous borough-wide evidence based studies is the opening and 'settling down' of Westfield Shopping Centre. The overall borough impact of this has been relatively limited, with evidence identifying a trade retention drop of only 2.3% (from 43.7% to 41.4%). The localised impact on Ealing Broadway has been greater, with Zone 5 trade retention falling from 52.7% in 2007 to 44.6% in 2017, and a corresponding fall in floorspace performance from £11,300 per sq m net (2007) to £9,600 per sq m net (2017). A sales density of £9,600 per sq m net is reasonably strong, but there is clearly room to enhance this moving forward.
- Greenford, Acton, Southall and Hanwell have all experienced an increase in comparison goods floorspace performance. The increase in Acton and Southall is partly a consequence of a reduction in comparison goods floorspace over the last 10 years; whilst the increase in Greenford is strong with relatively little change in floorspace. The sales density in Hanwell has

marginally increased but does include the large Wickes store, which is likely to be deflating sales density in the smaller shop units. Overall, the floorspace performance of the four town centres has marginally improved, with Greenford experiencing the strongest increase.

- The analysis identifies a borough-wide need for 7,600 sq m net comparison goods floorspace to the period 2027 – in additional to identified commitments.

8. Conclusions and Recommendations

8.1 Drawing on previous sections, including the Stage 1 Ealing Retail and Town Centre Study (2017), this section sets out the key conclusions arising from our analysis and considers the scope to accommodate new leisure development in the borough.

8.2 The NPPF advises Councils to plan positively to meet needs arising for town centre uses. Policies should support the vitality and viability of town centres, and allocate a range of suitable sites to meet the scale and type of retail development needed in town centres. This section addresses these requirements and makes recommendations to provide the Council with up to date evidence to prepare suitable strategies for their network of centres.

Policy/Market Context

8.3 The NPPF clearly advocates a 'town centres first' approach and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The NPPF encourages LPAs to positively seek opportunities to meet the development needs of their area. Where physical capacity is not present in a town centre to meet the level of 'need' identified, local authorities are encouraged to find the most appropriate alternative strategy having regard to the sequential and impact test.

8.4 In terms of the market, the period between 2013 and 2016 experienced 'exceptional buoyancy' in consumer spending, albeit this has largely been driven by the low value of goods, heavy discounting and persistent deflation of goods prices. Current forecasts note that economic growth will remain tentative over the plan period, particularly in the short to medium term, with consumer confidence likely to be challenged by a range of factors including the decision by the UK to leave the EU.

8.5 Challenges from competition posed by the internet, multi-channel retailing and out-of-centre developments will continue, and town centres need to have a compelling, diverse offer in order to effectively compete. In a positive 'twist', however, click and collect is now one of the most significant drivers of growth, with evidence demonstrating that these customers visit centres more frequently and make additional purchases whilst in the shop/town. The phenomenon is driving an increase in footfall in our town centres, an outcome being felt by the high street.

8.6 Nevertheless, town centre strategies which support the continued evolution of the high street must continue to be prioritised. This should involve providing a high quality shopping 'experience', maximising the benefits of tourist trade/leisure market, and improving the mix of retail and non-retail outlets to increase length of stay and spend.

8.7 It will important for centres across Ealing to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail/leisure offer from other centres. The on-going pattern of operator polarisation suggests that larger centres are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services.

8.8 The Council's policy framework, including the Development Strategy, Policies Map, Development Sites DPD, and Development Management DPD will all be important tools in helping to sell the offer of Ealing to potential investors. The framework set out by the policy documents clearly articulate the Council's vision for each of the opportunity sites across the borough. This report provides an update on this baseline to take forward to future Local Plan reviews.

Catchment Area/Market Share

8.9 Ealing Metropolitan Centre (including West Ealing), is identified as the most dominant town centre in the wider Zone 1-12 survey area, achieving a 14% market share. This is followed by Westfield (9.9%), Hounslow (5.5%), Uxbridge (5.1%), Hayes (5.1%), Wembley (4.5%) and Brent Cross (4.5%). Within the Zone 1-7 Survey area – broadly reflecting the borough boundary – Ealing Metropolitan Centre has a market share of 24.9%, followed by Westfield (9.7%), London West End (4.7%), Hayes (3.8%), Harrow (3.8%), Hounslow (3.4%), Uxbridge (3.4%) and Brent Cross (3.0%).

8.10 The network of town centres in Ealing borough combined with smaller and out-of-centre floorspace, equates to a comparison goods borough trade retention of £407.5m / 41.4% market share. This analysis identifies that 58.6% of comparison goods expenditure leakage to competing floorspace outside of the borough. As we have noted earlier, administrative boundaries are not closed systems, and shoppers will always flow into and out of a local authority area, so a % trade retention level is not a definitive guide to the strength or success of the retail/town centre offer.

8.11 Our analysis has, however, compared levels of comparison goods trade retention over time as a proxy to gauge performance, drawing on the previous 2007 and 2010 West London Retail Studies. Overall, borough trade retention has increased from c.£395m in 2007 to c.£432m in 2009, but fallen to c.£408m in 2017. These levels equated to a market share of 42.8% (2007), 43.7% (2010) and 41.4% (2017). Ealing Metropolitan Centre has experienced a fall in core Zone 5 market share from 52.7% (2007) to 44.6% (2017).

Ealing Metropolitan Centre

8.12 Conclusions in respect of Ealing Metropolitan Centre were set out in the Stage 1 Ealing Retail and Town Centre Study (2017). We set these out below and add new detail on floorspace performance.

8.13 Planned investment in Ealing Metropolitan Centre has moved forwards in recent years, with Dickens Yard and the Cinema site now under construction. Dickens Yard will offer some good quality retail space, although a recent change to the planning permission suggests a greater level of leisure floorspace at the expense of Class A1 clothing / footwear. Ealing Broadway shopping centre has undergone some refurbishment but has not extended in terms of floorspace / units; and the Arcadia Shopping Centre has been redeveloped and occupied by McDonalds, TK Maxx and Morrison's.

8.14 The quantitative analysis has found the Morrisons store to be the only store in the borough which is under-performing in terms of a floorspace sales density. The town centre M&S is one of the strongest performing foodstores in the borough. West Ealing has the highest convenience goods turnover in the borough (£97.6m), and strong sales performance; Waitrose is the second best performing store in the borough (after Asda, Park Royal), whilst all other stores are performing above expected company averages.

8.15 The analysis found comparison goods floorspace in Ealing Metropolitan Centre to be performing adequately (£9,600 per sq m net), but a stronger, more competitive performance is being held back predominantly by a low proportion of comparison goods operators, including those within the clothing and footwear categories. Sales density/floorspace performance has fallen since the opening of Westfield, from £11,927 per sq m net identified in 2007. Development schemes under construction are insufficient on their own to meet the clear qualitative need for a better range and quality of national multiple retailer, albeit there are clear opportunities to meet this qualitative 'gap' and provide the modern shop (Use Class A1) unit configuration required.

8.16 Ealing has a good supply of development opportunity sites and a significant level of quantitative comparison goods retail 'need' driven by expenditure growth and a strong level of pent up market demand. The Council should proactively facilitate investment and the implementation of planned

development on allocated town centre sites, in order to strengthen the higher order retail offer, diversify the mix of uses and consolidate the Metropolitan Centre status of Ealing. Development opportunities should not be considered in isolation; a key strength of Ealing town centre is the strongly defined physical 'character areas' providing a strong base for growth and change. They present Ealing with a unique character and identity and enable an opportunity to improve shopper movement through an enhanced 'retail circuit'.

8.17 Since previous evidence based studies, further investment is emerging in the network of competing centres, with Brent Cross, Wembley, Westfield, Hounslow and Uxbridge all benefitting from permissions for major extensions and/or town centre redevelopment. At the wider London level, and drawing on comparisons with other Metropolitan Centres, the analysis has shown Ealing to be performing well in the leisure food/beverage categories, but poorly in respect of the level of comparison goods floorspace. This report has identified the necessity for Ealing to facilitate growth whilst consolidating the centre and physical retail circuit in order to ensure a competitive positioning both sub-regionally and London-wide in the future.

Southall Major Centre

8.18 Southall is a vibrant multi-cultural centre, reflected in the strong mix of Asian/ethnic food and non-food operators, high proportion of small independent businesses, and limited range of mainstream comparison and multiple foodstore operators. Nevertheless, both the Lidl and Iceland foodstores are trading well, above company expectations.

8.19 The centre performs a local shopping centre function with 36.3% of respondents visiting at least once a week and 12.3% walking to the town centre. There is also strong evidence of its attraction to a wider catchment, with infrequent visits, longer dwell times and high car usage, likely linked to its reputation as one of the strongest Asian retail destinations in the capital.

8.20 We conclude that the centre, in its current form, is vibrant and healthy, and whilst operator 'churn' is to be expected in some large centres dominated by small businesses, the vacancy rate is low. The market performs a key role in the attraction of the centre, influencing visitor days; and the mix of retailing across the town centre is generally well liked and supported. There is a strong sense of community which was reflected by a number of respondents.

8.21 A key weakness identified is the limited leisure service offer in the form of cafes, restaurants and pubs; less than 6% of visitors were undertaking a 'leisure' activity in the town centre. This might reflect a lack of consumer demand, but any enhancement in this sector will add to the attraction of the centre, extend dwell time, and increase spend.

8.22 In terms of quantitative floorspace performance, Southall Major Centre has a comparison goods turnover of c.£28.0m, improving core zone market share from 5.5% in 2007 to 8.1% in 2017. Based on a net comparison goods floorspace of 14,032 sq m, we estimate that the town centre has a sales density of £1,995 per sq m net; a small increase on the performance recorded in 2007 (£1,637 per sq m net). The level of comparison floorspace in Southall has reduced marginally, and the remaining operators have seemingly improved their efficiency as a consequence.

8.23 In planning for the future, the consumer aspiration for an improved choice, quality and mainstream multiple operator mix should be recognised; whilst maintenance, cleanliness and anti-social behaviour was identified as a key area for improvement by a high proportion of survey respondents. An improved retail and eating/drinking leisure offer is likely to form part of a new retail mix on the Southall Gas Works site, with the current permission including 17,500 sq m A3-A5, alongside 14,200 sq m comparison floorspace and 5,850 sq m convenience goods floorspace.

Acton District Centre

8.24 The performance of Acton town centre is consistent with its defined role as a district centre. It's location close to Central London and Westfield Shopping Centre will continue to restrict a wider, more dominant shopping role but investment and change is ongoing, most notably through the redevelopment of the Oaks Shopping Centre, Crossrail station improvements, the conversion of the Old Town Hall to residential and general operator gentrification. Such investment is responding to the policy aspiration to reinforce and consolidate the centre's district centre status and vibrancy through town centre living.

8.25 The comparison shopping offer is particularly limited, and there is a greater focus on convenience goods shopping centred on Morrisons, but also underpinned by a good range of independent businesses. Morrisons is the key anchor retailer in the town centre and most popular location to park, thereby anchoring the western/central part of the town centre; the store is performing particularly well, substantially above expected company averages. The redevelopment of the Oaks Shopping Centre will improve the comparison goods shopping offer and provide a stronger anchor towards the eastern end of the town centre.

8.26 Acton District Centre has a comparison goods turnover of c.£19.5m, improving core zone market share from 5.1% in 2007 to 7.3% in 2017. Based on a net comparison goods floorspace of 2,898 sq m, we estimate that the town centre has a sales density of £6,740 per sq m net; an increase from the performance recorded in 2007 (£4,366 per sq m net). It should be highlighted that the total turnover has fallen considerably from £30m recorded in 2007, and the sales density has improved as a consequence of a significant reduction in comparison goods floorspace over this ten year period, from 6,884 sq m net to 2,898 sq m net. This might be a consequence of proximity to Westfield, and also national trends moving towards a more 'mixed' town centre environment.

8.27 The analysis has identified a good range of leisure, retail and financial services providing access to everyday goods and products, whilst a strong café culture is assisting in evidence of longer dwell times (2-3 hours) than would perhaps be expected in a district centre. The town centre mix is currently serving a largely local catchment area, with convenience goods, leisure activities and the market underpinning trip purpose and a diverse mix of operator. Moving forwards, visitors would like to experience an improved range and quality of shop, an enhanced environment and a reduction in traffic congestion and consequent improved shopper experience.

Greenford District Centre

8.28 Greenford is a well-established District Centre serving the less urban north-west part of the borough. The centre comprises a busy highways cross section, although The Broadway and Oldfield Lane South have less traffic and wider, pedestrian friendly pavements. The findings demonstrate a centre serving a localised catchment and their everyday retail and service requirements.

8.29 The convenience sector is strong, anchored by a good quality Tesco Metro, new Lidl foodstore and an Iceland, alongside a high number of specialist and independent convenience goods businesses. The Tesco Metro is performing well above expected company averages, and the outputs suggest a qualitative need for a larger town centre foodstore in Greenford. The centre has a good range of banks and health and beauty salons, and offers a Post Office and a selection of opticians and dry cleaners. The vacancy rate is exceptionally low, and the market – whilst in its infancy – offers a (monthly) supplementary retail offer promoting community and local enterprise.

8.30 The comparison retail category is underpinned by household goods and chemists, and the representation of clothing and footwear operators is negligible. Greenford District Centre has a

comparison goods turnover of c.£45.7m – the second largest turnover after Ealing, and an improvement in core zone market share from 10% in 2007 to 19.8% in 2017. Based on a net comparison goods floorspace of 5,464 sq m, we estimate that the town centre has a sales density of £8,363 per sq m net - a considerable increase since that recorded in 2007 (£3,932 per sq m net). This is a strong performance improvement in the context that the level of comparison goods floorspace remains relatively unchanged.

8.31 The café and restaurant offer is particularly limited, and the leisure services category is instead dominated by a high proportion of betting shops and fast food take-aways. Moving forwards, visitors would like to see an improved choice and quality of shop, and it would be beneficial for the centre to consider restricting any further proliferation of betting shops.

Hanwell District Centre

8.32 Hanwell is small in scale, serving a catchment in the centre of the borough, restricted in geography by the location of West Ealing, Southall and Greenford, and open space (Osterley/Brentford) to the south. The centre had become run down and unattractive, but investment and management by the Town Team has started to transform the centre through public realm, shop front, highways and environmental improvements – particularly around the central clock tower. The benefits are primarily focused on Uxbridge Road and Broadway, whilst Boston Road continues to detract from the town centre environment, struggling to perform with frontages dispersed with residential uses and car garages.

8.33 The centre is used as a local top up shopping destination with a high 'walk-in' rate, high frequency of visit and short dwell times. Food shopping is the main attractor, with Lidl performing as a key anchor, and the majority of car borne visitors parking at the store car park. Quantitatively, the Lidl foodstore is performing particularly strongly – well above expected company average levels. The centre has a reasonable mix of retail and service businesses, but this is generally dominated by health and beauty salons and fast food take-aways; there are no banks, opticians or travel agents, and only one small chemist.

8.34 Hanwell District Centre has a comparison goods turnover of c.£9.9m, improving core zone market share from 1.9% in 2007 to 4.9% in 2017. Based on a net comparison goods floorspace of 6,793 sq m, we estimate that the town centre has a sales density of £1,383 per sq m net; marginally higher than that recorded in 2007 (£830 per sq m net). The figures for Hanwell incorporate the large Wickes bulky goods unit, which is inflating the floorspace, and likely deflating the sales performance of the 'town centre' floorspace to some extent. The sales density of shop units could be higher if the Wickes is excluded from the equation.

8.35 Hanwell has a good and improving selection of cafes and restaurants, pubs, independent/specialist stores and a Post Office. There are signs of gentrification. Vacancy rates are low and concentrated off the prime retail pitch on Boston Road. The Gold's gym health club provides a strong attractor in the centre.

Retail Need

Convenience Goods

8.36 The quantitative analysis has identified that all town centre convenience goods floorspace – aside from the Morrisons, Ealing Broadway – is performing strongly, above expected company average levels; this includes the two larger foodstores, Asda at Park Royal and Tesco Hoover Building, which are more akin to major out-of-centre foodstores. This performance is driving a strong quantitative need for additional convenience goods floorspace across the borough, as set out in Table 8.1 and 8.2 below.

8.37 We would recommend against planning for additional convenience goods growth beyond the period to 2027 given continued uncertainties in the market and the need for future study updates in the short-medium terms. Convenience goods commitments at Southall Gas Works and the Oaks Shopping Centre, will absorb c.5,410 sq m of identified need, leaving a residual need across the borough of c.9,400 sq m net by 2027.

Table 8.1: Ealing Borough Quantitative Need: Convenience Goods

2022	2027 Sq m net	2032 Sq m net	2037 Sq m net
13,449	14,784	16,143	17,753

Source: Table 6a, Appendix 1

8.38 'Need by centre', set out in Table 8.2, is based on current market share, and is not necessarily the location in which the level of need should be met. In some cases, for example, a weak performance and low market share leads to negligible identification of need, whereas in reality it is this centre that requires investment to enhance trade retention/market share and overall performance – Southall is a relevant example. We discuss this later in this section.

Table 8.2: Quantitative Need: Convenience Goods by Town Centre

	2022 Sq m net	2027 Sq m net	2032 Sq m net	2037 Sq m net
Ealing	4,735	5,243	5,737	6,345
Southall	-1,912	-1,832	-1,749	-1,656
Acton	1,494	1,649	1,799	1,983
Greenford	1,451	1,597	1,749	1,927
Hanwell	624	673	722	780

NB: Acton need met by new foodstore in The Oaks Shopping Centre.

Comparison Goods

8.39 In respect of comparison goods, our analysis found Ealing Metropolitan Centre to be performing satisfactorily, with comparison goods floorspace in Ealing achieving a sales density of £9,600 per sq m net. We conclude there is considerable opportunity to consolidate and enhance this performance, particularly given previous reporting of a sales density in the region of £11,300 per sq m net in 2007. Table 8.3 identifies borough-wide comparison goods need, and Table 8.4 distributes this by centre.

8.40 Again, for the same reason as for convenience goods, we recommend against planning for development above need in 2027 (7,637 sq m net) given uncertainties in the economy and growing margins of error over longer forecasting periods.

8.41 The figures are, however, based on current market share (baseline), and provided a development was of sufficient quality and critical mass, additional floorspace could be supported in any of the town centres based on an increase in market share. As such, the figures presented in Table 8.4 do not necessarily represent a 'ceiling' to new comparison goods floorspace development.

Table 8.3: Ealing Borough Quantitative Need: Comparison Goods

2022	2027 Sq m net	2032 Sq m net	2037 Sq m net
2,613	7,637	13,054	22,774

Source: Table 6a, Appendix 2

8.42 We previously concluded in Section 7 that the identification of commitments in Southall and Acton should not be viewed as absorbing 'need', but rather strengthening the borough's performance and platform for further additional growth within the network of town centres. In Southall, for example, new floorspace at the gas works will be supported through a consolidated market share, new residential community and claw back of lost trade to competing destinations. The figures do reflect the current scale of each centre, but certainly do not represent a 'ceiling' to new comparison goods floorspace development in central locations.

Table 8.4: Quantitative Need: Comparison Goods by Town Centre

	2022 Sq m net	2027 Sq m net	2032 Sq m net	2037 Sq m net
Ealing	2,002	5,912	10,094	17,632
Southall	249	696	1,181	2,022
Acton	153	442	745	1,294
Greenford	313	946	1,647	2,890
Hanwell	156	298	456	733

Opportunity Sites

8.43 Table 8.5 identifies the range of town centre sites that are allocated in the Development Sites DPD (2013) and are still available for development. We summarise three sites in Acton town centre, one in Greenford, two in Hanwell, and six in Southall, all of which are suitable to enhance the vitality and viability of those centres, and accommodate a proportion of need identified in Table 8.3. A number of sites in Ealing Metropolitan Centre are identified in the Stage 1 Retail Study, and also remain available for development – including the central Arcadia site.

Table 8.5: Town Centre Development Opportunity Sites

Site	Size	Allocation
Acton District Centre		
ACT2 Acton Gateway, Acton	1.30ha	Morrisons site, allocated for mixed use development including retail and residential.
ACT3 Oaks Shopping Centre and Churchfield Road Car Park, Acton	1.2ha	Redevelopment of existing Oaks Shopping Centre, allocated for town centre redevelopment and re-provided retail floorspace.
ACT4 Beechworth House	0.10ha	Redevelopment to include retail floorspace, to enhance the townscape while contributing to the vitality and viability of the town centre by returning the site to full use.
Greenford District Centre		
GRE2 Greenford Crossroads	0.3ha	Mixed use development appropriate to the town centre including retail, office and residential, supported by complementary uses that contribute to the vitality of the town centre.

Hanwell District Centre		
HAN1 64-88 Uxbridge Road	0.15ha	Mixed use development appropriate to the town centre, including provision for community uses.
HAN3 Wickes	0.84ha	Intensify and diversify retail uses to improve the retail offer of the town centre complemented by the introduction of residential use to the site to support the vitality and viability of Hanwell.
Southall Major Centre		
SOU1 Southall Market	1.5ha	Lidl supermarket site and adjoining uses. Allocated for mixed use development appropriate to the town centre, including retention and refurbishment of listed building and provision of a street market.
SOU2 Iceland, Quality Foods and 63-95 South Road	1.23ha	Mixed use development, including provision of a range of retail/commercial unit sizes appropriate to a variety of occupier requirements.
SOU3 Beaconsfield Road/South Road, Southall	3.23ha	Continued education and community use, with introduction of complementary mixed use development appropriate to the town centre including A1/A2/A3, flexible business space and residential.
SOU4 Southall Crossrail Station	4.79ha	Provision of additional development above and around the station
SOU5 Southall West (Gas Works)	37ha	Major mixed-use strategic growth.
SOU8 The Green, Southall	8.3ha	Major mixed-use strategic growth.

Meeting the 'Need'

8.44 The Development (2012) strategy concludes that the greatest development potential is identified to be in Ealing and Southall, as reflected in the number of available opportunity sites set out in Table 8.5 above. We have noted above the importance for Ealing Metropolitan Centre to accommodate new investment in the form of a stronger range and quality of comparison goods retailing, with the clearest opportunity being EAL3 Arcadia site. In order to effectively compete with major retail destinations in the wider sub-region, the Council should aim to facilitate the introduction of 'higher end' comparison goods operators on this site as a key driver for change in the centre.

8.45 Quantitative need in Southall is identified to be only 696 sq m net by 2027, albeit this is based on current performance, market share and existing shopping patterns. The town centre has four key strategic sites to accommodate new and improved comparison goods retailing, including planning for major development already permitted on the Southall Gasworks site – a new addition falling within the allocated town centre boundary. Provided the right type of development comes forward in the form of consolidated critical mass appropriate to the Gas Works site, Southall town centre is in a position to accommodate a higher level of floorspace than baseline need identifies. This would be achieved through new housing, attracting more shoppers and increasing trade draw and turnover.

8.46 In planning for the future, the Development Strategy (2012) confirms that Hanwell will not be a major focus for growth and investment in the borough. We conclude that the Council should not plan for major strategic growth and change, and consistent with the current strategy should focus on retaining and consolidating the centres role as a District Centre. Recent physical enhancements will bring strong benefits to the attraction of the district centre, with wider enhanced vitality as a consequence. Boston

Road is identified as a declining shopping street, with large breaks in the retail frontage, but acts as a key route to the Wickes development opportunity. The strategy moving forwards should be to realise investment on the two key town centre retail opportunity sites, and ensure continued connectivity to primary retail frontages on Uxbridge Road.

8.47 Greenford district centre is not located on the Elizabeth Line, and whilst identified as a focus for growth, the overall quantum of development is expected to be considerably smaller than Acton, Ealing or Southall. Accommodating the baseline need of around 1,000 sq m net to the period 2027 would seem appropriate for the centre, with a focus on delivering the Crossroads site.

8.48 Acton district centre has been impacted upon by its close proximity to Westfield shopping centre, but the completion and opening of the redevelopment of the Oaks Shopping Centre represents substantial investment and confidence in the centre. The introduction of a better quality shopping experience will anchor this eastern part of the town centre, acting as a balance to the Morrisons anchor at the eastern end. There are two further development opportunities in the district centre – one being the Morrisons site. Based on conclusions in respect of foodstores (discussed below), and the strong performance of Morrisons, we recommend any redevelopment proposals retain a foodstore presence to meet the clearly identified demand in this catchment.

8.49 In terms of distributing convenience goods 'need', we recommend floorspace is directed to Greenford and Southall town centres in the first instance. Southall has a small Lidl and Iceland store, both of which are over-trading, and a substantial amount of independent floorspace given the strong ethnic and multi-cultural identity. The independent floorspace serves a clear local need, but we conclude that the catchment would benefit from a more substantial larger, main foodstore. Southall could accommodate additional convenience goods floorspace over and above the commitment on Southall Gas Works - on The Green (SOU8 edge-of-centre), for example - provided further testing was undertaken alongside up-to-date strategic growth in the form of residential development and wider connectivity and linkages throughout the Major Centre.

8.50 Greenford has a small-scale Tesco Metro and Lidl foodstore, with the Tesco Metro being one of the strongest foodstores in the borough in terms of sales density. Again, we recommend seeking opportunity for a larger main foodstore in Greenford town centre, serving a very different catchment to the north west compared to the rest of the borough. The Lidl foodstore in Hanwell is performing well, and the town centre should be considered suitable to accommodate additional convenience goods floorspace over the plan period, in the form of a new foodstore. Elsewhere, Ealing is well provided for, and Acton will benefit from a new foodstore as part of the Oaks Shopping Centre redevelopment – we do not consider it necessary to plan for additional convenience goods floorspace in these two town centres.

Monitoring

8.51 We recommend continued monitoring moving forwards to ensure the Council keep track of the extensive changes due to take place in the Borough. This will enable the most accurate and flexible approach to development control decision and policy formulation over the plan period. These include monitoring completions and proposals both in the Borough and in adjoining boroughs; town centre health; and the change of shopping patterns arising from transformations to the retail and town centre offer, and new development across the identified development opportunity sites.

Appendix 1

Convenience Goods Need

London Borough of Ealing Retail and Town Centres Study 2018

Convenience Goods Need Assessment

Table 1
Survey Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
2017	48,252	37,410	33,310	53,790	48,913	67,191	75,305	50,764	23,156	141,319	94,911	142,323	**816,644**
2022	50,435	39,206	34,801	56,807	51,084	70,184	78,946	51,650	24,703	150,983	102,249	148,124	**859,172**
2027	52,355	40,636	36,052	59,463	52,993	72,581	82,038	52,697	25,869	158,941	109,195	153,375	**896,195**
2032	54,234	41,977	37,260	62,092	54,923	74,510	84,682	54,292	26,818	165,943	115,278	158,681	**930,690**
2037	56,228	43,499	38,577	64,859	56,926	76,950	87,808	55,468	28,039	174,151	122,067	164,134	**968,705**
Change 2017-2037	7,976	6,089	5,267	11,069	8,013	9,759	12,503	4,704	4,883	32,832	27,156	21,811	***152,061***

Source: Experian Micromarketer May 2017

Table 1a
Survey Area Postal Sectors

Zone 1	UB5 4/5/6
Zone 2	UB6 0/7/8
Zone 3	UB1 2; UB6 9
Zone 4	UB1 1/3, UB2 4/5
Zone 5	W13 0/8, W7 1/2/3
Zone 6	W13 9, W5 1/2/3/4/5
Zone 7	W3 0/6/7/8/9; W4 1/5
Zone 8	NW10 6, W12 0/7/8/9
Zone 9	TW8 0/8/9
Zone 10	TW4 5/6/7, TW5 0/9, TW3 1/2/3/4, TW7 4/5/6/7
Zone 11	UB3 1/2/3/4/5, UB4 0/8/9, UB11 1
Zone 12	HA0 1/2/4, HA9 6/7, NW10 0/2/3/4/5/7/8/9

urban shape
PLANNING CONSULTANTS

London Borough of Ealing Retail and Town Centres Study 2018

Convenience Goods Need Assessment

Table 2

Survey Area Retail Expenditure Forecasts (2015 prices) - Convenience Goods

	Expenditure Forecast Per Capita (£)	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
2017	1,861	89.8	69.6	62.0	100.1	91.0	125.0	140.1	94.5	43.1	263.0	176.6	264.9	**1,519.8**
2022	1,824	92.0	71.5	63.5	103.6	93.2	128.0	144.0	94.2	45.0	275.3	186.5	270.1	**1,566.7**
2027	1,819	95.3	73.9	65.6	108.2	96.4	132.1	149.3	95.9	47.1	289.2	198.7	279.0	**1,630.5**
2032	1,821	98.8	76.4	67.8	113.1	100.0	135.7	154.2	98.9	48.8	302.2	209.9	288.9	**1,694.6**
2037	1,826	102.7	79.4	70.4	118.4	104.0	140.5	160.3	101.3	51.2	318.0	222.9	299.7	**1,768.9**
Change 2017-37	**-**	**12.9**	**9.8**	**8.5**	**18.3**	**12.9**	**15.5**	**20.2**	**6.8**	**8.1**	**55.0**	**46.3**	**34.8**	**249.1**

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Convenience Goods Need Assessment

Table 3
Convenience Goods Allocation 2017 - % Market Share

Zone Centre/Store	Policy Allocation	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)
Ealing Metropolitan Centre Stores													
Ealing Broadway													
Morrisons, The Arcadia Centre, The Broadway	Town Centre	0.0%	0.0%	0.0%	0.0%	1.6%	3.9%	3.1%	0.0%	0.4%	0.8%	0.0%	0.2%
M&S Food, Ealing Broadway Centre	Town Centre	0.4%	0.9%	0.3%	0.3%	3.9%	4.7%	0.5%	0.1%	0.7%	0.9%	0.0%	0.0%
Tesco Metro, Ealing Broadway Centre	Town Centre	2.0%	0.0%	0.0%	0.5%	1.1%	8.2%	1.3%	0.0%	0.5%	0.0%	0.4%	0.0%
Sainsbury's Local, The Broadway	Town Centre	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	1.0%
Tesco Express, Haven Green	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Stores, Ealing Broadway	Town Centre	0.0%	1.1%	2.5%	1.8%	0.7%	5.8%	0.2%	0.0%	0.4%	0.0%	0.0%	0.2%
West Ealing													
Sainsbury's Superstore, Melbourne Avenue	Town Centre	0.0%	0.4%	0.9%	0.1%	10.5%	10.2%	0.5%	0.0%	0.7%	0.5%	0.0%	0.0%
Waitrose, Alexandria Road	Town Centre	0.0%	2.7%	1.0%	2.2%	23.2%	17.8%	1.4%	0.2%	2.4%	1.4%	0.0%	0.0%
Lidl, The Broadway	Town Centre	0.0%	0.0%	0.4%	1.7%	1.7%	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Uxbridge Road	Town Centre	0.0%	0.0%	0.0%	3.1%	0.3%	0.3%	0.6%	0.5%	0.0%	0.4%	0.0%	0.0%
Iceland, The Broadway	Town Centre	0.4%	0.0%	0.0%	0.2%	0.1%	0.2%	0.0%	0.2%	0.1%	0.0%	0.1%	0.0%
Local Stores, West Ealing	Town Centre	0.0%	0.0%	0.0%	0.0%	5.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Sub-total, Ealing Metropolitan Centre		**2.8%**	**5.2%**	**5.0%**	**9.8%**	**52.2%**	**51.9%**	**7.9%**	**1.0%**	**5.6%**	**4.1%**	**0.5%**	**1.6%**
Southall Major Centre Market Share %													
Lidl, High Street	Town Centre	0.0%	0.0%	1.9%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, South Road	Town Centre	0.4%	0.0%	1.6%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Stores, Southall Town Centre	Town Centre	0.0%	0.0%	3.8%	7.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.5%	0.0%
Sub-Total, Southal Major Centre		**0.4%**	**0.0%**	**7.4%**	**13.5%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.4%**	**0.5%**	**0.0%**
Hanwell District Centre Market Share %													
Lidl, Uxbridge Road	Town Centre	0.0%	1.0%	0.0%	1.2%	5.9%	2.2%	1.3%	0.5%	5.2%	0.0%	0.0%	0.0%
Nisa, Uxbridge Road	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Stores, Hanwell District Centre	Town Centre	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Sub-Total, Hanwell District Centre		**0.0%**	**1.0%**	**0.0%**	**1.2%**	**6.5%**	**2.2%**	**1.3%**	**0.5%**	**5.3%**	**0.0%**	**0.0%**	**0.0%**
Acton District Centre Market Share %													
Morrisons, King Street	Town Centre	0.0%	0.0%	0.2%	0.0%	0.9%	3.0%	26.6%	5.7%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Local, Churchfield Road	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.3%	0.0%	0.0%	0.0%
Local Stores, Acton District Centre	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.2%	0.0%	0.0%	0.0%	0.0%
Sub-Total, Acton District Centre		**0.0%**	**0.0%**	**0.2%**	**0.0%**	**0.9%**	**3.0%**	**29.4%**	**5.8%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**
Greenford District Centre Market Share %													
Iceland, The Broadway	Town Centre	0.6%	0.7%	2.1%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Ruislip Road	Town Centre	0.0%	2.2%	6.3%	1.5%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Tesco Metro, Greenford Road	Town Centre	1.3%	8.4%	15.5%	0.9%	4.5%	0.3%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%
Local Stores, Greenford District Centre	Town Centre	0.3%	5.3%	5.3%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total, Greenford District Centre		**2.2%**	**16.6%**	**29.2%**	**2.7%**	**5.8%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**	**1.1%**	**0.0%**	**1.4%**

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Convenience Goods Need Assessment

Table 3
Convenience Goods Allocation 2017 - % Market Share

Zone Centre/Store	Policy Allocation	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)
Neighbourhood Centres / Shopping Frontages Market Share %													
Asda, Western Rd, Park Royal Neighbourhood Centre	Town Centre	1.5%	2.6%	4.1%	0.0%	1.3%	0.8%	8.5%	7.8%	0.0%	0.0%	0.0%	28.4%
Tesco Superstore, Hoover Building, Western Ave Shopping Frontage	Town Centre	1.6%	30.5%	7.0%	0.1%	6.0%	2.9%	0.1%	0.3%	0.0%	0.0%	0.0%	0.2%
Iceland, Greenford Road, Sudbury Hill Neighbourhood Centre	Town Centre	0.8%	6.4%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Co-Op, Church Road, Northolt Neighbourhood Centre	Town Centre	6.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Northolt Neighbourhood Centre	Town Centre	1.7%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Pitshanger Lane Neighbourhood Centre	Town Centre	0.0%	1.0%	0.0%	0.0%	3.9%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, South Ealing Neighbourhood Centre	Town Centre	0.0%	0.0%	0.0%	0.3%	0.4%	6.3%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%
Local Shops, East Acton Neighbourhood Centre	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.9%	0.0%	0.0%	0.0%	0.0%
Local Shops, Perivale Neighbourhood Centre	Town Centre	0.0%	3.8%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Westway Cross Neighbourhood Centre	Town Centre	0.0%	0.0%	0.0%	0.0%	2.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, King Street Neighbourhood Centre	Town Centre	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Local Shops, King Street Neighbourhood Centre	Town Centre	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Local Shops, Northfields Neighbourhood Centre	Town Centre	0.0%	0.0%	0.0%	0.0%	0.5%	5.5%	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%
Co-Op, Yeading Lane Shopping Frontage	Town Centre	2.4%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op, Greenford Avenue Shopping Frontage	Town Centre	0.0%	0.0%	0.0%	0.0%	7.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op, Horn Lane Shopping Frontage	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Oldfield Lane North Shopping Frontage	Town Centre	1.3%	4.2%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, The Vale Shopping Frontage	Town Centre	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	6.9%	4.9%	0.0%	3.2%	0.0%	0.0%
Tesco Express, Church Road Shopping Frontage	Town Centre	7.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total, Neighbourhood Centres / Shopping Frontages		**23.6%**	**48.4%**	**13.6%**	**8.8%**	**21.5%**	**21.5%**	**18.5%**	**13.9%**	**3.7%**	**3.2%**	**0.8%**	**29.1%**
Ealing Borough Edge / Out-of-Centre Market Share %													
Tesco Express, Ebbett Court, Nr North Acton Station, Acton	Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	2.9%	0.9%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Local, Horn Lane, Acton	Edge-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	1.6%
Tesco Express, Lady Margaret Road	Edge-of-Centre	0.6%	0.0%	5.5%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total, Edge / Out-of-Centre Market Share		**0.6%**	**0.0%**	**5.5%**	**0.1%**	**0.0%**	**0.3%**	**4.6%**	**0.9%**	**0.0%**	**0.0%**	**0.0%**	**1.6%**
TOTAL Ealing Borough [Town/Edge/Out-of-Centre]		**29.6%**	**71.2%**	**61.0%**	**36.2%**	**86.9%**	**79.2%**	**61.8%**	**22.1%**	**14.9%**	**8.6%**	**1.8%**	**33.7%**
Outside Ealing Borough													
Tesco Extra, Bulls Bridge Industrial Estate, Hayes Road		0.9%	0.0%	1.1%	7.9%	0.3%	0.0%	0.0%	0.3%	0.0%	1.7%	5.7%	0.1%
Iceland, Old Oak Common Lane, East Acton		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	3.5%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Askew Road, Shepherds Bush		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%	0.0%	0.0%	0.0%	0.0%
Waitrose, Shepherds Bush, Westfield		0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.9%	13.7%	0.0%	0.0%	0.0%	0.0%
Morrisons, High Street, Brentford		0.0%	0.0%	0.0%	0.0%	0.5%	0.4%	0.0%	0.0%	37.3%	2.4%	0.0%	0.0%
Asda, Northolt Road, Harrow		6.5%	1.2%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Trident Point, Pinner Road, Harrow		2.5%	0.3%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Northolt Road, Harrow		6.1%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%
Waitrose, Northolt Road, Harrow		4.0%	5.6%	0.0%	0.0%	0.0%	0.7%	0.0%	0.2%	0.0%	0.0%	2.4%	0.0%
M&S, High Road, Chiswick		0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	4.2%	1.7%	1.7%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Essex Place, Chiswick		0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	14.9%	5.6%	8.0%	0.3%	0.0%	0.0%
Asda, The Blenheim Centre, Hounslow		0.0%	1.7%	0.0%	1.3%	0.0%	0.0%	0.2%	0.0%	1.0%	10.5%	0.0%	0.0%
Tesco Extra, Osterley Park, Syon Lane, Isleworth		0.3%	0.0%	0.0%	11.5%	0.9%	5.0%	0.0%	0.2%	17.6%	34.6%	0.0%	0.9%
Asda, Millington Road, Hayes		3.0%	0.6%	1.3%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	24.7%	0.0%
Lidl, Uxbridge Road, Hayes		1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%	0.0%
Sainsbury's Superstore, Lombardy Retail Park		6.0%	0.5%	9.3%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	21.9%	0.0%
Tesco Extra, Grencoe Road, Hayes		11.5%	0.1%	21.7%	18.7%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	11.2%	0.0%
Sainsbury's Superstore, Ealing Road, Alperton, Wembley		1.0%	4.6%	0.3%	0.0%	0.1%	1.9%	0.0%	0.2%	0.0%	0.0%	0.0%	14.6%
Tesco Extra, Great Central Way, Neasden, Wembley		0.5%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.2%	0.0%	1.8%	0.0%	9.8%
Sainsbury's Superstore, Long Drive, South Ruislip		12.0%	3.5%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%
Sub-Total Competing Destinations		**55.8%**	**20.4%**	**34.0%**	**46.6%**	**1.8%**	**10.1%**	**23.7%**	**34.4%**	**65.5%**	**51.4%**	**74.7%**	**27.8%**
TOTAL Ealing Borough and Outside Ealing Borough		**85.4%**	**91.6%**	**95.0%**	**82.8%**	**88.7%**	**89.3%**	**85.5%**	**56.5%**	**80.4%**	**60.1%**	**76.6%**	**61.4%**
Other Destinations		**14.6%**	**8.4%**	**5.0%**	**17.2%**	**11.3%**	**10.7%**	**14.5%**	**43.5%**	**19.6%**	**39.9%**	**23.4%**	**38.6%**

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Convenience Need Assessment

Table 4a
Convenience Goods Allocation 2017 - Spend (£) 2015 Prices

Zone		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total	*Total*
Centre/Store		(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	*(%)*
Total Available Spend - 2017		**89.8**	**69.6**	**62.0**	**100.1**	**91.0**	**125.0**	**140.1**	**94.5**	**43.1**	**263.0**	**176.6**	**264.9**	**1,519.8**	**100.0**
Ealing Metropolitan Centre Trade Draw Zone 1-12 (£m)															
Ealing Broadway															
Morrisons, The Arcadia Centre, The Broadway	Town Centre	0.0	0.0	0.0	0.0	1.5	4.9	4.4	0.0	0.2	2.1	0.0	0.6	**13.7**	**0.9**
M&S Food, Ealing Broadway Centre	Town Centre	0.3	0.6	0.2	0.3	3.6	5.9	0.7	0.1	0.3	2.3	0.0	0.0	**14.3**	**0.9**
Tesco Metro, Ealing Broadway Centre	Town Centre	1.8	0.0	0.0	0.5	1.0	10.3	1.9	0.0	0.2	0.0	0.7	0.0	**16.4**	**1.1**
Sainsbury's Local, The Broadway	Town Centre	0.0	0.0	0.0	0.0	3.7	0.0	0.0	0.0	0.1	0.0	0.0	2.6	**6.4**	**0.4**
Tesco Express, Haven Green	Town Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**0.3**	**0.0**
Local Stores, Ealing Broadway	Town Centre	0.0	0.8	1.6	1.8	0.6	7.3	0.3	0.0	0.2	0.0	0.0	0.5	**13.0**	**0.9**
West Ealing															
Sainsbury's Superstore, Melbourne Avenue	Town Centre	0.0	0.3	0.6	0.1	9.5	12.7	0.7	0.0	0.3	1.4	0.0	0.0	**25.6**	**1.7**
Waitrose, Alexandria Road	Town Centre	0.0	1.9	0.6	2.2	21.1	22.2	1.9	0.2	1.0	3.7	0.0	0.0	**55.0**	**3.6**
Lidl, The Broadway	Town Centre	0.0	0.0	0.2	1.7	1.5	0.2	0.3	0.0	0.0	0.0	0.0	0.0	**3.9**	**0.3**
Tesco Express, Uxbridge Road	Town Centre	0.0	0.0	0.0	3.1	0.3	0.4	0.9	0.5	0.0	1.1	0.0	0.0	**6.3**	**0.4**
Iceland, The Broadway	Town Centre	0.3	0.0	0.0	0.2	0.1	0.2	0.0	0.2	0.0	0.0	0.2	0.0	**1.3**	**0.1**
Local Stores, West Ealing	Town Centre	0.0	0.0	0.0	0.0	4.6	0.5	0.0	0.0	0.0	0.0	0.0	0.5	**5.6**	**0.4**
Sub-total, Ealing Metropolitan Centre		**2.5**	**3.6**	**3.1**	**9.8**	**47.5**	**65.0**	**11.0**	**1.0**	**2.4**	**10.7**	**0.9**	**4.1**	**161.7**	**10.6**
Southall Major Centre Market Share %															
Lidl, High Street	Town Centre	0.0	0.0	1.2	2.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.8**	**0.2**
Iceland, South Road	Town Centre	0.4	0.0	1.0	3.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.1**	**0.3**
Local Stores, Southall Town Centre	Town Centre	0.0	0.0	2.4	7.3	0.0	0.0	0.0	0.0	0.0	0.9	0.9	0.0	**11.5**	**0.8**
Sub-Total, Southal Major Centre		**0.4**	**0.0**	**4.6**	**13.6**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.9**	**0.9**	**0.0**	**20.3**	**1.3**
Hanwell District Centre Market Share %															
Lidl, Uxbridge Road	Town Centre	0.0	0.7	0.0	1.2	5.4	2.7	1.9	0.4	2.2	0.0	0.0	0.0	**14.6**	**1.0**
Nisa, Uxbridge Road	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Local Stores, Hanwell District Centre	Town Centre	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.5**	**0.0**
Sub-Total, Hanwell District Centre		**0.0**	**0.7**	**0.0**	**1.2**	**5.9**	**2.7**	**1.9**	**0.4**	**2.3**	**0.0**	**0.0**	**0.0**	**15.1**	**1.0**
Acton District Centre Market Share %															
Morrisons, King Street	Town Centre	0.0	0.0	0.1	0.0	0.9	3.7	37.3	5.3	0.0	0.0	0.0	0.0	**47.4**	**3.1**
Sainsbury's Local, Churchfield Road	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.1	0.0	0.0	0.0	**2.0**	**0.1**
Local Stores, Acton District Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.1	0.0	0.0	0.0	0.0	**2.2**	**0.1**
Sub-Total, Acton District Centre		**0.0**	**0.0**	**0.1**	**0.0**	**0.9**	**3.7**	**41.2**	**5.5**	**0.1**	**0.0**	**0.0**	**0.0**	**51.5**	**3.4**
Greenford District Centre Market Share %															
Iceland, The Broadway	Town Centre	0.6	0.5	1.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.7**	**0.2**
Lidl, Ruislip Road	Town Centre	0.0	1.5	3.9	1.5	0.8	0.0	0.0	0.0	0.0	0.0	0.0	3.6	**11.4**	**0.7**
Tesco Metro, Greenford Road	Town Centre	1.2	5.8	9.6	0.9	4.1	0.4	0.0	0.0	0.0	2.8	0.0	0.0	**24.8**	**1.6**
Local Stores, Greenford District Centre	Town Centre	0.3	3.7	3.3	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.6**	**0.5**
Sub-Total, Greenford District Centre		**2.0**	**11.5**	**18.1**	**2.7**	**5.3**	**0.4**	**0.0**	**0.0**	**0.0**	**2.8**	**0.0**	**3.6**	**46.4**	**3.1**

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Convenience Need Assessment

Table 4a
Convenience Goods Allocation 2017 - Spend (£) 2015 Prices

Zone		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total	*Total*
Centre/Store		(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	*(%)*
Total Available Spend - 2017		**89.8**	**69.6**	**62.0**	**100.1**	**91.0**	**125.0**	**140.1**	**94.5**	**43.1**	**263.0**	**176.6**	**264.9**	**1,519.8**	**100.0**
Neighbourhood Centres / Shopping Frontages Market Share %															
Asda, Western Rd, Park Royal Neighbourhood Centre	Town Centre	1.3	1.8	2.6	0.0	1.2	1.0	11.9	7.4	0.0	0.0	0.0	75.1	**102.3**	**6.7**
Tesco Superstore, Hoover Building, Western Ave Shopping Frontage	Town Centre	1.4	21.2	4.3	0.1	5.5	3.6	0.2	0.3	0.0	0.0	0.0	0.6	**37.3**	**2.5**
Iceland, Greenford Road, Sudbury Hill Neighbourhood Centre	Town Centre	0.7	4.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	**7.0**	**0.5**
Co-Op, Church Road, Northolt Neighbourhood Centre	Town Centre	5.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.8**	**0.4**
Local Shops, Northolt Neighbourhood Centre	Town Centre	1.5	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**1.6**	**0.1**
Local Shops, Pitshanger Lane Neighbourhood Centre	Town Centre	0.0	0.7	0.0	0.0	3.5	6.6	0.0	0.0	0.0	0.0	0.0	0.0	**10.8**	**0.7**
Local Shops, South Ealing Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.3	0.3	7.9	0.0	0.0	1.3	0.0	0.0	0.0	**9.8**	**0.6**
Local Shops, East Acton Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.8	0.0	0.0	0.0	0.0	**1.4**	**0.1**
Local Shops, Perivale Neighbourhood Centre	Town Centre	0.0	2.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.8**	**0.2**
Local Shops, Westway Cross Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	2.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**2.4**	**0.2**
Tesco Express, King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	4.4	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	**5.6**	**0.4**
Local Shops, King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	**4.0**	**0.3**
Local Shops, Northfields Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.4	6.8	0.1	0.0	0.3	0.0	0.0	0.0	**7.6**	**0.5**
Co-Op, Yeading Lane Shopping Frontage	Town Centre	2.2	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.8**	**0.2**
Co-Op, Greenford Avenue Shopping Frontage	Town Centre	0.0	0.0	0.0	0.0	6.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.4**	**0.4**
Co-Op, Horn Lane Shopping Frontage	Town Centre	0.0	0.0	0.0	0.0	0.0	0.6	3.6	0.0	0.0	0.0	0.0	0.0	**4.1**	**0.3**
Tesco Express, Oldfield Lane North Shopping Frontage	Town Centre	1.1	2.9	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.3**	**0.3**
Tesco Metro, The Vale Shopping Frontage	Town Centre	0.0	0.0	0.2	0.0	0.0	0.0	9.7	4.7	0.0	8.3	0.0	0.0	**22.9**	**1.5**
Tesco Express, Church Road Shopping Frontage	Town Centre	7.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.0**	**0.5**
Sub-Total, Neighbourhood Centres / Shopping Frontages		**21.2**	**33.7**	**8.5**	**8.8**	**19.5**	**26.8**	**26.0**	**13.2**	**1.6**	**8.3**	**1.4**	**77.2**	**246.2**	**16.2**
Ealing Borough Edge / Out-of-Centre Market Share %															
Tesco Express, Ebbett Court, Nr North Acton Station, Acton	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.4	4.1	0.9	0.0	0.0	0.0	0.0	**5.4**	**0.4**
Sainsbury's Local, Horn Lane, Acton	Edge-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	0.0	0.0	4.2	**6.5**	**0.4**
Tesco Express, Lady Margaret Road	Edge-of-Centre	0.5	0.0	3.4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.1**	**0.3**
Sub-Total, Edge / Out-of-Centre Market Share		**0.5**	**0.0**	**3.4**	**0.1**	**0.0**	**0.4**	**6.4**	**0.9**	**0.0**	**0.0**	**0.0**	**4.2**	**16.0**	**1.1**
TOTAL Ealing Borough [Town/Edge/Out-of-Centre]		**26.5**	**49.6**	**37.8**	**36.3**	**79.1**	**99.0**	**86.6**	**20.9**	**6.4**	**22.7**	**3.3**	**89.2**	**557.4**	**36.7**
Outside Ealing Borough															
Tesco Extra, Osterley Park, Syon Lane, Isleworth		0.3	0.0	0.0	11.5	0.9	6.3	0.0	0.2	7.6	91.1	0.0	2.3	**120.1**	**7.9**
Tesco Extra, Grencoe Road, Hayes		10.3	0.1	13.5	18.7	0.0	0.0	0.0	0.9	0.0	0.0	19.9	0.0	**63.3**	**4.2**
Sainsbury's Superstore, Lombardy Retail Park		5.3	0.4	5.8	5.4	0.0	0.0	0.0	0.0	0.0	0.0	38.7	0.0	**55.6**	**3.7**
Asda, Millington Road, Hayes		2.7	0.4	0.8	1.4	0.0	0.0	0.0	0.0	0.0	0.0	43.6	0.0	**48.8**	**3.2**
Sainsbury's Superstore, Ealing Road, Alperton, Wembley		0.9	3.2	0.2	0.0	0.1	2.4	0.0	0.2	0.0	0.0	0.0	38.7	**45.6**	**3.0**
Sainsbury's Superstore, Essex Place, Chiswick		0.0	0.0	0.0	0.0	0.0	1.9	20.8	5.3	3.4	0.7	0.0	0.0	**32.2**	**2.1**
Tesco Extra, Great Central Way, Neasden, Wembley		0.5	0.0	0.0	0.0	0.0	0.2	0.0	0.2	0.0	4.8	0.0	25.9	**31.5**	**2.1**
Asda, The Blenheim Centre, Hounslow		0.0	1.2	0.0	1.3	0.0	0.0	0.3	0.0	0.4	27.7	0.0	0.0	**30.9**	**2.0**
Tesco Extra, Bulls Bridge Industrial Estate, Hayes Road		0.8	0.0	0.7	7.9	0.3	0.0	0.0	0.3	0.0	4.6	10.0	0.4	**25.0**	**1.6**
Morrisons, High Street, Brentford		0.0	0.0	0.0	0.0	0.4	0.5	0.0	0.0	16.1	6.4	0.0	0.0	**23.4**	**1.5**
Sainsbury's Superstore, Long Drive, South Ruislip		10.8	2.4	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.6	0.0	**17.0**	**1.1**
Waitrose, Shepherds Bush, Westfield		0.0	0.0	0.0	0.0	0.0	0.6	1.3	13.0	0.0	0.0	0.0	0.0	**14.8**	**1.0**
Lidl, Uxbridge Road, Hayes		1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.0	0.0	**13.4**	**0.9**
Sainsbury's Superstore, Northolt Road, Harrow		5.4	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3	**13.4**	**0.9**
Waitrose, Northolt Road, Harrow		3.6	3.9	0.0	0.0	0.0	0.8	0.0	0.2	0.0	0.0	4.3	0.0	**12.8**	**0.8**
M&S, High Road, Chiswick		0.0	0.0	0.0	0.4	0.0	0.0	5.8	1.6	0.7	0.0	0.0	0.0	**8.5**	**0.6**
Iceland, Old Oak Common Lane, East Acton		0.0	0.0	0.0	0.0	0.0	0.0	4.5	3.3	0.0	0.0	0.0	0.0	**7.8**	**0.5**
Tesco Express, Askew Road, Shepherds Bush		0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.4	0.0	0.0	0.0	0.0	**7.4**	**0.5**
Asda, Northolt Road, Harrow		5.9	0.8	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	**6.9**	**0.5**
Morrisons, Trident Point, Pinner Road, Harrow		2.2	0.2	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	**2.8**	**0.2**
Sub-Total Competing Destinations		**50.1**	**14.2**	**21.1**	**46.7**	**1.7**	**12.6**	**33.3**	**32.5**	**28.2**	**135.3**	**132.0**	**73.6**	**581.3**	**38.2**
TOTAL Ealing Borough and Outside Ealing Borough		**76.7**	**63.8**	**58.9**	**82.9**	**80.8**	**111.7**	**119.8**	**53.4**	**34.7**	**158.0**	**135.3**	**162.8**	**1,138.7**	**74.9**
Other Destinations		**13.1**	**5.8**	**3.1**	**17.2**	**10.3**	**13.4**	**20.3**	**41.1**	**8.4**	**105.0**	**41.3**	**102.1**	**381.2**	**25.1**

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London Borough of Ealing Retail and Town Centres Study 2018

Convenience Need Assessment

Table 4b

Convenience Goods Allocation 2022 - Spend (£) 2015 Prices

Zone		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	**Total**	***Total***
Centre/Store		(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	**(£m)**	***(%)***
Total Available Spend - 2022		**92.0**	**71.5**	**63.5**	**103.6**	**93.2**	**128.0**	**144.0**	**94.2**	**45.0**	**275.3**	**186.5**	**270.1**	**1,566.7**	**100.0**
Ealing Metropolitan Centre Trade Draw Zone 1-12 (£m)															
Ealing Broadway															
Morrisons, The Arcadia Centre, The Broadway	Town Centre	0.0	0.0	0.0	0.0	1.5	5.0	4.5	0.0	0.2	2.2	0.0	0.6	**14.0**	**0.9**
M&S Food, Ealing Broadway Centre	Town Centre	0.3	0.7	0.2	0.3	3.6	6.0	0.8	0.1	0.3	2.4	0.0	0.0	**14.7**	**0.9**
Tesco Metro, Ealing Broadway Centre	Town Centre	1.9	0.0	0.0	0.5	1.0	10.5	1.9	0.0	0.2	0.0	0.8	0.0	**16.8**	**1.1**
Sainsbury's Local, The Broadway	Town Centre	0.0	0.0	0.0	0.0	3.7	0.0	0.0	0.0	0.1	0.0	0.0	2.7	**6.6**	**0.4**
Tesco Express, Haven Green	Town Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**0.3**	**0.0**
Local Stores, Ealing Broadway	Town Centre	0.0	0.8	1.6	1.8	0.7	7.5	0.3	0.0	0.2	0.0	0.0	0.5	**13.3**	**0.9**
West Ealing															
Sainsbury's Superstore, Melbourne Avenue	Town Centre	0.0	0.3	0.6	0.1	9.8	13.0	0.7	0.0	0.3	1.5	0.0	0.0	**26.3**	**1.7**
Waitrose, Alexandria Road	Town Centre	0.0	2.0	0.6	2.3	21.6	22.8	2.0	0.2	1.1	3.9	0.0	0.0	**56.4**	**3.6**
Lidl, The Broadway	Town Centre	0.0	0.0	0.2	1.7	1.6	0.2	0.3	0.0	0.0	0.0	0.0	0.0	**4.0**	**0.3**
Tesco Express, Uxbridge Road	Town Centre	0.0	0.0	0.0	3.2	0.3	0.4	0.9	0.5	0.0	1.2	0.0	0.0	**6.5**	**0.4**
Iceland, The Broadway	Town Centre	0.3	0.0	0.0	0.2	0.1	0.3	0.0	0.2	0.1	0.0	0.2	0.0	**1.3**	**0.1**
Local Stores, West Ealing	Town Centre	0.0	0.0	0.0	0.0	4.7	0.5	0.0	0.0	0.0	0.0	0.0	0.5	**5.7**	**0.4**
Sub-total, Ealing Metropolitan Centre		**2.5**	**3.7**	**3.2**	**10.2**	**48.7**	**66.5**	**11.3**	**1.0**	**2.5**	**11.2**	**1.0**	**4.2**	**165.9**	**10.6**
Southall Major Centre Market Share %															
Lidl, High Street	Town Centre	0.0	0.0	1.2	2.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.9**	**0.2**
Iceland, South Road	Town Centre	0.4	0.0	1.0	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.3**	**0.3**
Local Stores, Southall Town Centre	Town Centre	0.0	0.0	2.4	7.5	0.0	0.0	0.0	0.0	0.0	1.0	1.0	0.0	**11.9**	**0.8**
Sub-Total, Southal Major Centre		**0.4**	**0.0**	**4.7**	**14.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.0**	**1.0**	**0.0**	**21.0**	**1.3**
Hanwell District Centre Market Share %															
Lidl, Uxbridge Road	Town Centre	0.0	0.7	0.0	1.3	5.5	2.8	1.9	0.4	2.3	0.0	0.0	0.0	**15.0**	**1.0**
Nisa, Uxbridge Road	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Local Stores, Hanwell District Centre	Town Centre	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**0.6**	**0.0**
Sub-Total, Hanwell District Centre		**0.0**	**0.7**	**0.0**	**1.3**	**6.0**	**2.8**	**1.9**	**0.4**	**2.4**	**0.0**	**0.0**	**0.0**	**15.6**	**1.0**
Acton District Centre Market Share %															
Morrisons, King Street	Town Centre	0.0	0.0	0.1	0.0	0.9	3.8	38.4	5.3	0.0	0.0	0.0	0.0	**48.5**	**3.1**
Sainsbury's Local, Churchfield Road	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.1	0.0	0.0	0.0	**2.1**	**0.1**
Local Stores, Acton District Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0.1	0.0	0.0	0.0	0.0	**2.2**	**0.1**
Sub-Total, Acton District Centre		**0.0**	**0.0**	**0.1**	**0.0**	**0.9**	**3.8**	**42.3**	**5.5**	**0.1**	**0.0**	**0.0**	**0.0**	**52.8**	**3.4**
Greenford District Centre Market Share %															
Iceland, The Broadway	Town Centre	0.6	0.5	1.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.7**	**0.2**
Lidl, Ruislip Road	Town Centre	0.0	1.6	4.0	1.6	0.9	0.0	0.0	0.0	0.0	0.0	0.0	3.7	**11.7**	**0.7**
Tesco Metro, Greenford Road	Town Centre	1.2	6.0	9.8	0.9	4.2	0.4	0.0	0.0	0.0	2.9	0.0	0.0	**25.5**	**1.6**
Local Stores, Greenford District Centre	Town Centre	0.3	3.8	3.4	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.8**	**0.5**
Sub-Total, Greenford District Centre		**2.0**	**11.9**	**18.5**	**2.8**	**5.4**	**0.4**	**0.0**	**0.0**	**0.0**	**2.9**	**0.0**	**3.7**	**47.7**	**3.0**

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Convenience Need Assessment

Table 4b

Convenience Goods Allocation 2022 - Spend (£) 2015 Prices

Zone		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total	*Total*
Centre/Store		(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	*(%)*
Total Available Spend - 2022		**92.0**	**71.5**	**63.5**	**103.6**	**93.2**	**128.0**	**144.0**	**94.2**	**45.0**	**275.3**	**186.5**	**270.1**	**1,566.7**	**100.0**
Neighbourhood Centres / Shopping Frontages Market Share %															
Asda, Western Rd, Park Royal Neighbourhood Centre	Town Centre	1.4	1.9	2.6	0.0	1.2	1.0	12.2	7.3	0.0	0.0	0.0	76.6	**104.3**	**6.7**
Tesco Superstore, Hoover Building, Western Ave Shopping Frontage	Town Centre	1.5	21.8	4.4	0.1	5.6	3.7	0.2	0.3	0.0	0.0	0.0	0.6	**38.2**	**2.4**
Iceland, Greenford Road, Sudbury Hill Neighbourhood Centre	Town Centre	0.8	4.5	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	**7.2**	**0.5**
Co-Op, Church Road, Northolt Neighbourhood Centre	Town Centre	6.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.0**	**0.4**
Local Shops, Northolt Neighbourhood Centre	Town Centre	1.5	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**1.7**	**0.1**
Local Shops, Pitshanger Lane Neighbourhood Centre	Town Centre	0.0	0.7	0.0	0.0	3.6	6.8	0.0	0.0	0.0	0.0	0.0	0.0	**11.1**	**0.7**
Local Shops, South Ealing Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.3	0.4	8.1	0.0	0.0	1.4	0.0	0.0	0.0	**10.1**	**0.6**
Local Shops, East Acton Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.8	0.0	0.0	0.0	0.0	**1.4**	**0.1**
Local Shops, Perivale Neighbourhood Centre	Town Centre	0.0	2.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.9**	**0.2**
Local Shops, Westway Cross Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	2.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**2.5**	**0.2**
Tesco Express, King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	4.5	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	**5.9**	**0.4**
Local Shops, King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	**4.2**	**0.3**
Local Shops, Northfields Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.4	7.0	0.1	0.0	0.3	0.0	0.0	0.0	**7.8**	**0.5**
Co-Op, Yeading Lane Shopping Frontage	Town Centre	2.2	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.9**	**0.2**
Co-Op, Greenford Avenue Shopping Frontage	Town Centre	0.0	0.0	0.0	0.0	6.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.6**	**0.4**
Co-Op, Horn Lane Shopping Frontage	Town Centre	0.0	0.0	0.0	0.0	0.0	0.6	3.7	0.0	0.0	0.0	0.0	0.0	**4.2**	**0.3**
Tesco Express, Oldfield Lane North Shopping Frontage	Town Centre	1.2	3.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.4**	**0.3**
Tesco Metro, The Vale Shopping Frontage	Town Centre	0.0	0.0	0.2	0.0	0.0	0.0	10.0	4.7	0.0	8.7	0.0	0.0	**23.5**	**1.5**
Tesco Express, Church Road Shopping Frontage	Town Centre	7.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.2**	**0.5**
Sub-Total, Neighbourhood Centres / Shopping Frontages		**21.7**	**34.6**	**8.7**	**9.1**	**20.0**	**27.5**	**26.7**	**13.1**	**1.7**	**8.7**	**1.5**	**78.7**	**252.0**	**16.1**
Ealing Borough Edge / Out-of-Centre Market Share %															
Tesco Express, Ebbett Court, Nr North Acton Station, Acton	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.4	4.2	0.9	0.0	0.0	0.0	0.0	**5.5**	**0.4**
Sainsbury's Local, Horn Lane, Acton	Edge-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	0.0	0.0	4.3	**6.7**	**0.4**
Tesco Express, Lady Margaret Road	Edge-of-Centre	0.5	0.0	3.5	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.2**	**0.3**
Sub-Total, Edge / Out-of-Centre Market Share		**0.5**	**0.0**	**3.5**	**0.1**	**0.0**	**0.4**	**6.6**	**0.9**	**0.0**	**0.0**	**0.0**	**4.3**	**16.4**	**1.0**
TOTAL Ealing Borough [Town/Edge/Out-of-Centre]		**27.2**	**50.9**	**38.7**	**37.5**	**80.9**	**101.4**	**88.9**	**20.9**	**6.7**	**23.8**	**3.4**	**91.0**	**571.3**	**36.5**
Outside Ealing Borough															
Tesco Extra, Osterley Park, Syon Lane, Isleworth		0.3	0.0	0.0	11.9	0.9	6.5	0.0	0.2	7.9	95.4	0.0	2.4	**125.4**	**8.0**
Tesco Extra, Grencoe Road, Hayes		10.6	0.1	13.8	19.4	0.0	0.0	0.0	0.9	0.0	0.0	21.0	0.0	**65.6**	**4.2**
Sainsbury's Superstore, Lombardy Retail Park		5.5	0.4	5.9	5.6	0.0	0.0	0.0	0.0	0.0	0.0	40.9	0.0	**58.2**	**3.7**
Asda, Millington Road, Hayes		2.7	0.4	0.8	1.4	0.0	0.0	0.0	0.0	0.0	0.0	46.0	0.0	**51.4**	**3.3**
Sainsbury's Superstore, Ealing Road, Alperton, Wembley		0.9	3.3	0.2	0.0	0.1	2.4	0.0	0.2	0.0	0.0	0.0	39.4	**46.6**	**3.0**
Sainsbury's Superstore, Essex Place, Chiswick		0.0	0.0	0.0	0.0	0.0	2.0	21.4	5.2	3.6	0.7	0.0	0.0	**32.9**	**2.1**
Asda, The Blenheim Centre, Hounslow		0.0	1.2	0.0	1.4	0.0	0.0	0.3	0.0	0.4	29.0	0.0	0.0	**32.3**	**2.1**
Tesco Extra, Great Central Way, Neasden, Wembley		0.5	0.0	0.0	0.0	0.0	0.2	0.0	0.2	0.0	5.0	0.0	26.4	**32.3**	**2.1**
Tesco Extra, Bulls Bridge Industrial Estate, Hayes Road		0.8	0.0	0.7	8.2	0.3	0.0	0.0	0.3	0.0	4.8	10.6	0.4	**26.1**	**1.7**
Morrisons, High Street, Brentford		0.0	0.0	0.0	0.0	0.4	0.5	0.0	0.0	16.8	6.7	0.0	0.0	**24.4**	**1.6**
Sainsbury's Superstore, Long Drive, South Ruislip		11.0	2.5	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	0.0	**17.6**	**1.1**
Waitrose, Shepherds Bush, Westfield		0.0	0.0	0.0	0.0	0.0	0.6	1.3	12.9	0.0	0.0	0.0	0.0	**14.8**	**0.9**
Lidl, Uxbridge Road, Hayes		1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.6	0.0	**14.1**	**0.9**
Sainsbury's Superstore, Northolt Road, Harrow		5.6	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.4	**13.7**	**0.9**
Waitrose, Northolt Road, Harrow		3.6	4.0	0.0	0.0	0.0	0.8	0.0	0.2	0.0	0.0	4.5	0.0	**13.2**	**0.8**
M&S, High Road, Chiswick		0.0	0.0	0.0	0.4	0.0	0.0	6.0	1.6	0.7	0.0	0.0	0.0	**8.7**	**0.6**
Iceland, Old Oak Common Lane, East Acton		0.0	0.0	0.0	0.0	0.0	0.0	4.6	3.3	0.0	0.0	0.0	0.0	**8.0**	**0.5**
Tesco Express, Askew Road, Shepherds Bush		0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.4	0.0	0.0	0.0	0.0	**7.4**	**0.5**
Asda, Northolt Road, Harrow		6.0	0.9	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	**7.1**	**0.5**
Morrisons, Trident Point, Pinner Road, Harrow		2.3	0.2	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	**2.9**	**0.2**
Sub-Total Competing Destinations		**51.4**	**14.6**	**21.6**	**48.3**	**1.7**	**12.9**	**34.2**	**32.4**	**29.5**	**141.6**	**139.4**	**75.0**	**602.5**	**38.5**
TOTAL Ealing Borough and Outside Ealing Borough		**78.5**	**65.5**	**60.3**	**85.8**	**82.6**	**114.3**	**123.1**	**53.3**	**36.2**	**165.4**	**142.8**	**166.0**	**1,173.8**	**74.9**
Other Destinations		**13.4**	**6.0**	**3.2**	**17.8**	**10.5**	**13.7**	**20.9**	**40.9**	**8.8**	**109.9**	**43.6**	**104.1**	**392.9**	**25.1**

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Convenience Need Assessment

Table 4c

Convenience Goods Allocation 2027 - Spend (£) 2015 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2027		**95.3**	**73.9**	**65.6**	**108.2**	**96.4**	**132.1**	**149.3**	**95.9**	**47.1**	**289.2**	**198.7**	**279.0**	**1,630.5**	**100.0**
Ealing Metropolitan Centre Trade Draw Zone 1-12 (£m)															
Ealing Broadway															
Morrisons, The Arcadia Centre, The Broadway	Town Centre	0.0	0.0	0.0	0.0	1.6	5.2	4.7	0.0	0.2	2.3	0.0	0.6	**14.6**	**0.9**
M&S Food, Ealing Broadway Centre	Town Centre	0.4	0.7	0.2	0.3	3.8	6.2	0.8	0.1	0.3	2.5	0.0	0.0	**15.3**	**0.9**
Tesco Metro, Ealing Broadway Centre	Town Centre	1.9	0.0	0.0	0.5	1.0	10.8	2.0	0.0	0.3	0.0	0.8	0.0	**17.4**	**1.1**
Sainsbury's Local, The Broadway	Town Centre	0.0	0.0	0.0	0.0	3.9	0.0	0.0	0.0	0.1	0.0	0.0	2.8	**6.8**	**0.4**
Tesco Express, Haven Green	Town Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**0.3**	**0.0**
Local Stores, Ealing Broadway	Town Centre	0.0	0.8	1.7	1.9	0.7	7.7	0.3	0.0	0.2	0.0	0.0	0.5	**13.8**	**0.8**
West Ealing															
Sainsbury's Superstore, Melbourne Avenue	Town Centre	0.0	0.3	0.6	0.1	10.1	13.5	0.7	0.0	0.3	1.6	0.0	0.0	**27.2**	**1.7**
Waitrose, Alexandria Road	Town Centre	0.0	2.0	0.6	2.4	22.4	23.5	2.1	0.2	1.1	4.1	0.0	0.0	**58.4**	**3.6**
Lidl, The Broadway	Town Centre	0.0	0.0	0.2	1.8	1.6	0.2	0.3	0.0	0.0	0.0	0.0	0.0	**4.1**	**0.3**
Tesco Express, Uxbridge Road	Town Centre	0.0	0.0	0.0	3.4	0.3	0.4	0.9	0.5	0.0	1.2	0.0	0.0	**6.8**	**0.4**
Iceland, The Broadway	Town Centre	0.4	0.0	0.0	0.2	0.1	0.3	0.0	0.2	0.1	0.0	0.2	0.0	**1.3**	**0.1**
Local Stores, West Ealing	Town Centre	0.0	0.0	0.0	0.0	4.9	0.6	0.0	0.0	0.0	0.0	0.0	0.5	**5.9**	**0.4**
Sub-total, Ealing Metropolitan Centre		**2.6**	**3.9**	**3.3**	**10.6**	**50.4**	**68.6**	**11.8**	**1.0**	**2.6**	**11.7**	**1.0**	**4.4**	**171.8**	**10.5**
Southall Major Centre Market Share %															
Lidl, High Street	Town Centre	0.0	0.0	1.3	2.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.0**	**0.2**
Iceland, South Road	Town Centre	0.4	0.0	1.1	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.5**	**0.3**
Local Stores, Southall Town Centre	Town Centre	0.0	0.0	2.5	7.9	0.0	0.0	0.0	0.0	0.0	1.0	1.0	0.0	**12.4**	**0.8**
Sub-Total, Southal Major Centre		**0.4**	**0.0**	**4.8**	**14.6**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.0**	**1.0**	**0.0**	**21.9**	**1.3**
Hanwell District Centre Market Share %															
Lidl, Uxbridge Road	Town Centre	0.0	0.7	0.0	1.3	5.7	2.9	2.0	0.4	2.5	0.0	0.0	0.0	**15.6**	**1.0**
Nisa, Uxbridge Road	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Local Stores, Hanwell District Centre	Town Centre	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**0.6**	**0.0**
Sub-Total, Hanwell District Centre		**0.0**	**0.7**	**0.0**	**1.3**	**6.2**	**2.9**	**2.0**	**0.4**	**2.5**	**0.0**	**0.0**	**0.0**	**16.1**	**1.0**
Acton District Centre Market Share %															
Morrisons, King Street	Town Centre	0.0	0.0	0.1	0.0	0.9	3.9	39.8	5.4	0.0	0.0	0.0	0.0	**50.1**	**3.1**
Sainsbury's Local, Churchfield Road	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.1	0.0	0.0	0.0	**2.1**	**0.1**
Local Stores, Acton District Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0.1	0.0	0.0	0.0	0.0	**2.3**	**0.1**
Sub-Total, Acton District Centre		**0.0**	**0.0**	**0.1**	**0.0**	**0.9**	**3.9**	**43.9**	**5.6**	**0.1**	**0.0**	**0.0**	**0.0**	**54.6**	**3.3**
Greenford District Centre Market Share %															
Iceland, The Broadway	Town Centre	0.6	0.5	1.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.8**	**0.2**
Lidl, Ruislip Road	Town Centre	0.0	1.6	4.1	1.6	0.9	0.0	0.0	0.0	0.0	0.0	0.0	3.8	**12.1**	**0.7**
Tesco Metro, Greenford Road	Town Centre	1.2	6.2	10.2	1.0	4.3	0.4	0.0	0.0	0.0	3.1	0.0	0.0	**26.4**	**1.6**
Local Stores, Greenford District Centre	Town Centre	0.3	3.9	3.5	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.1**	**0.5**
Sub-Total, Greenford District Centre		**2.1**	**12.3**	**19.2**	**2.9**	**5.6**	**0.4**	**0.0**	**0.0**	**0.0**	**3.1**	**0.0**	**3.8**	**49.4**	**3.0**

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Convenience Need Assessment

Table 4c

Convenience Goods Allocation 2027 - Spend (£) 2015 Prices

Zone		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	**Total**	***Total***
Centre/Store		(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	**(£m)**	***(%)***
Total Available Spend - 2027		**95.3**	**73.9**	**65.6**	**108.2**	**96.4**	**132.1**	**149.3**	**95.9**	**47.1**	**289.2**	**198.7**	**279.0**	**1,630.5**	**100.0**
Neighbourhood Centres / Shopping Frontages Market Share %															
Asda, Western Rd, Park Royal Neighbourhood Centre	Town Centre	1.4	1.9	2.7	0.0	1.3	1.0	12.7	7.5	0.0	0.0	0.0	79.1	**107.7**	**6.6**
Tesco Superstore, Hoover Building, Western Ave Shopping Frontage	Town Centre	1.5	22.5	4.6	0.2	5.8	3.8	0.2	0.3	0.0	0.0	0.0	0.6	**39.5**	**2.4**
Iceland, Greenford Road, Sudbury Hill Neighbourhood Centre	Town Centre	0.8	4.7	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	**7.4**	**0.5**
Co-Op, Church Road, Northolt Neighbourhood Centre	Town Centre	6.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.2**	**0.4**
Local Shops, Northolt Neighbourhood Centre	Town Centre	1.6	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**1.7**	**0.1**
Local Shops, Pitshanger Lane Neighbourhood Centre	Town Centre	0.0	0.7	0.0	0.0	3.7	7.0	0.0	0.0	0.0	0.0	0.0	0.0	**11.4**	**0.7**
Local Shops, South Ealing Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.3	0.4	8.3	0.0	0.0	1.5	0.0	0.0	0.0	**10.5**	**0.6**
Local Shops, East Acton Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.8	0.0	0.0	0.0	0.0	**1.4**	**0.1**
Local Shops, Perivale Neighbourhood Centre	Town Centre	0.0	2.8	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.0**	**0.2**
Local Shops, Westway Cross Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	2.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**2.6**	**0.2**
Tesco Express, King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	4.7	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	**6.2**	**0.4**
Local Shops, King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	4.2	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	**4.4**	**0.3**
Local Shops, Northfields Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.4	7.2	0.1	0.0	0.3	0.0	0.0	0.0	**8.1**	**0.5**
Co-Op, Yeading Lane Shopping Frontage	Town Centre	2.3	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.0**	**0.2**
Co-Op, Greenford Avenue Shopping Frontage	Town Centre	0.0	0.0	0.0	0.0	6.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.8**	**0.4**
Co-Op, Horn Lane Shopping Frontage	Town Centre	0.0	0.0	0.0	0.0	0.0	0.6	3.8	0.0	0.0	0.0	0.0	0.0	**4.4**	**0.3**
Tesco Express, Oldfield Lane North Shopping Frontage	Town Centre	1.2	3.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.5**	**0.3**
Tesco Metro, The Vale Shopping Frontage	Town Centre	0.0	0.0	0.2	0.0	0.0	0.0	10.4	4.7	0.0	9.1	0.0	0.0	**24.4**	**1.5**
Tesco Express, Church Road Shopping Frontage	Town Centre	7.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.4**	**0.5**
Sub-Total, Neighbourhood Centres / Shopping Frontages		**22.5**	**35.8**	**8.9**	**9.5**	**20.7**	**28.3**	**27.7**	**13.4**	**1.8**	**9.1**	**1.6**	**81.3**	**260.6**	**16.0**
Ealing Borough Edge / Out-of-Centre Market Share %															
Tesco Express, Ebbett Court, Nr North Acton Station, Acton	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.4	4.4	0.9	0.0	0.0	0.0	0.0	**5.7**	**0.4**
Sainsbury's Local, Horn Lane, Acton	Edge-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.0	0.0	0.0	0.0	4.5	**6.9**	**0.4**
Tesco Express, Lady Margaret Road	Edge-of-Centre	0.5	0.0	3.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.3**	**0.3**
Sub-Total, Edge / Out-of-Centre Market Share		**0.5**	**0.0**	**3.6**	**0.2**	**0.0**	**0.4**	**6.8**	**0.9**	**0.0**	**0.0**	**0.0**	**4.5**	**16.9**	**1.0**
TOTAL Ealing Borough [Town/Edge/Out-of-Centre]		**28.2**	**52.6**	**40.0**	**39.2**	**83.8**	**104.6**	**92.2**	**21.2**	**7.0**	**25.0**	**3.7**	**94.0**	**591.4**	**36.3**
Outside Ealing Borough															
Tesco Extra, Osterley Park, Syon Lane, Isleworth		0.3	0.0	0.0	12.4	0.9	6.7	0.0	0.2	8.3	100.2	0.0	2.4	**131.4**	**8.1**
Tesco Extra, Grencoe Road, Hayes		11.0	0.1	14.2	20.2	0.0	0.0	0.0	0.9	0.0	0.0	22.3	0.0	**68.7**	**4.2**
Sainsbury's Superstore, Lombardy Retail Park		5.7	0.4	6.1	5.8	0.0	0.0	0.0	0.0	0.0	0.0	43.5	0.0	**61.5**	**3.8**
Asda, Millington Road, Hayes		2.8	0.4	0.8	1.5	0.0	0.0	0.0	0.0	0.0	0.0	49.0	0.0	**54.6**	**3.4**
Sainsbury's Superstore, Ealing Road, Alperton, Wembley		0.9	3.4	0.2	0.0	0.1	2.5	0.0	0.2	0.0	0.0	0.0	40.7	**48.1**	**3.0**
Sainsbury's Superstore, Essex Place, Chiswick		0.0	0.0	0.0	0.0	0.0	2.0	22.2	5.3	3.8	0.8	0.0	0.0	**34.1**	**2.1**
Asda, The Blenheim Centre, Hounslow		0.0	1.3	0.0	1.4	0.0	0.0	0.3	0.0	0.5	30.4	0.0	0.0	**33.9**	**2.1**
Tesco Extra, Great Central Way, Neasden, Wembley		0.5	0.0	0.0	0.0	0.0	0.2	0.0	0.2	0.0	5.2	0.0	27.3	**33.4**	**2.0**
Tesco Extra, Bulls Bridge Industrial Estate, Hayes Road		0.9	0.0	0.7	8.6	0.3	0.0	0.0	0.3	0.0	5.1	11.3	0.4	**27.5**	**1.7**
Morrisons, High Street, Brentford		0.0	0.0	0.0	0.0	0.4	0.5	0.0	0.0	17.6	7.0	0.0	0.0	**25.5**	**1.6**
Sainsbury's Superstore, Long Drive, South Ruislip		11.4	2.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.1	0.0	**18.3**	**1.1**
Waitrose, Shepherds Bush, Westfield		0.0	0.0	0.0	0.0	0.0	0.6	1.3	13.1	0.0	0.0	0.0	0.0	**15.1**	**0.9**
Lidl, Uxbridge Road, Hayes		1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	13.5	0.0	**15.0**	**0.9**
Sainsbury's Superstore, Northolt Road, Harrow		5.8	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.6	**14.1**	**0.9**
Waitrose, Northolt Road, Harrow		3.8	4.2	0.0	0.0	0.0	0.9	0.0	0.2	0.0	0.0	4.8	0.0	**13.8**	**0.8**
M&S, High Road, Chiswick		0.0	0.0	0.0	0.4	0.0	0.0	6.2	1.6	0.8	0.0	0.0	0.0	**9.0**	**0.6**
Iceland, Old Oak Common Lane, East Acton		0.0	0.0	0.0	0.0	0.0	0.0	4.8	3.4	0.0	0.0	0.0	0.0	**8.2**	**0.5**
Tesco Express, Askew Road, Shepherds Bush		0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.5	0.0	0.0	0.0	0.0	**7.5**	**0.5**
Asda, Northolt Road, Harrow		6.2	0.9	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	**7.3**	**0.5**
Morrisons, Trident Point, Pinner Road, Harrow		2.4	0.2	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	**3.0**	**0.2**
Sub-Total Competing Destinations		**53.2**	**15.1**	**22.3**	**50.4**	**1.8**	**13.4**	**35.4**	**33.0**	**30.8**	**148.7**	**148.5**	**77.5**	**630.1**	**38.6**
TOTAL Ealing Borough and Outside Ealing Borough		**81.4**	**67.7**	**62.3**	**89.6**	**85.5**	**117.9**	**127.6**	**54.2**	**37.9**	**173.7**	**152.2**	**171.5**	**1,221.5**	**74.9**
Other Destinations		**13.9**	**6.2**	**3.3**	**18.6**	**10.9**	**14.1**	**21.6**	**41.7**	**9.2**	**115.5**	**46.5**	**107.6**	**409.0**	**25.1**

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Convenience Need Assessment

Table 4d
Convenience Goods Allocation 2032 - Spend (£) 2015 Prices

Zone		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total	*Total*
Centre/Store		(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	*(%)*
Total Available Spend - 2032		**98.8**	**76.4**	**67.8**	**113.1**	**100.0**	**135.7**	**154.2**	**98.9**	**48.8**	**302.2**	**209.9**	**288.9**	**1,694.6**	**100.0**
Ealing Metropolitan Centre Trade Draw Zone 1-12 (£m)															
Ealing Broadway															
Morrisons, The Arcadia Centre, The Broadway	Town Centre	0.0	0.0	0.0	0.0	1.6	5.3	4.8	0.0	0.2	2.4	0.0	0.6	**15.0**	**0.9**
M&S Food, Ealing Broadway Centre	Town Centre	0.4	0.7	0.2	0.3	3.9	6.4	0.8	0.1	0.4	2.7	0.0	0.0	**15.8**	**0.9**
Tesco Metro, Ealing Broadway Centre	Town Centre	2.0	0.0	0.0	0.5	1.1	11.1	2.1	0.0	0.3	0.0	0.9	0.0	**17.9**	**1.1**
Sainsbury's Local, The Broadway	Town Centre	0.0	0.0	0.0	0.0	4.0	0.0	0.0	0.0	0.1	0.0	0.0	2.9	**7.0**	**0.4**
Tesco Express, Haven Green	Town Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**0.3**	**0.0**
Local Stores, Ealing Broadway	Town Centre	0.0	0.9	1.7	2.0	0.7	7.9	0.3	0.0	0.2	0.0	0.0	0.5	**14.2**	**0.8**
West Ealing															
Sainsbury's Superstore, Melbourne Avenue	Town Centre	0.0	0.3	0.6	0.1	10.5	13.8	0.7	0.0	0.4	1.6	0.0	0.0	**28.1**	**1.7**
Waitrose, Alexandria Road	Town Centre	0.0	2.1	0.6	2.5	23.2	24.1	2.1	0.2	1.2	4.3	0.0	0.0	**60.3**	**3.6**
Lidl, The Broadway	Town Centre	0.0	0.0	0.3	1.9	1.7	0.2	0.3	0.0	0.0	0.0	0.0	0.0	**4.3**	**0.3**
Tesco Express, Uxbridge Road	Town Centre	0.0	0.0	0.0	3.5	0.3	0.4	1.0	0.5	0.0	1.3	0.0	0.0	**7.1**	**0.4**
Iceland, The Broadway	Town Centre	0.4	0.0	0.0	0.2	0.1	0.3	0.0	0.2	0.1	0.0	0.2	0.0	**1.4**	**0.1**
Local Stores, West Ealing	Town Centre	0.0	0.0	0.0	0.0	5.1	0.6	0.0	0.0	0.0	0.0	0.0	0.5	**6.1**	**0.4**
Sub-total, Ealing Metropolitan Centre		**2.7**	**4.0**	**3.4**	**11.1**	**52.2**	**70.5**	**12.1**	**1.0**	**2.7**	**12.3**	**1.1**	**4.5**	**177.7**	**10.5**
Southall Major Centre Market Share %															
Lidl, High Street	Town Centre	0.0	0.0	1.3	2.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.2**	**0.2**
Iceland, South Road	Town Centre	0.4	0.0	1.1	4.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.7**	**0.3**
Local Stores, Southall Town Centre	Town Centre	0.0	0.0	2.6	8.2	0.0	0.0	0.0	0.0	0.0	1.1	1.1	0.0	**12.9**	**0.8**
Sub-Total, Southal Major Centre		**0.4**	**0.0**	**5.0**	**15.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.1**	**1.1**	**0.0**	**22.9**	**1.3**
Hanwell District Centre Market Share %															
Lidl, Uxbridge Road	Town Centre	0.0	0.8	0.0	1.4	5.9	3.0	2.1	0.4	2.5	0.0	0.0	0.0	**16.1**	**1.0**
Nisa, Uxbridge Road	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Local Stores, Hanwell District Centre	Town Centre	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**0.6**	**0.0**
Sub-Total, Hanwell District Centre		**0.0**	**0.8**	**0.0**	**1.4**	**6.5**	**3.0**	**2.1**	**0.4**	**2.6**	**0.0**	**0.0**	**0.0**	**16.7**	**1.0**
Acton District Centre Market Share %															
Morrisons, King Street	Town Centre	0.0	0.0	0.1	0.0	0.9	4.0	41.1	5.6	0.0	0.0	0.0	0.0	**51.8**	**3.1**
Sainsbury's Local, Churchfield Road	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0.0	0.1	0.0	0.0	0.0	**2.2**	**0.1**
Local Stores, Acton District Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.1	0.0	0.0	0.0	0.0	**2.4**	**0.1**
Sub-Total, Acton District Centre		**0.0**	**0.0**	**0.1**	**0.0**	**0.9**	**4.0**	**45.4**	**5.7**	**0.1**	**0.0**	**0.0**	**0.0**	**56.3**	**3.3**
Greenford District Centre Market Share %															
Iceland, The Broadway	Town Centre	0.6	0.5	1.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.9**	**0.2**
Lidl, Ruislip Road	Town Centre	0.0	1.7	4.2	1.7	0.9	0.0	0.0	0.0	0.0	0.0	0.0	4.0	**12.5**	**0.7**
Tesco Metro, Greenford Road	Town Centre	1.3	6.4	10.5	1.0	4.5	0.4	0.0	0.0	0.0	3.2	0.0	0.0	**27.3**	**1.6**
Local Stores, Greenford District Centre	Town Centre	0.3	4.1	3.6	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.4**	**0.5**
Sub-Total, Greenford District Centre		**2.2**	**12.7**	**19.8**	**3.1**	**5.8**	**0.4**	**0.0**	**0.0**	**0.0**	**3.2**	**0.0**	**4.0**	**51.1**	**3.0**

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Table 4d
Convenience Goods Allocation 2032 - Spend (£) 2015 Prices

Zone		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total	*Total*
Centre/Store		(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	*(%)*
Total Available Spend - 2032		**98.8**	**76.4**	**67.8**	**113.1**	**100.0**	**135.7**	**154.2**	**98.9**	**48.8**	**302.2**	**209.9**	**288.9**	**1,694.6**	**100.0**
Neighbourhood Centres / Shopping Frontages Market Share %															
Asda, Western Rd, Park Royal Neighbourhood Centre	Town Centre	1.5	2.0	2.8	0.0	1.3	1.1	13.1	7.7	0.0	0.0	0.0	81.9	**111.4**	**6.6**
Tesco Superstore, Hoover Building, Western Ave Shopping Frontage	Town Centre	1.6	23.3	4.7	0.2	6.0	4.0	0.2	0.3	0.0	0.0	0.0	0.6	**40.9**	**2.4**
Iceland, Greenford Road, Sudbury Hill Neighbourhood Centre	Town Centre	0.8	4.9	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	**7.7**	**0.5**
Co-Op, Church Road, Northolt Neighbourhood Centre	Town Centre	6.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.4**	**0.4**
Local Shops, Northolt Neighbourhood Centre	Town Centre	1.7	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**1.8**	**0.1**
Local Shops, Pitshanger Lane Neighbourhood Centre	Town Centre	0.0	0.8	0.0	0.0	3.9	7.2	0.0	0.0	0.0	0.0	0.0	0.0	**11.8**	**0.7**
Local Shops, South Ealing Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.3	0.4	8.5	0.0	0.0	1.5	0.0	0.0	0.0	**10.8**	**0.6**
Local Shops, East Acton Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.9	0.0	0.0	0.0	0.0	**1.5**	**0.1**
Local Shops, Perivale Neighbourhood Centre	Town Centre	0.0	2.9	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.1**	**0.2**
Local Shops, Westway Cross Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	2.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**2.7**	**0.2**
Tesco Express, King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	4.9	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.0	**6.5**	**0.4**
Local Shops, King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	4.4	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	**4.6**	**0.3**
Local Shops, Northfields Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.5	7.4	0.1	0.0	0.3	0.0	0.0	0.0	**8.3**	**0.5**
Co-Op, Yeading Lane Shopping Frontage	Town Centre	2.4	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.1**	**0.2**
Co-Op, Greenford Avenue Shopping Frontage	Town Centre	0.0	0.0	0.0	0.0	7.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.1**	**0.4**
Co-Op, Horn Lane Shopping Frontage	Town Centre	0.0	0.0	0.0	0.0	0.0	0.6	3.9	0.0	0.0	0.0	0.0	0.0	**4.5**	**0.3**
Tesco Express, Oldfield Lane North Shopping Frontage	Town Centre	1.3	3.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.7**	**0.3**
Tesco Metro, The Vale Shopping Frontage	Town Centre	0.0	0.0	0.2	0.0	0.0	0.0	10.7	4.9	0.0	9.5	0.0	0.0	**25.3**	**1.5**
Tesco Express, Church Road Shopping Frontage	Town Centre	7.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.7**	**0.5**
Sub-Total, Neighbourhood Centres / Shopping Frontages		**23.3**	**37.0**	**9.3**	**9.9**	**21.5**	**29.1**	**28.6**	**13.8**	**1.8**	**9.5**	**1.7**	**84.2**	**269.7**	**15.9**
Ealing Borough Edge / Out-of-Centre Market Share %															
Tesco Express, Ebbett Court, Nr North Acton Station, Acton	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.4	4.5	0.9	0.0	0.0	0.0	0.0	**5.9**	**0.3**
Sainsbury's Local, Horn Lane, Acton	Edge-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.0	0.0	0.0	0.0	4.6	**7.1**	**0.4**
Tesco Express, Lady Margaret Road	Edge-of-Centre	0.6	0.0	3.8	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.5**	**0.3**
Sub-Total, Edge / Out-of-Centre Market Share		**0.6**	**0.0**	**3.8**	**0.2**	**0.0**	**0.4**	**7.1**	**0.9**	**0.0**	**0.0**	**0.0**	**4.6**	**17.5**	**1.0**
TOTAL Ealing Borough [Town/Edge/Out-of-Centre]		**29.2**	**54.4**	**41.4**	**41.0**	**86.9**	**107.4**	**95.2**	**21.9**	**7.3**	**26.1**	**3.9**	**97.3**	**612.0**	**36.1**
Outside Ealing Borough															
Tesco Extra, Osterley Park, Syon Lane, Isleworth		0.3	0.0	0.0	13.0	0.9	6.9	0.0	0.2	8.6	104.7	0.0	2.5	**137.1**	**8.1**
Tesco Extra, Grencoe Road, Hayes		11.4	0.1	14.7	21.2	0.0	0.0	0.0	0.9	0.0	0.0	23.6	0.0	**71.8**	**4.2**
Sainsbury's Superstore, Lombardy Retail Park		5.9	0.4	6.3	6.1	0.0	0.0	0.0	0.0	0.0	0.0	46.0	0.0	**64.7**	**3.8**
Asda, Millington Road, Hayes		2.9	0.4	0.9	1.6	0.0	0.0	0.0	0.0	0.0	0.0	51.8	0.0	**57.6**	**3.4**
Sainsbury's Superstore, Ealing Road, Alperton, Wembley		1.0	3.5	0.2	0.0	0.1	2.6	0.0	0.2	0.0	0.0	0.0	42.2	**49.8**	**2.9**
Asda, The Blenheim Centre, Hounslow		0.0	1.3	0.0	1.5	0.0	0.0	0.3	0.0	0.5	31.8	0.0	0.0	**35.4**	**2.1**
Sainsbury's Superstore, Essex Place, Chiswick		0.0	0.0	0.0	0.0	0.0	2.1	22.9	5.5	3.9	0.8	0.0	0.0	**35.2**	**2.1**
Tesco Extra, Great Central Way, Neasden, Wembley		0.5	0.0	0.0	0.0	0.0	0.2	0.0	0.2	0.0	5.5	0.0	28.3	**34.6**	**2.0**
Tesco Extra, Bulls Bridge Industrial Estate, Hayes Road		0.9	0.0	0.7	8.9	0.3	0.0	0.0	0.3	0.0	5.3	11.9	0.4	**28.8**	**1.7**
Morrisons, High Street, Brentford		0.0	0.0	0.0	0.0	0.5	0.5	0.0	0.0	18.2	7.4	0.0	0.0	**26.5**	**1.6**
Sainsbury's Superstore, Long Drive, South Ruislip		11.8	2.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.3	0.0	**19.0**	**1.1**
Lidl, Uxbridge Road, Hayes		1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	14.2	0.0	**15.8**	**0.9**
Waitrose, Shepherds Bush, Westfield		0.0	0.0	0.0	0.0	0.0	0.6	1.4	13.6	0.0	0.0	0.0	0.0	**15.6**	**0.9**
Sainsbury's Superstore, Northolt Road, Harrow		6.0	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.9	**14.6**	**0.9**
Waitrose, Northolt Road, Harrow		3.9	4.3	0.0	0.0	0.0	0.9	0.0	0.2	0.0	0.0	5.1	0.0	**14.4**	**0.8**
M&S, High Road, Chiswick		0.0	0.0	0.0	0.5	0.0	0.0	6.4	1.6	0.8	0.0	0.0	0.0	**9.3**	**0.6**
Iceland, Old Oak Common Lane, East Acton		0.0	0.0	0.0	0.0	0.0	0.0	4.9	3.5	0.0	0.0	0.0	0.0	**8.4**	**0.5**
Tesco Express, Askew Road, Shepherds Bush		0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.7	0.0	0.0	0.0	0.0	**7.7**	**0.5**
Asda, Northolt Road, Harrow		6.5	0.9	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	**7.6**	**0.4**
Morrisons, Trident Point, Pinner Road, Harrow		2.5	0.2	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	**3.1**	**0.2**
Sub-Total Competing Destinations		**55.1**	**15.6**	**23.1**	**52.7**	**1.8**	**13.7**	**36.6**	**34.0**	**32.0**	**155.4**	**156.9**	**80.2**	**657.2**	**38.8**
TOTAL Ealing Borough and Outside Ealing Borough		**84.3**	**70.0**	**64.4**	**93.6**	**88.7**	**121.2**	**131.9**	**55.9**	**39.3**	**181.5**	**160.8**	**177.5**	**1,269.2**	**74.9**
Other Destinations		**14.4**	**6.4**	**3.4**	**19.4**	**11.3**	**14.5**	**22.3**	**43.0**	**9.6**	**120.7**	**49.1**	**111.4**	**425.5**	**25.1**

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PLANNING CONSULTANTS

Table 4e

Convenience Goods Allocation 2037 - Spend (£) 2015 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2037		**102.7**	**79.4**	**70.4**	**118.4**	**104.0**	**140.5**	**160.3**	**101.3**	**51.2**	**318.0**	**222.9**	**299.7**	**1,768.9**	**100.0**
Ealing Metropolitan Centre Trade Draw Zone 1-12 (£m)															
Ealing Broadway															
Morrisons, The Arcadia Centre, The Broadway	Town Centre	0.0	0.0	0.0	0.0	1.7	5.5	5.0	0.0	0.2	2.5	0.0	0.7	**15.7**	**0.9**
M&S Food, Ealing Broadway Centre	Town Centre	0.4	0.7	0.2	0.3	4.1	6.6	0.9	0.1	0.4	2.8	0.0	0.0	**16.4**	**0.9**
Tesco Metro, Ealing Broadway Centre	Town Centre	2.1	0.0	0.0	0.6	1.1	11.5	2.1	0.0	0.3	0.0	0.9	0.0	**18.6**	**1.1**
Sainsbury's Local, The Broadway	Town Centre	0.0	0.0	0.0	0.0	4.2	0.0	0.0	0.0	0.1	0.0	0.0	3.0	**7.3**	**0.4**
Tesco Express, Haven Green	Town Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**0.3**	**0.0**
Local Stores, Ealing Broadway	Town Centre	0.0	0.9	1.8	2.1	0.7	8.2	0.4	0.0	0.2	0.0	0.0	0.5	**14.8**	**0.8**
West Ealing															
Sainsbury's Superstore, Melbourne Avenue	Town Centre	0.0	0.3	0.6	0.1	10.9	14.3	0.8	0.0	0.4	1.7	0.0	0.0	**29.1**	**1.6**
Waitrose, Alexandria Road	Town Centre	0.0	2.2	0.7	2.6	24.2	25.0	2.2	0.2	1.2	4.5	0.0	0.0	**62.7**	**3.5**
Lidl, The Broadway	Town Centre	0.0	0.0	0.3	2.0	1.8	0.2	0.3	0.0	0.0	0.0	0.0	0.0	**4.5**	**0.3**
Tesco Express, Uxbridge Road	Town Centre	0.0	0.0	0.0	3.7	0.3	0.5	1.0	0.5	0.0	1.4	0.0	0.0	**7.4**	**0.4**
Iceland, The Broadway	Town Centre	0.4	0.0	0.0	0.2	0.1	0.3	0.0	0.2	0.1	0.0	0.2	0.0	**1.5**	**0.1**
Local Stores, West Ealing	Town Centre	0.0	0.0	0.0	0.0	5.3	0.6	0.0	0.0	0.0	0.0	0.0	0.5	**6.4**	**0.4**
Sub-total, Ealing Metropolitan Centre		**2.8**	**4.1**	**3.6**	**11.6**	**54.3**	**73.0**	**12.6**	**1.0**	**2.8**	**12.9**	**1.1**	**4.7**	**184.7**	**10.4**
Southall Major Centre Market Share %															
Lidl, High Street	Town Centre	0.0	0.0	1.4	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.4**	**0.2**
Iceland, South Road	Town Centre	0.4	0.0	1.1	4.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.0**	**0.3**
Local Stores, Southall Town Centre	Town Centre	0.0	0.0	2.7	8.6	0.0	0.0	0.0	0.0	0.0	1.1	1.1	0.0	**13.5**	**0.8**
Sub-Total, Southal Major Centre		**0.4**	**0.0**	**5.2**	**16.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.1**	**1.1**	**0.0**	**23.9**	**1.4**
Hanwell District Centre Market Share %															
Lidl, Uxbridge Road	Town Centre	0.0	0.8	0.0	1.4	6.2	3.1	2.2	0.5	2.7	0.0	0.0	0.0	**16.8**	**0.9**
Nisa, Uxbridge Road	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Local Stores, Hanwell District Centre	Town Centre	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**0.6**	**0.0**
Sub-Total, Hanwell District Centre		**0.0**	**0.8**	**0.0**	**1.4**	**6.7**	**3.1**	**2.2**	**0.5**	**2.7**	**0.0**	**0.0**	**0.0**	**17.4**	**1.0**
Acton District Centre Market Share %															
Morrisons, King Street	Town Centre	0.0	0.0	0.2	0.0	1.0	4.2	42.7	5.7	0.0	0.0	0.0	0.0	**53.7**	**3.0**
Sainsbury's Local, Churchfield Road	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0.0	0.2	0.0	0.0	0.0	**2.3**	**0.1**
Local Stores, Acton District Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.2	0.0	0.0	0.0	0.0	**2.5**	**0.1**
Sub-Total, Acton District Centre		**0.0**	**0.0**	**0.2**	**0.0**	**1.0**	**4.2**	**47.2**	**5.9**	**0.2**	**0.0**	**0.0**	**0.0**	**58.5**	**3.3**
Greenford District Centre Market Share %															
Iceland, The Broadway	Town Centre	0.7	0.5	1.5	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.0**	**0.2**
Lidl, Ruislip Road	Town Centre	0.0	1.7	4.4	1.8	1.0	0.0	0.0	0.0	0.0	0.0	0.0	4.1	**13.0**	**0.7**
Tesco Metro, Greenford Road	Town Centre	1.3	6.7	10.9	1.1	4.6	0.5	0.0	0.0	0.0	3.4	0.0	0.0	**28.5**	**1.6**
Local Stores, Greenford District Centre	Town Centre	0.3	4.2	3.8	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.7**	**0.5**
Sub-Total, Greenford District Centre		**2.3**	**13.2**	**20.6**	**3.2**	**6.0**	**0.5**	**0.0**	**0.0**	**0.0**	**3.4**	**0.0**	**4.1**	**53.2**	**3.0**

London Borough of Ealing Retail and Town Centres Study 2018

Convenience Need Assessment

Table 4e

Convenience Goods Allocation 2037 - Spend (£) 2015 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2037		**102.7**	**79.4**	**70.4**	**118.4**	**104.0**	**140.5**	**160.3**	**101.3**	**51.2**	**318.0**	**222.9**	**299.7**	**1,768.9**	**100.0**
Neighbourhood Centres / Shopping Frontages Market Share %															
Asda, Western Rd, Park Royal Neighbourhood Centre	Town Centre	1.5	2.1	2.9	0.0	1.4	1.1	13.6	7.9	0.0	0.0	0.0	85.0	**115.5**	**6.5**
Tesco Superstore, Hoover Building, Western Ave Shopping Frontage	Town Centre	1.6	24.2	4.9	0.2	6.3	4.1	0.2	0.3	0.0	0.0	0.0	0.7	**42.5**	**2.4**
Iceland, Greenford Road, Sudbury Hill Neighbourhood Centre	Town Centre	0.8	5.1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	**8.0**	**0.5**
Co-Op, Church Road, Northolt Neighbourhood Centre	Town Centre	6.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.7**	**0.4**
Local Shops, Northolt Neighbourhood Centre	Town Centre	1.7	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**1.9**	**0.1**
Local Shops, Pitshanger Lane Neighbourhood Centre	Town Centre	0.0	0.8	0.0	0.0	4.0	7.4	0.0	0.0	0.0	0.0	0.0	0.0	**12.2**	**0.7**
Local Shops, South Ealing Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.3	0.4	8.8	0.0	0.0	1.6	0.0	0.0	0.0	**11.2**	**0.6**
Local Shops, East Acton Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.9	0.0	0.0	0.0	0.0	**1.5**	**0.1**
Local Shops, Perivale Neighbourhood Centre	Town Centre	0.0	3.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.2**	**0.2**
Local Shops, Westway Cross Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	2.5	0.3	0.0	0.0	0.0	0.0	0.0	0.0	**2.8**	**0.2**
Tesco Express, King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	5.2	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.0	**6.8**	**0.4**
Local Shops, King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	4.6	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	**4.8**	**0.3**
Local Shops, Northfields Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.5	7.7	0.1	0.0	0.3	0.0	0.0	0.0	**8.6**	**0.5**
Co-Op, Yeading Lane Shopping Frontage	Town Centre	2.5	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.2**	**0.2**
Co-Op, Greenford Avenue Shopping Frontage	Town Centre	0.0	0.0	0.0	0.0	7.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.3**	**0.4**
Co-Op, Horn Lane Shopping Frontage	Town Centre	0.0	0.0	0.0	0.0	0.0	0.6	4.1	0.0	0.0	0.0	0.0	0.0	**4.7**	**0.3**
Tesco Express, Oldfield Lane North Shopping Frontage	Town Centre	1.3	3.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.9**	**0.3**
Tesco Metro, The Vale Shopping Frontage	Town Centre	0.0	0.0	0.2	0.0	0.0	0.0	11.1	5.0	0.0	10.0	0.0	0.0	**26.4**	**1.5**
Tesco Express, Church Road Shopping Frontage	Town Centre	8.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.0**	**0.5**
Sub-Total, Neighbourhood Centres / Shopping Frontages		**24.2**	**38.5**	**9.6**	**10.4**	**22.3**	**30.1**	**29.7**	**14.1**	**1.9**	**10.0**	**1.8**	**87.3**	**280.2**	**15.8**
Ealing Borough Edge / Out-of-Centre Market Share %															
Tesco Express, Ebbett Court, Nr North Acton Station, Acton	Out-of-	0.0	0.0	0.0	0.0	0.0	0.5	4.7	0.9	0.0	0.0	0.0	0.0	**6.1**	**0.3**
Sainsbury's Local, Horn Lane, Acton	Edge-of-	0.0	0.0	0.0	0.0	0.0	0.0	2.6	0.0	0.0	0.0	0.0	4.8	**7.4**	**0.4**
Tesco Express, Lady Margaret Road	Edge-of-	0.6	0.0	3.9	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.7**	**0.3**
Sub-Total, Edge / Out-of-Centre Market Share		**0.6**	**0.0**	**3.9**	**0.2**	**0.0**	**0.5**	**7.3**	**0.9**	**0.0**	**0.0**	**0.0**	**4.8**	**18.2**	**1.0**
TOTAL Ealing Borough [Town/Edge/Out-of-Centre]		**30.4**	**56.6**	**43.0**	**42.9**	**90.3**	**111.3**	**99.0**	**22.4**	**7.6**	**27.4**	**4.1**	**100.9**	**636.0**	**36.0**
Outside Ealing Borough															
Tesco Extra, Osterley Park, Syon Lane, Isleworth		0.3	0.0	0.0	13.6	1.0	7.1	0.0	0.2	9.0	110.2	0.0	2.6	**144.0**	**8.1**
Tesco Extra, Grencoe Road, Hayes		11.8	0.1	15.3	22.2	0.0	0.0	0.0	0.9	0.0	0.0	25.1	0.0	**75.3**	**4.3**
Sainsbury's Superstore, Lombardy Retail Park		6.1	0.4	6.6	6.4	0.0	0.0	0.0	0.0	0.0	0.0	48.9	0.0	**68.3**	**3.9**
Asda, Millington Road, Hayes		3.1	0.4	0.9	1.7	0.0	0.0	0.0	0.0	0.0	0.0	55.0	0.0	**61.1**	**3.5**
Sainsbury's Superstore, Ealing Road, Alperton, Wembley		1.0	3.7	0.2	0.0	0.1	2.7	0.0	0.2	0.0	0.0	0.0	43.7	**51.7**	**2.9**
Asda, The Blenheim Centre, Hounslow		0.0	1.4	0.0	1.6	0.0	0.0	0.3	0.0	0.5	33.4	0.0	0.0	**37.2**	**2.1**
Sainsbury's Superstore, Essex Place, Chiswick		0.0	0.0	0.0	0.0	0.0	2.2	23.8	5.6	4.1	0.9	0.0	0.0	**36.6**	**2.1**
Tesco Extra, Great Central Way, Neasden, Wembley		0.5	0.0	0.0	0.0	0.0	0.2	0.0	0.2	0.0	5.8	0.0	29.3	**36.0**	**2.0**
Tesco Extra, Bulls Bridge Industrial Estate, Hayes Road		0.9	0.0	0.7	9.4	0.3	0.0	0.0	0.3	0.0	5.6	12.6	0.4	**30.3**	**1.7**
Morrisons, High Street, Brentford		0.0	0.0	0.0	0.0	0.5	0.5	0.0	0.0	19.1	7.7	0.0	0.0	**27.8**	**1.6**
Sainsbury's Superstore, Long Drive, South Ruislip		12.3	2.8	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.6	0.0	**19.9**	**1.1**
Lidl, Uxbridge Road, Hayes		1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.1	0.0	**16.8**	**0.9**
Waitrose, Shepherds Bush, Westfield		0.0	0.0	0.0	0.0	0.0	0.7	1.4	13.9	0.0	0.0	0.0	0.0	**16.0**	**0.9**
Sainsbury's Superstore, Northolt Road, Harrow		6.2	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.1	**15.2**	**0.9**
Waitrose, Northolt Road, Harrow		4.1	4.5	0.0	0.0	0.0	0.9	0.0	0.2	0.0	0.0	5.4	0.0	**15.1**	**0.9**
M&S, High Road, Chiswick		0.0	0.0	0.0	0.5	0.0	0.0	6.7	1.7	0.9	0.0	0.0	0.0	**9.7**	**0.5**
Iceland, Old Oak Common Lane, East Acton		0.0	0.0	0.0	0.0	0.0	0.0	5.1	3.6	0.0	0.0	0.0	0.0	**8.7**	**0.5**
Tesco Express, Askew Road, Shepherds Bush		0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.9	0.0	0.0	0.0	0.0	**7.9**	**0.4**
Asda, Northolt Road, Harrow		6.7	0.9	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	**7.9**	**0.4**
Morrisons, Trident Point, Pinner Road, Harrow		2.6	0.2	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	**3.2**	**0.2**
Sub-Total Competing Destinations		**57.3**	**16.2**	**23.9**	**55.2**	**1.9**	**14.2**	**38.1**	**34.8**	**33.5**	**163.6**	**166.6**	**83.2**	**688.7**	**38.9**
TOTAL Ealing Borough and Outside Ealing Borough		**87.7**	**72.8**	**66.9**	**98.1**	**92.2**	**125.5**	**137.1**	**57.3**	**41.2**	**191.0**	**170.7**	**184.2**	**1,324.7**	**74.9**
Other Destinations		**15.0**	**6.7**	**3.5**	**20.3**	**11.7**	**15.0**	**23.2**	**44.0**	**10.0**	**127.0**	**52.2**	**115.6**	**444.3**	**25.1**

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Convenience Need Assessment

Table 5
Existing Floorspace Benchmark Performance 2017

Zone Centre/Store		Total Net Floorspace (sq m)	Net Conv Ratio (%)	Net Convenience (sq m)	Co Ave Sales (£ per sq m net)	Average Turnover 2017 (£m)	Actual Turnover 2017 (£m)	Inflow (%)	Inflow (£m)	Actual Turnover Inc. Inflow (£m)	Difference from Ave Turnover 2017 (£m)
Ealing Metropolitan Centre											
Ealing Broadway											
Morrisons, The Arcadia Centre, The Broadway	Town Centre	3,200	80%	2,560	11,365	29.1	13.7	0%	0.0	13.7	-15.4
M&S Food, Ealing Broadway Centre	Town Centre	800	95%	760	9,209	7.0	14.3	0%	0.0	14.3	7.3
Tesco Metro, Ealing Broadway Centre	Town Centre	1,858	80%	1,000	13,972	14.0	16.4	0%	0.0	16.4	2.4
Sainsbury's Local, The Broadway	Town Centre	160	95%	152	14,307	2.2	6.4	0%	0.0	6.4	4.2
Tesco Express, Haven Green	Town Centre	142	95%	135	13,972	1.9	0.3	0%	0.0	0.3	-1.6
Local Stores, Ealing Broadway	Town Centre	947	95%	900	3,000	2.7	13.0	0%	0.0	13.0	10.3
Sub-Total Ealing Broadway		**7,107**		**5,507**		**56.8**	**64.1**		**0.0**	**64.1**	**7.2**
West Ealing											
Sainsbury's Superstore, Melbourne Avenue	Town Centre	2,079	80%	1,663	9,774	16.3	25.6	0%	0.0	25.6	9.4
Waitrose, Alexandria Road	Town Centre	2,968	80%	2,374	10,844	25.7	55.0	0%	0.0	55.0	29.2
Lidl, The Broadway	Town Centre	320	95%	304	6,883	2.1	3.9	0%	0.0	3.9	1.8
Tesco Express, Uxbridge Road	Town Centre	160	95%	152	13,972	2.1	6.3	0%	0.0	6.3	4.2
Iceland, The Broadway	Town Centre	535	95%	508	6,769	3.4	1.3	0%	0.0	1.3	-2.2
Local Stores, West Ealing	Town Centre	4,328	95%	4,112	3,000	12.3	5.6	0%	0.0	5.6	-6.7
Sub-Total West Ealing		**10,390**		**9,113**		**62.0**	**97.6**		**0.0**	**97.6**	**35.6**
Sub-total, Ealing Metropolitan Centre		**17,497**		**14,620**	**8,127**	**118.8**	**161.7**		**0.0**	**161.7**	**42.9**
Southall Major Centre Market Share %											
Lidl, High Street	Town Centre	441	95%	419	6,883	2.9	3.8	0%	0.0	3.8	0.9
Iceland, South Road	Town Centre	504	95%	479	6,769	3.2	5.1	0%	0.0	5.1	1.9
Local Stores, Southall Town Centre	Town Centre	11,896	95%	11,301	3,000	33.9	11.5	0%	0.0	11.5	-22.5
Sub-Total, Southal Major Centre		**12,841**		**12,199**	**3,281**	**40.0**	**20.3**		**0.0**	**20.3**	**-19.7**
Hanwell District Centre Market Share %											
Lidl, Uxbridge Road	Town Centre	854	95%	811	6,883	5.6	14.6	0%	0.0	14.6	9.0
Nisa, Uxbridge Road	Town Centre	105	95%	100	6,769	0.7	0.0	0%	0.0	0.0	-0.7
Local Stores, Hanwell District Centre	Town Centre	1,086	95%	1,032	3,000	3.1	0.5	0%	0.0	0.5	-2.6
Sub-Total, Hanwell District Centre		**2,045**		**1,943**	**4,815**	**9.4**	**15.1**		**0.0**	**15.1**	**5.8**
Acton District Centre Market Share %											
Morrisons, King Street	Town Centre	3,143	80%	2,514	11,365	28.6	47.4	0%	0.0	47.4	18.8
Sainsbury's Local, Churchfield Road	Town Centre	140	95%	133	14,307	1.9	2.0	0%	0.0	2.0	0.1
Local Stores, Acton District Centre	Town Centre	2,600	95%	2,470	3,000	7.4	2.2	0%	0.0	2.2	-5.3
Sub-Total, Acton District Centre		**5,883**		**5,117**	**7,404**	**37.9**	**51.5**		**0.0**	**51.5**	**13.6**
Greenford District Centre Market Share %											
Iceland, The Broadway	Town Centre	528	95%	502	6,769	3.4	2.7	0%	0.0	2.7	-0.7
Lidl, Ruislip Road	Town Centre	1,264	80%	1,011	6,883	7.0	11.4	0%	0.0	11.4	4.4
Tesco Metro, Greenford Road	Town Centre	1,161	80%	929	13,972	13.0	24.8	0%	0.0	24.8	11.8
Local Stores, Greenford District Centre	Town Centre	3,469	95%	3,296	3,000	9.9	7.6	0%	0.0	7.6	-2.3
Sub-Total, Greenford District Centre		**6,422**		**5,737**	**5,790**	**33.2**	**46.4**		**0.0**	**46.4**	**13.2**
Main Borough Food Superstores											
Asda, Western Rd, Park Royal Neighbourhood Centre	Town Centre	5,413	70%	3,789	11,428	43.3	102.3	0%	0.0	102.3	59.0
Tesco Superstore, Hoover Building, Western Ave Shopping Frontage	Town Centre	3,471	80%	2,777	10,440	29.0	37.3	0%	0.0	37.3	8.3
TOTAL Major and District Centre and Borough Superstore Floorspace		**53,572**		**46,182**	**6,747**	**311.6**	**434.7**	**0%**	**0.0**	**434.7**	**123.1**

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Table 7a
Ealing Borough-Wide Convenience Goods Need Sq M Net

	EALING BOROUGH-WIDE CONVENIENCE GOODS NEED				
	2017	2022	2027	2032	2037
Total Available Expenditure (£m)	1,519.8	1,566.7	1,630.5	1,694.6	1,768.9
Market Share from Survey Area (%)	26	28	28	28	28
Total Spend (£m)	434.7	445.4	461.0	477.0	495.6
Existing Retail Floorspace (sq.m net)	46,182	46,182	46,182	46,182	46,182
Sales per sqm net £	9,413	6,747	6,781	6,815	6,849
Sales from Existing Floorspace (£m)	434.7	311.6	313.2	314.7	316.3
Residual Spending to support new floorspace (£m)	0.0	133.8	147.8	162.2	179.3
Sales per sq m net in new shops (£)	10,000	9,950	10,000	10,050	10,100
Capacity for new floorspace (sqm net)	**0**	**13,449**	**14,784**	**16,143**	**17,753**

Assumes -0.1% pa growth in sales efficiency 2017-2022 and 0.1% pa growth in sales efficiency 2023-2037

Table 7b
Ealing Metropolitan and Major Centre Centre Convenience Goods Need Sq M Net

	EALING METROPOLITAN CENTRE CONVENIENCE GOODS NEED					SOUTHALL MAJOR CENTRE CONVENIENCE GOODS NEED				
	2017	2022	2027	2032	2037	2017	2022	2027	2032	2037
Total Available Expenditure (£m)	1,519.8	1,566.7	1,630.5	1,694.6	1,768.9	1,519.8	1,566.7	1,630.5	1,694.6	1,768.9
Market Share from Survey Area (%)	11	11	11	10	10	1	1	1	1	1
Total Spend (£m)	161.7	165.9	171.8	177.7	184.7	20.3	21.0	21.9	22.9	23.9
Existing Retail Floorspace (sq.m net)	14,620	14,620	14,620	14,620	14,620	12,199	12,199	12,199	12,199	12,199
Sales per sqm net £	11,060	8,127	8,168	8,209	8,250	1,666	3,281	3,298	3,314	3,331
Sales from Existing Floorspace (£m)	161.7	118.8	119.4	120.0	120.6	20.3	40.0	40.2	40.4	40.6
Residual Spending to support new floorspace (£m)	0.0	47.1	52.4	57.7	64.1	0.0	-19.0	-18.3	-17.6	-16.7
Sales per sq m net in new shops (£)	10,000	9,950	10,000	10,050	10,100	10,000	9,950	10,000	10,050	10,100
Capacity for new floorspace (sqm net)	**0**	**4,735**	**5,243**	**5,737**	**6,345**	**0**	**-1,912**	**-1,832**	**-1,749**	**-1,656**

Assumes -0.1% pa growth in sales efficiency 2017-2022 and 0.1% pa growth in sales efficiency 2023-2037

Table 7c
Ealing District Centre Convenience Goods Need Sq M Net

	ACTON DISTRICT CENTRE CONVENIENCE GOODS NEED					GREENFORD DISTRICT CENTRE CONVENIENCE GOODS					HANWELL DISTRICT CENTRE CONVENIENCE GOODS				
	2017	2022	2027	2032	2037	2017	2022	2027	2032	2037	2017	2022	2027	2032	2037
Total Available Expenditure (£m)	1,519.8	1,566.7	1,630.5	1,694.6	1,768.9	1,519.8	1,566.7	1,630.5	1,694.6	1,768.9	1,519.8	1,566.7	1,630.5	1,694.6	1,768.9
Market Share from Survey Area (%)	3	3	3	3	3	3	3	3	3	3	1	1	1	1	1
Total Spend (£m)	51.5	52.8	54.6	56.3	58.5	46.4	47.7	49.4	51.1	53.2	15.1	15.6	16.1	16.7	17.4
Existing Retail Floorspace (sq.m net)	5,117	5,117	5,117	5,117	5,117	5,737	5,737	5,737	5,737	5,737	1,943	1,943	1,943	1,943	1,943
Sales per sqm net £	10,070	7,404	7,441	7,479	7,516	8,096	5,790	5,819	5,848	5,878	7,798	4,815	4,839	4,864	4,888
Sales from Existing Floorspace (£m)	51.5	37.9	38.1	38.3	38.5	46.4	33.2	33.4	33.6	33.7	15.1	9.4	9.4	9.4	9.5
Residual Spending to support new floorspace (£m)	0.0	14.9	16.5	18.1	20.0	0.0	14.4	16.0	17.6	19.5	0.0	6.2	6.7	7.3	7.9
Sales per sq m net in new shops (£)	10,000	9,950	10,000	10,050	10,100	10,000	9,950	10,000	10,050	10,100	10,000	9,950	10,000	10,050	10,100
Capacity for new floorspace (sqm net)	**0**	**1,494**	**1,649**	**1,799**	**1,983**	**0**	**1,451**	**1,597**	**1,749**	**1,927**	**0**	**624**	**673**	**722**	**780**

Assumes -0.1% pa growth in sales efficiency 2017-2022 and 0.1% pa growth in sales efficiency 2023-2037

Appendix 2

Comparison Goods Need

London Borough of Ealing Retail and Town Centres Study 2018

Comparison Goods Need Assessment

Table 1
Survey Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
2017	48,252	37,410	33,310	53,790	48,913	67,191	75,305	50,764	23,156	141,319	94,911	142,323	**816,644**
2022	50,435	39,206	34,801	56,807	51,084	70,184	78,946	51,650	24,703	150,983	102,249	148,124	**859,172**
2027	52,355	40,636	36,052	59,463	52,993	72,581	82,038	52,697	25,869	158,941	109,195	153,375	**896,195**
2032	54,234	41,977	37,260	62,092	54,923	74,510	84,682	54,292	26,818	165,943	115,278	158,681	**930,690**
2037	56,228	43,499	38,577	64,859	56,926	76,950	87,808	55,468	28,039	174,151	122,067	164,134	**968,705**
Change 2017-2037	7,976	6,089	5,267	11,069	8,013	9,759	12,503	4,704	4,883	32,832	27,156	21,811	***152,061***

Source: Experian Micromarketer May 2017

Table 1a
Survey Area Postal Sectors

Zone 1	UB5 4/5/6
Zone 2	UB6 0/7/8
Zone 3	UB1 2; UB6 9
Zone 4	UB1 1/3, UB2 4/5
Zone 5	W13 0/8, W7 1/2/3
Zone 6	W13 9, W5 1/2/3/4/5
Zone 7	W3 0/6/7/8/9; W4 1/5
Zone 8	NW10 6, W12 0/7/8/9
Zone 9	TW8 0/8/9
Zone 10	TW4 5/6/7, TW5 0/9, TW3 1/2/3/4, TW7 4/5/6/7
Zone 11	UB3 1/2/3/4/5, UB4 0/8/9, UB11 1
Zone 12	HA0 1/2/4, HA9 6/7, NW10 0/2/3/4/5/7/8/9

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London Borough of Ealing Retail and Town Centres Study 2018

Comparison Goods Need Assessment

Table 2

Survey Area Retail Expenditure Forecasts (2015 prices) - Comparison Goods

	Expenditure Forecast Per Capita (£)	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
2017	2,706	130.6	101.2	90.1	145.5	132.3	181.8	203.8	137.4	62.7	382.4	256.8	385.1	**2,209.6**
2022	2,958	149.2	116.0	102.9	168.0	151.1	207.6	233.5	152.8	73.1	446.6	302.4	438.1	**2,541.2**
2027	3,443	180.3	139.9	124.1	204.7	182.5	249.9	282.5	181.4	89.1	547.3	376.0	528.1	**3,085.8**
2032	4,016	217.8	168.6	149.6	249.4	220.6	299.2	340.1	218.0	107.7	666.5	463.0	637.3	**3,737.8**
2037	4,696	264.0	204.3	181.1	304.6	267.3	361.3	412.3	260.5	131.7	817.7	573.2	770.7	**4,548.6**
Change 2017-37	-	**133.5**	**103.0**	**91.0**	**159.0**	**135.0**	**179.5**	**208.6**	**123.1**	**69.0**	**435.4**	**316.4**	**385.6**	**2,339.0**

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Table 3
Comparison Goods Allocation 2017 - % Market Share

Zone Centre/Store	Policy Allocation	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)
Ealing Borough Town Centre Market Share %													
Ealing Metropolitan Centre	Town Centre	10.4%	17.8%	21.7%	13.6%	44.6%	45.4%	15.9%	2.4%	26.7%	3.2%	0.8%	7.8%
Acton District Centre	Town Centre	0.0%	0.3%	0.0%	0.0%	0.0%	0.7%	7.3%	0.3%	0.0%	0.0%	0.7%	0.1%
Hanwell District Centre [inc.Wickes]	Town Centre	0.0%	0.1%	0.1%	0.2%	4.9%	0.4%	0.0%	0.0%	0.2%	0.3%	0.0%	0.1%
Greenford District Centre	Town Centre	4.4%	6.6%	19.8%	0.3%	2.1%	0.5%	0.1%	0.9%	0.1%	0.1%	0.0%	1.9%
Southall Major Centre	Town Centre	0.0%	1.1%	3.5%	8.1%	0.8%	1.0%	0.1%	0.0%	0.1%	0.1%	1.5%	0.0%
East Acton Neighbourhood Centre [inc.Homebase]	Town Centre	0.0%	0.3%	0.1%	0.2%	0.0%	0.2%	1.2%	5.1%	0.3%	0.5%	0.0%	0.4%
South Ealing Neighbourhood Centre [inc.Wickes]	Town Centre	0.0%	0.0%	0.0%	0.0%	0.2%	1.3%	0.0%	0.0%	0.5%	0.1%	0.0%	0.5%
Sudbury Hill Neighbourhood Centre	Town Centre	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northolt Neighbourhood Centre	Town Centre	5.7%	0.2%	0.2%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.5%	0.0%
Westway Cross Neighbourhood Centre, Greenford	Town Centre	1.4%	9.9%	5.1%	1.0%	1.2%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	1.0%
Perivale Neighbourhood Centre	Town Centre	0.1%	3.9%	0.6%	0.0%	0.8%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Park Royal Neighbourhood Centre	Town Centre	0.1%	0.2%	0.0%	0.0%	0.0%	1.1%	4.7%	0.2%	0.0%	0.0%	0.0%	2.9%
Pitshanger Lane Neighbourhood Centre	Town Centre	0.0%	0.1%	0.0%	0.0%	1.7%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northfields Neighbourhood Centre	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%
King Street Neighbourhood Centre	Town Centre	0.0%	0.0%	0.0%	1.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Sub-total, town centres		**22.7%**	**40.6%**	**51.1%**	**23.4%**	**56.4%**	**52.9%**	**29.3%**	**9.1%**	**29.8%**	**4.4%**	**3.5%**	**14.7%**
Ealing Borough Edge/Out-of-Centre Market Share %													
Wickes, Hanger Lane	Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%
Halfords, Hanger Lane	Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
B&Q, Gunnersbury Avenue	Out-of-Centre	0.0%	0.0%	0.1%	0.8%	0.1%	0.9%	1.4%	0.3%	1.1%	0.6%	0.3%	0.1%
B&Q, Western Avenue, Nr Park Royal	Out-of-Centre	0.3%	0.7%	0.2%	0.1%	0.2%	0.6%	0.4%	0.5%	0.0%	0.0%	0.2%	0.7%
Great Western Industrial/Retail Park, Southall	Out-of-Centre	1.0%	0.1%	4.0%	2.6%	0.3%	2.2%	0.2%	0.0%	2.3%	0.2%	2.5%	1.4%
The Sofa and Chair Company, Western Ave, Nr Park Royal	Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total, Edge/Out-of-Centre		**1.4%**	**0.8%**	**4.3%**	**3.6%**	**0.7%**	**3.9%**	**2.1%**	**0.8%**	**3.4%**	**0.9%**	**2.9%**	**2.6%**
TOTAL EALING BOROUGH Market Share %		**24.1%**	**41.3%**	**55.4%**	**27.0%**	**57.1%**	**56.8%**	**31.4%**	**9.9%**	**33.2%**	**5.3%**	**6.4%**	**17.3%**
Destinations Outside Ealing: Market Share %													
Brent Cross Shopping Centre	Out-of-Centre	0.3%	4.5%	0.5%	0.9%	8.4%	2.8%	3.5%	0.6%	0.6%	1.1%	0.8%	15.9%
Westfield/Shepherds Bush	Town Centre	6.4%	7.8%	6.8%	2.7%	10.3%	8.7%	19.5%	43.8%	5.1%	3.2%	1.7%	11.3%
Hounslow	Town Centre	0.1%	1.8%	2.6%	19.2%	0.1%	0.0%	0.8%	0.1%	7.1%	20.5%	1.7%	0.1%
Uxbridge	Town Centre	11.5%	0.9%	3.0%	7.2%	0.8%	0.4%	1.3%	0.8%	0.1%	0.8%	28.5%	0.5%
Hayes	Town Centre	4.0%	5.4%	4.5%	15.3%	0.1%	0.1%	0.0%	0.0%	0.3%	0.5%	27.6%	0.3%
Wembley	Town Centre	2.3%	1.6%	1.9%	1.5%	2.2%	0.9%	0.4%	2.9%	0.0%	0.3%	0.1%	21.0%
London West End	Town Centre	1.9%	2.9%	0.7%	0.6%	6.0%	8.5%	7.6%	14.0%	4.2%	1.0%	3.5%	2.7%
Harrow	Town Centre	18.8%	10.6%	0.5%	0.1%	0.4%	0.0%	0.4%	0.0%	0.0%	0.0%	1.1%	4.6%
Kingston	Town Centre	0.1%	0.0%	0.7%	2.2%	1.6%	0.3%	1.3%	0.1%	8.9%	12.6%	0.3%	0.0%
Staines	Town Centre	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	1.0%	2.1%	0.3%	0.0%
Richmond	Town Centre	0.0%	0.0%	0.0%	1.6%	0.5%	0.1%	1.7%	0.0%	3.0%	15.8%	0.0%	0.0%
Kensington	Town Centre	0.0%	0.1%	0.0%	0.1%	0.0%	0.8%	1.0%	0.7%	0.5%	0.3%	0.0%	0.0%
Chelsea	Town Centre	0.0%	0.0%	0.0%	0.3%	0.0%	0.4%	0.7%	0.9%	0.2%	0.0%	0.0%	0.0%
Chiswick	Town Centre	0.0%	1.7%	0.0%	0.3%	0.3%	1.3%	11.6%	6.2%	5.1%	0.2%	0.0%	0.0%
Hammersmith	Town Centre	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	4.3%	12.3%	0.7%	0.0%	0.0%	0.0%
Brentford	Town Centre	0.0%	0.0%	0.3%	2.6%	0.4%	0.9%	0.1%	0.1%	18.4%	2.8%	0.0%	1.8%
Fulham	Town Centre	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Ruislip	Town Centre	12.2%	4.5%	1.4%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	3.1%	0.1%
Lombardy Retail Park, Hayes	Out-of-Centre	0.2%	0.1%	1.2%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%
B&Q, Glencoe Road, Hayes	Out-of-Centre	0.2%	0.5%	0.9%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
Tesco Extra, Glencoe Road, Hayes	Out-of-Centre	0.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Hayes Bridge Retail Park, Hayes	Out-of-Centre	2.6%	1.1%	6.1%	6.6%	2.0%	0.5%	0.0%	0.0%	0.3%	0.1%	9.4%	0.0%
Kew Retail Park, Richmond	Out-of-Centre	0.0%	0.0%	0.1%	0.8%	1.1%	2.8%	0.2%	0.0%	3.1%	4.7%	0.0%	0.2%
Ikea, Drury Way, North Circular, Wembley	Out-of-Centre	0.0%	1.2%	0.0%	0.4%	1.5%	1.6%	1.9%	2.7%	1.5%	0.1%	0.0%	1.9%
London Designer Outlet, Wembley Park, Wembley	Out-of-Centre	0.1%	0.4%	0.0%	0.0%	0.8%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	2.1%
Sub-Total Competing Destinations		**60.7%**	**45.5%**	**32.1%**	**63.2%**	**36.5%**	**30.2%**	**56.6%**	**85.5%**	**59.9%**	**66.0%**	**85.2%**	**62.5%**
TOTAL Ealing Borough and Destinations Outside Ealing		**84.8%**	**86.8%**	**87.5%**	**90.2%**	**93.5%**	**87.0%**	**88.0%**	**95.4%**	**93.1%**	**71.2%**	**91.6%**	**79.9%**
Other Destinations		**15.2%**	**13.2%**	**12.5%**	**9.8%**	**6.5%**	**13.0%**	**12.0%**	**4.6%**	**6.9%**	**28.8%**	**8.4%**	**20.1%**

London Borough of Ealing Retail and Town Centres Study 2018

Comparison Goods Need Assessment

Table 4a
Comparison Goods Allocation 2017 - Spend (£) 2015 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2017		**130.6**	**101.2**	**90.1**	**145.5**	**132.3**	**181.8**	**203.8**	**137.4**	**62.7**	**382.4**	**256.8**	**385.1**	**2,209.6**	**100.0**
Ealing Borough Trade Draw Zone 1-12 (£m)															
Ealing Metropolitan Centre	Town Centre	13.6	18.0	19.5	19.8	59.1	82.5	32.5	3.2	16.8	12.2	2.1	30.0	**309.2**	**14.0**
Acton District Centre	Town Centre	0.0	0.3	0.0	0.0	0.0	1.2	14.9	0.3	0.0	0.0	1.7	0.2	**18.6**	**0.8**
Hanwell District Centre [inc.Wickes]	Town Centre	0.0	0.1	0.1	0.3	6.4	0.7	0.0	0.0	0.1	1.1	0.0	0.6	**9.4**	**0.4**
Greenford District Centre	Town Centre	5.7	6.7	17.8	0.5	2.8	0.8	0.1	1.2	0.0	0.6	0.0	7.2	**43.4**	**2.0**
Southall Major Centre	Town Centre	0.0	1.1	3.2	11.8	1.1	1.9	0.2	0.0	0.1	0.6	3.9	0.0	**23.8**	**1.1**
East Acton Neighbourhood Centre [inc.Homebase]	Town Centre	0.0	0.3	0.1	0.3	0.0	0.4	2.4	7.0	0.2	1.7	0.0	1.4	**13.9**	**0.6**
South Ealing Neighbourhood Centre [inc.Wickes]	Town Centre	0.1	0.0	0.0	0.0	0.2	2.3	0.0	0.0	0.3	0.6	0.0	1.8	**5.3**	**0.2**
Sudbury Hill Neighbourhood Centre	Town Centre	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.8**	**0.0**
Northolt Neighbourhood Centre	Town Centre	7.4	0.2	0.2	0.0	0.0	0.0	0.1	0.2	0.0	0.0	1.2	0.0	**9.3**	**0.4**
Westway Cross Neighbourhood Centre, Greenford	Town Centre	1.9	10.0	4.6	1.4	1.5	0.2	0.0	0.1	0.0	0.2	0.1	3.8	**23.7**	**1.1**
Perivale Neighbourhood Centre	Town Centre	0.2	3.9	0.5	0.0	1.1	0.6	0.0	0.0	0.0	0.0	0.0	0.7	**7.0**	**0.3**
Park Royal Neighbourhood Centre	Town Centre	0.2	0.2	0.0	0.0	0.1	2.0	9.5	0.3	0.0	0.0	0.0	11.1	**23.4**	**1.1**
Pitshanger Lane Neighbourhood Centre	Town Centre	0.0	0.1	0.0	0.0	2.3	2.8	0.0	0.0	0.0	0.0	0.0	0.0	**5.2**	**0.2**
Northfields Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	1.2	0.0	0.0	0.0	**1.9**	**0.1**
King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	1.9	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.0	**2.4**	**0.1**
Sub-total, Ealing Borough (£m)		**29.6**	**41.1**	**46.1**	**36.0**	**74.8**	**96.2**	**59.7**	**12.5**	**18.7**	**16.8**	**9.1**	**56.7**	**497.3**	**22.5**
		10.3	**15.0**	**5.4**	**3.6**	**5.4**	**9.0**	**12.1**	**60.8**					**92.9**	**4.2**
Ealing Borough Edge/Out-of-Centre Trade Draw Zone 1-12 (£m)															
														141.0	
Wickes, Hanger Lane	Out-of-Centre	0.0	0.0	0.0	0.0	0.1	0.2	0.2	0.0	0.0	0.2	0.0	1.6	**2.3**	**0.1**
Halfords, Hanger Lane	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
B&Q, Gunnersbury Avenue	Out-of-Centre	0.0	0.0	0.1	1.2	0.1	1.7	2.9	0.4	0.7	2.4	0.6	0.2	**10.4**	**0.5**
B&Q, Western Avenue, Nr Park Royal	Out-of-Centre	0.4	0.7	0.2	0.2	0.3	1.1	0.8	0.7	0.0	0.0	0.5	2.8	**7.7**	**0.3**
Great Western Industrial/Retail Park, Southall	Out-of-Centre	1.4	0.1	3.6	3.8	0.5	4.0	0.4	0.0	1.4	0.8	6.3	5.4	**27.7**	**1.3**
The Sofa and Chair Company, Western Ave, Nr Park Royal	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Sub-Total, Edge/Out-of-Centre		**1.9**	**0.8**	**3.9**	**5.3**	**0.9**	**7.1**	**4.3**	**1.1**	**2.1**	**3.4**	**7.5**	**10.0**	**48.1**	**2.2**
									24.0	**84.8**					
TOTAL EALING BOROUGH Trade Draw Zone 1-12 (£m)		**31.5**	**41.8**	**50.0**	**41.3**	**75.7**	**103.2**	**64.0**	**13.6**	**20.8**	**20.2**	**16.6**	**66.7**	**545.4**	**24.7**
								407.5	24.0	84.8	407.5				
Destinations Outside Ealing Borough Trade Draw Zone 1-12 (£m)															
Westfield/Shepherds Bush	Town Centre	8.3	7.9	6.2	3.9	13.6	15.9	39.7	60.1	3.2	12.0	4.5	43.7	**219.0**	**9.9**
Hounslow	Town Centre	0.1	1.8	2.3	27.9	0.1	0.0	1.6	0.2	4.4	78.3	4.3	0.5	**121.7**	**5.5**
Uxbridge	Town Centre	15.0	0.9	2.7	10.4	1.0	0.8	2.6	1.1	0.0	2.9	73.2	1.9	**112.5**	**5.1**
Hayes	Town Centre	5.3	5.5	4.0	22.3	0.1	0.2	0.0	0.0	0.2	1.8	71.0	1.3	**111.6**	**5.1**
Wembley	Town Centre	3.0	1.6	1.7	2.2	2.9	1.6	0.9	4.0	0.0	1.1	0.3	80.7	**100.0**	**4.5**
Brent Cross Shopping Centre	Out-of-Centre	0.4	4.5	0.5	1.3	11.1	5.2	7.1	0.8	0.4	4.2	2.1	61.1	**98.6**	**4.5**
London West End	Town Centre	2.5	2.9	0.7	0.9	7.9	15.5	15.5	19.2	2.6	3.7	8.9	10.4	**90.7**	**4.1**
Richmond	Town Centre	0.0	0.0	0.0	2.3	0.6	0.1	3.5	0.0	1.9	60.3	0.0	0.0	**68.8**	**3.1**
Kingston	Town Centre	0.1	0.0	0.6	3.2	2.1	0.6	2.7	0.1	5.6	48.2	0.8	0.0	**64.1**	**2.9**
Harrow	Town Centre	24.5	10.7	0.5	0.1	0.5	0.0	0.7	0.0	0.0	0.0	2.9	17.6	**57.5**	**2.6**
Hayes Bridge Retail Park, Hayes	Out-of-Centre	3.4	1.1	5.5	9.6	2.6	0.9	0.1	0.0	0.2	0.5	24.2	0.0	**48.0**	**2.2**
Chiswick	Town Centre	0.0	1.7	0.0	0.5	0.4	2.3	23.7	8.5	3.2	0.9	0.0	0.0	**41.3**	**1.9**
Brentford	Town Centre	0.0	0.0	0.2	3.8	0.5	1.6	0.2	0.2	11.5	10.8	0.0	6.8	**35.8**	**1.6**
Ruislip	Town Centre	15.9	4.5	1.3	0.0	0.0	0.0	0.4	0.0	0.0	0.0	8.0	0.4	**30.6**	**1.4**
Kew Retail Park, Richmond	Out-of-Centre	0.0	0.0	0.0	1.2	1.5	5.1	0.4	0.0	1.9	17.9	0.0	0.9	**29.0**	**1.3**
Hammersmith	Town Centre	0.0	0.1	0.0	0.0	0.2	0.0	8.8	17.0	0.4	0.0	0.0	0.0	**26.5**	**1.2**
Ikea, Drury Way, North Circular, Wembley	Out-of-Centre	0.0	1.2	0.0	0.6	2.0	2.9	3.9	3.6	0.9	0.6	0.0	7.2	**22.9**	**1.0**
Lombardy Retail Park, Hayes	Out-of-Centre	0.2	0.1	1.1	0.8	0.1	0.0	0.0	0.0	0.0	0.0	16.1	0.0	**18.5**	**0.8**
London Designer Outlet, Wembley Park, Wembley	Out-of-Centre	0.2	0.4	0.0	0.0	1.1	0.0	0.0	0.3	0.0	0.0	0.0	8.2	**10.2**	**0.5**
Staines	Town Centre	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.6	7.9	0.8	0.0	**9.4**	**0.4**
Kensington	Town Centre	0.0	0.1	0.0	0.1	0.0	1.5	2.1	1.0	0.3	1.0	0.0	0.0	**6.1**	**0.3**
Chelsea	Town Centre	0.0	0.0	0.0	0.5	0.0	0.7	1.4	1.2	0.1	0.0	0.0	0.0	**4.0**	**0.2**
B&Q, Glencoe Road, Hayes	Out-of-Centre	0.2	0.5	0.8	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	**2.4**	**0.1**
Tesco Extra, Glencoe Road, Hayes	Out-of-Centre	0.1	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	**1.9**	**0.1**
Fulham	Town Centre	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	**0.5**	**0.0**
Sub-Total Destinations Outside Ealing Borough		**79.2**	**46.0**	**28.9**	**91.9**	**48.3**	**54.9**	**115.4**	**117.4**	**37.5**	**252.2**	**218.8**	**240.8**	**1,331.4**	**60.3**
TOTAL Ealing Borough and Destinations Outside Ealing Trade Draw Zone 1-12 (£m)		**110.7**	**87.9**	**78.9**	**133.2**	**124.0**	**158.1**	**179.4**	**131.0**	**58.3**	**272.4**	**235.4**	**307.5**	**1,876.9**	**84.9**
Other Destinations		**19.9**	**13.3**	**11.2**	**12.3**	**8.4**	**23.7**	**24.4**	**6.3**	**4.3**	**109.9**	**21.4**	**77.6**	**332.8**	**15.1**

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London Borough of Ealing Retail and Town Centres Study 2018

Comparison Goods Need Assessment

Table 4b

Comparison Goods Allocation 2022 - Spend (£) 2015 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2022		**149.2**	**116.0**	**102.9**	**168.0**	**151.1**	**207.6**	**233.5**	**152.8**	**73.1**	**446.6**	**302.4**	**438.1**	**2,541.2**	**100.0**
Ealing Borough Trade Draw Zone 1-12 (£m)															
Ealing Metropolitan Centre	Town Centre	15.5	20.6	22.3	22.8	67.4	94.2	37.2	3.6	19.5	14.2	2.5	34.1	**354.1**	**13.9**
Acton District Centre	Town Centre	0.0	0.3	0.0	0.0	0.0	1.4	17.0	0.4	0.0	0.0	2.0	0.2	**21.3**	**0.8**
Hanwell District Centre [inc.Wickes]	Town Centre	0.0	0.1	0.1	0.4	7.3	0.8	0.0	0.0	0.2	1.2	0.0	0.6	**10.8**	**0.4**
Greenford District Centre	Town Centre	6.5	7.6	20.4	0.5	3.2	1.0	0.1	1.4	0.0	0.6	0.0	8.2	**49.6**	**2.0**
Southall Major Centre	Town Centre	0.0	1.3	3.6	13.6	1.2	2.2	0.2	0.0	0.1	0.6	4.6	0.0	**27.5**	**1.1**
East Acton Neighbourhood Centre [inc.Homebase]	Town Centre	0.0	0.3	0.1	0.3	0.0	0.5	2.8	7.8	0.2	2.0	0.0	1.6	**15.8**	**0.6**
South Ealing Neighbourhood Centre [inc.Wickes]	Town Centre	0.1	0.0	0.0	0.0	0.2	2.6	0.0	0.0	0.4	0.6	0.0	2.0	**6.0**	**0.2**
Sudbury Hill Neighbourhood Centre	Town Centre	0.7	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.9**	**0.0**
Northolt Neighbourhood Centre	Town Centre	8.5	0.2	0.2	0.0	0.0	0.0	0.1	0.2	0.0	0.0	1.4	0.0	**10.7**	**0.4**
Westway Cross Neighbourhood Centre, Greenford	Town Centre	2.2	11.4	5.3	1.6	1.7	0.3	0.0	0.1	0.0	0.2	0.1	4.3	**27.2**	**1.1**
Perivale Neighbourhood Centre	Town Centre	0.2	4.5	0.6	0.0	1.2	0.7	0.0	0.0	0.0	0.0	0.0	0.8	**8.0**	**0.3**
Park Royal Neighbourhood Centre	Town Centre	0.2	0.3	0.0	0.0	0.1	2.3	10.9	0.4	0.0	0.0	0.0	12.6	**26.7**	**1.1**
Pitshanger Lane Neighbourhood Centre	Town Centre	0.0	0.1	0.0	0.0	2.6	3.2	0.0	0.0	0.0	0.0	0.0	0.0	**5.9**	**0.2**
Northfields Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	1.4	0.0	0.0	0.0	**2.1**	**0.1**
King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	2.2	0.2	0.0	0.0	0.0	0.0	0.0	0.3	0.0	**2.7**	**0.1**
Sub-total, Ealing Borough (£m)		**33.8**	**47.0**	**52.6**	**41.6**	**85.4**	**109.8**	**68.5**	**13.9**	**21.8**	**19.6**	**10.7**	**64.5**	**569.3**	**22.4**
Ealing Borough Edge/Out-of-Centre Trade Draw Zone 1-12 (£m)															
Wickes, Hanger Lane	Out-of-Centre	0.0	0.1	0.0	0.0	0.1	0.3	0.2	0.0	0.0	0.2	0.0	1.8	**2.7**	**0.1**
Halfords, Hanger Lane	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
B&Q, Gunnersbury Avenue	Out-of-Centre	0.0	0.0	0.1	1.4	0.1	1.9	3.3	0.5	0.8	2.8	0.8	0.2	**12.0**	**0.5**
B&Q, Western Avenue, Nr Park Royal	Out-of-Centre	0.5	0.8	0.2	0.2	0.3	1.3	0.9	0.7	0.0	0.0	0.6	3.2	**8.8**	**0.3**
Great Western Industrial/Retail Park, Southall	Out-of-Centre	1.6	0.1	4.1	4.4	0.5	4.6	0.4	0.0	1.7	1.0	7.4	6.2	**31.9**	**1.3**
The Sofa and Chair Company, Western Ave, Nr Park Royal	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Sub-Total, Edge/Out-of-Centre		**2.1**	**0.9**	**4.4**	**6.1**	**1.1**	**8.1**	**4.9**	**1.2**	**2.5**	**4.0**	**8.8**	**11.3**	**55.4**	**2.2**
TOTAL EALING BOROUGH Trade Draw Zone 1-12 (£m)		**36.0**	**47.9**	**57.0**	**47.6**	**86.4**	**117.9**	**73.3**	**15.1**	**24.3**	**23.6**	**19.6**	**75.8**	**624.7**	**24.6**
Destinations Outside Ealing Borough Trade Draw Zone 1-12 (£m)															
Westfield/Shepherds Bush	Town Centre	9.5	9.1	7.0	4.5	15.6	18.1	45.4	66.9	3.7	14.1	5.3	49.7	**248.9**	**9.8**
Hounslow	Town Centre	0.1	2.1	2.6	32.2	0.2	0.0	1.9	0.2	5.2	91.4	5.1	0.6	**141.6**	**5.6**
Uxbridge	Town Centre	17.1	1.0	3.1	12.0	1.1	0.9	3.0	1.2	0.0	3.4	86.2	2.2	**131.3**	**5.2**
Hayes	Town Centre	6.0	6.3	4.6	25.8	0.1	0.2	0.0	0.0	0.2	2.1	83.6	1.5	**130.3**	**5.1**
Wembley	Town Centre	3.4	1.8	1.9	2.5	3.3	1.8	1.0	4.4	0.0	1.3	0.4	91.8	**113.8**	**4.5**
Brent Cross Shopping Centre	Out-of-Centre	0.5	5.2	0.5	1.5	12.6	5.9	8.1	0.9	0.4	4.9	2.5	69.5	**112.5**	**4.4**
London West End	Town Centre	2.9	3.3	0.8	1.0	9.0	17.7	17.7	21.4	3.1	4.3	10.5	11.8	**103.5**	**4.1**
Richmond	Town Centre	0.0	0.0	0.0	2.6	0.7	0.1	4.0	0.0	2.2	70.4	0.0	0.0	**80.2**	**3.2**
Kingston	Town Centre	0.1	0.0	0.7	3.7	2.4	0.7	3.1	0.1	6.5	56.3	0.9	0.0	**74.7**	**2.9**
Harrow	Town Centre	28.0	12.2	0.6	0.1	0.6	0.0	0.8	0.0	0.0	0.0	3.4	20.0	**65.8**	**2.6**
Hayes Bridge Retail Park, Hayes	Out-of-Centre	3.9	1.2	6.3	11.1	2.9	1.0	0.1	0.0	0.2	0.6	28.5	0.0	**55.9**	**2.2**
Chiswick	Town Centre	0.0	1.9	0.0	0.6	0.5	2.7	27.2	9.5	3.7	1.0	0.0	0.0	**47.1**	**1.9**
Brentford	Town Centre	0.0	0.0	0.3	4.4	0.6	1.8	0.2	0.2	13.4	12.6	0.0	7.7	**41.4**	**1.6**
Ruislip	Town Centre	18.2	5.2	1.5	0.0	0.0	0.0	0.5	0.0	0.0	0.0	9.4	0.5	**35.3**	**1.4**
Kew Retail Park, Richmond	Out-of-Centre	0.0	0.0	0.1	1.4	1.7	5.9	0.5	0.0	2.3	20.9	0.0	1.0	**33.6**	**1.3**
Hammersmith	Town Centre	0.0	0.1	0.0	0.0	0.2	0.0	10.1	18.9	0.5	0.0	0.0	0.0	**29.8**	**1.2**
Ikea, Drury Way, North Circular, Wembley	Out-of-Centre	0.0	1.3	0.0	0.7	2.3	3.3	4.4	4.1	1.1	0.6	0.0	8.2	**26.0**	**1.0**
Lombardy Retail Park, Hayes	Out-of-Centre	0.3	0.1	1.3	0.9	0.1	0.0	0.1	0.0	0.0	0.0	19.0	0.0	**21.7**	**0.9**
London Designer Outlet, Wembley Park, Wembley	Out-of-Centre	0.2	0.5	0.0	0.0	1.2	0.0	0.0	0.3	0.0	0.0	0.0	9.3	**11.6**	**0.5**
Staines	Town Centre	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.7	9.2	0.9	0.0	**11.0**	**0.4**
Kensington	Town Centre	0.0	0.1	0.0	0.1	0.0	1.7	2.4	1.1	0.4	1.2	0.0	0.0	**7.0**	**0.3**
Chelsea	Town Centre	0.0	0.0	0.0	0.6	0.0	0.8	1.6	1.4	0.1	0.0	0.0	0.0	**4.6**	**0.2**
B&Q, Glencoe Road, Hayes	Out-of-Centre	0.3	0.6	0.9	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	**2.8**	**0.1**
Tesco Extra, Glencoe Road, Hayes	Out-of-Centre	0.1	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	**2.2**	**0.1**
Fulham	Town Centre	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	**0.5**	**0.0**
Sub-Total Destinations Outside Ealing Borough		**90.5**	**52.7**	**33.0**	**106.1**	**55.1**	**62.6**	**132.2**	**130.6**	**43.8**	**294.5**	**257.7**	**274.0**	**1,533.0**	**60.3**
TOTAL Ealing Borough and Destinations Outside Ealing Trade Draw Zone 1-12 (£m)		**126.5**	**100.7**	**90.1**	**153.8**	**141.5**	**180.5**	**205.6**	**145.7**	**68.0**	**318.2**	**277.2**	**349.9**	**2,157.7**	**84.9**
Other Destinations		**22.7**	**15.3**	**12.8**	**14.3**	**9.5**	**27.0**	**27.9**	**7.0**	**5.0**	**128.4**	**25.2**	**88.3**	**383.5**	**15.1**

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Table 4c
Comparison Goods Allocation 2027 - Spend (£) 2015 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2027		**180.3**	**139.9**	**124.1**	**204.7**	**182.5**	**249.9**	**282.5**	**181.4**	**89.1**	**547.3**	**376.0**	**528.1**	**3,085.8**	**100.0**
Ealing Borough Trade Draw Zone 1-12 (£m)															
Ealing Metropolitan Centre	Town Centre	18.8	24.8	26.9	27.8	81.4	113.5	45.0	4.3	23.8	17.5	3.1	41.1	**428.0**	**13.9**
Acton District Centre	Town Centre	0.0	0.4	0.0	0.0	0.1	1.6	20.6	0.5	0.0	0.0	2.5	0.3	**25.8**	**0.8**
Hanwell District Centre [inc.Wickes]	Town Centre	0.0	0.1	0.2	0.4	8.9	1.0	0.0	0.0	0.2	1.5	0.0	0.8	**13.0**	**0.4**
Greenford District Centre	Town Centre	7.9	9.2	24.5	0.7	3.8	1.2	0.2	1.6	0.1	0.8	0.0	9.9	**59.8**	**1.9**
Southall Major Centre	Town Centre	0.0	1.5	4.4	16.6	1.5	2.6	0.3	0.0	0.1	0.8	5.7	0.0	**33.5**	**1.1**
East Acton Neighbourhood Centre [inc.Homebase]	Town Centre	0.0	0.4	0.1	0.4	0.1	0.5	3.4	9.3	0.3	2.5	0.0	1.9	**18.9**	**0.6**
South Ealing Neighbourhood Centre [inc.Wickes]	Town Centre	0.1	0.1	0.0	0.0	0.3	3.1	0.0	0.0	0.4	0.8	0.0	2.4	**7.3**	**0.2**
Sudbury Hill Neighbourhood Centre	Town Centre	0.8	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**1.1**	**0.0**
Northolt Neighbourhood Centre	Town Centre	10.2	0.2	0.3	0.0	0.0	0.0	0.2	0.3	0.0	0.0	1.8	0.0	**13.0**	**0.4**
Westway Cross Neighbourhood Centre, Greenford	Town Centre	2.6	13.8	6.3	2.0	2.1	0.3	0.0	0.2	0.0	0.2	0.1	5.2	**32.8**	**1.1**
Perivale Neighbourhood Centre	Town Centre	0.3	5.4	0.7	0.0	1.5	0.8	0.0	0.0	0.0	0.0	0.0	1.0	**9.7**	**0.3**
Park Royal Neighbourhood Centre	Town Centre	0.3	0.3	0.0	0.0	0.1	2.7	13.1	0.4	0.0	0.0	0.0	15.2	**32.2**	**1.0**
Pitshanger Lane Neighbourhood Centre	Town Centre	0.0	0.1	0.0	0.0	3.2	3.8	0.0	0.0	0.0	0.0	0.0	0.0	**7.2**	**0.2**
Northfields Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	1.7	0.0	0.0	0.0	**2.6**	**0.1**
King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	2.7	0.3	0.0	0.0	0.0	0.0	0.0	0.3	0.0	**3.3**	**0.1**
Sub-total, Ealing Borough (£m)		**40.9**	**56.8**	**63.5**	**50.6**	**103.1**	**132.2**	**82.8**	**16.6**	**26.6**	**24.1**	**13.4**	**77.8**	**688.2**	**22.3**
Ealing Borough Edge/Out-of-Centre Trade Draw Zone 1-12 (£m)															
Wickes, Hanger Lane	Out-of-Centre	0.0	0.1	0.0	0.0	0.1	0.3	0.3	0.0	0.0	0.2	0.0	2.1	**3.2**	**0.1**
Halfords, Hanger Lane	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
B&Q, Gunnersbury Avenue	Out-of-Centre	0.0	0.0	0.1	1.7	0.2	2.3	4.0	0.6	0.9	3.5	0.9	0.3	**14.6**	**0.5**
B&Q, Western Avenue, Nr Park Royal	Out-of-Centre	0.6	0.9	0.3	0.3	0.4	1.6	1.1	0.9	0.0	0.0	0.8	3.8	**10.6**	**0.3**
Great Western Industrial/Retail Park, Southall	Out-of-Centre	1.9	0.1	5.0	5.4	0.6	5.5	0.5	0.0	2.0	1.2	9.3	7.4	**38.9**	**1.3**
The Sofa and Chair Company, Western Ave, Nr Park Royal	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Sub-Total, Edge/Out-of-Centre		**2.6**	**1.1**	**5.3**	**7.4**	**1.3**	**9.7**	**5.9**	**1.4**	**3.0**	**4.9**	**11.0**	**13.7**	**67.3**	**2.2**
TOTAL EALING BOROUGH Trade Draw Zone 1-12 (£m)		**43.5**	**57.8**	**68.8**	**58.0**	**104.4**	**141.9**	**88.7**	**18.0**	**29.6**	**29.0**	**24.3**	**91.4**	**755.4**	**24.5**
Destinations Outside Ealing Borough Trade Draw Zone 1-12 (£m)															
Westfield/Shepherds Bush	Town Centre	11.5	10.9	8.5	5.5	18.8	21.8	55.0	79.5	4.5	17.2	6.6	59.9	**299.6**	**9.7**
Hounslow	Town Centre	0.1	2.6	3.2	39.2	0.2	0.0	2.2	0.3	6.3	112.1	6.4	0.8	**173.3**	**5.6**
Uxbridge	Town Centre	20.6	1.3	3.7	14.7	1.4	1.0	3.6	1.4	0.1	4.1	107.2	2.6	**161.7**	**5.2**
Hayes	Town Centre	7.3	7.6	5.6	31.4	0.1	0.3	0.0	0.0	0.2	2.5	103.9	1.8	**160.7**	**5.2**
Wembley	Town Centre	4.1	2.2	2.3	3.1	4.0	2.2	1.3	5.2	0.0	1.6	0.4	110.7	**137.1**	**4.4**
Brent Cross Shopping Centre	Out-of-Centre	0.6	6.2	0.7	1.8	15.3	7.1	9.8	1.0	0.5	6.0	3.1	83.8	**135.9**	**4.4**
London West End	Town Centre	3.5	4.0	0.9	1.2	10.9	21.3	21.5	25.4	3.8	5.3	13.1	14.2	**125.0**	**4.1**
Richmond	Town Centre	0.0	0.0	0.0	3.2	0.9	0.2	4.9	0.0	2.7	86.3	0.0	0.0	**98.1**	**3.2**
Kingston	Town Centre	0.1	0.1	0.9	4.6	2.9	0.9	3.7	0.2	7.9	69.0	1.1	0.0	**91.3**	**3.0**
Harrow	Town Centre	33.9	14.8	0.7	0.2	0.7	0.0	1.0	0.0	0.0	0.0	4.2	24.2	**79.5**	**2.6**
Hayes Bridge Retail Park, Hayes	Out-of-Centre	4.7	1.5	7.6	13.5	3.6	1.2	0.1	0.0	0.2	0.8	35.4	0.0	**68.6**	**2.2**
Chiswick	Town Centre	0.0	2.3	0.0	0.7	0.6	3.2	32.9	11.2	4.5	1.3	0.0	0.0	**56.8**	**1.8**
Brentford	Town Centre	0.0	0.1	0.3	5.3	0.7	2.2	0.3	0.3	16.4	15.5	0.0	9.3	**50.5**	**1.6**
Ruislip	Town Centre	22.0	6.2	1.8	0.0	0.0	0.0	0.6	0.0	0.0	0.0	11.7	0.6	**42.9**	**1.4**
Kew Retail Park, Richmond	Out-of-Centre	0.0	0.0	0.1	1.6	2.0	7.0	0.6	0.0	2.8	25.7	0.0	1.2	**41.0**	**1.3**
Hammersmith	Town Centre	0.0	0.1	0.0	0.0	0.2	0.0	12.2	22.4	0.6	0.0	0.0	0.0	**35.6**	**1.2**
Ikea, Drury Way, North Circular, Wembley	Out-of-Centre	0.0	1.6	0.0	0.9	2.7	4.0	5.3	4.8	1.3	0.8	0.0	9.9	**31.4**	**1.0**
Lombardy Retail Park, Hayes	Out-of-Centre	0.3	0.2	1.5	1.1	0.1	0.0	0.1	0.0	0.0	0.0	23.6	0.0	**26.9**	**0.9**
London Designer Outlet, Wembley Park, Wembley	Out-of-Centre	0.3	0.6	0.0	0.0	1.5	0.0	0.0	0.4	0.0	0.0	0.0	11.3	**14.0**	**0.5**
Staines	Town Centre	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.9	11.3	1.1	0.0	**13.5**	**0.4**
Kensington	Town Centre	0.0	0.1	0.0	0.2	0.0	2.0	2.9	1.3	0.5	1.4	0.0	0.0	**8.4**	**0.3**
Chelsea	Town Centre	0.0	0.0	0.0	0.7	0.0	1.0	2.0	1.6	0.2	0.0	0.0	0.0	**5.5**	**0.2**
B&Q, Glencoe Road, Hayes	Out-of-Centre	0.3	0.7	1.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	**3.4**	**0.1**
Tesco Extra, Glencoe Road, Hayes	Out-of-Centre	0.2	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.0	**2.7**	**0.1**
Fulham	Town Centre	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	**0.6**	**0.0**
Sub-Total Destinations Outside Ealing Borough		**109.4**	**63.6**	**39.9**	**129.3**	**66.6**	**75.4**	**160.0**	**155.1**	**53.4**	**360.9**	**320.3**	**330.3**	**1,864.2**	**60.4**
TOTAL Ealing Borough and Destinations Outside Ealing Trade Draw Zone 1-12 (£m)		**152.8**	**121.5**	**108.7**	**187.4**	**170.9**	**217.3**	**248.7**	**173.1**	**82.9**	**389.9**	**344.7**	**421.7**	**2,619.7**	**84.9**
Other Destinations		**27.4**	**18.4**	**15.5**	**17.4**	**11.5**	**32.6**	**33.8**	**8.3**	**6.1**	**157.4**	**31.3**	**106.4**	**466.2**	**15.1**

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Table 4d
Comparison Goods Allocation 2032 - Spend (£) 2015 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2032		**217.8**	**168.6**	**149.6**	**249.4**	**220.6**	**299.2**	**340.1**	**218.0**	**107.7**	**666.5**	**463.0**	**637.3**	**3,737.8**	**100.0**
Ealing Borough Trade Draw Zone 1-12 (£m)															
Ealing Metropolitan Centre	Town Centre	22.7	29.9	32.5	33.9	98.4	135.9	54.2	5.2	28.8	21.3	3.8	49.6	**516.0**	**13.8**
Acton District Centre	Town Centre	0.0	0.4	0.0	0.0	0.1	1.9	24.8	0.5	0.0	0.0	3.0	0.3	**31.1**	**0.8**
Hanwell District Centre [inc.Wickes]	Town Centre	0.0	0.1	0.2	0.5	10.7	1.2	0.0	0.0	0.2	1.8	0.0	0.9	**15.7**	**0.4**
Greenford District Centre	Town Centre	9.5	11.1	29.6	0.8	4.6	1.4	0.2	1.9	0.1	1.0	0.0	12.0	**72.1**	**1.9**
Southall Major Centre	Town Centre	0.0	1.9	5.3	20.2	1.8	3.1	0.4	0.0	0.1	1.0	7.0	0.0	**40.7**	**1.1**
East Acton Neighbourhood Centre [inc.Homebase]	Town Centre	0.0	0.5	0.1	0.5	0.1	0.7	4.1	11.2	0.3	3.0	0.0	2.4	**22.8**	**0.6**
South Ealing Neighbourhood Centre [inc.Wickes]	Town Centre	0.1	0.1	0.0	0.0	0.3	3.7	0.1	0.0	0.5	1.0	0.0	2.9	**8.8**	**0.2**
Sudbury Hill Neighbourhood Centre	Town Centre	1.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**1.4**	**0.0**
Northolt Neighbourhood Centre	Town Centre	12.4	0.3	0.4	0.0	0.0	0.0	0.2	0.3	0.0	0.0	2.2	0.0	**15.7**	**0.4**
Westway Cross Neighbourhood Centre, Greenford	Town Centre	3.2	16.6	7.6	2.4	2.5	0.4	0.0	0.2	0.0	0.3	0.1	6.2	**39.6**	**1.1**
Perivale Neighbourhood Centre	Town Centre	0.3	6.5	0.9	0.0	1.8	1.0	0.0	0.0	0.0	0.0	0.0	1.2	**11.6**	**0.3**
Park Royal Neighbourhood Centre	Town Centre	0.3	0.4	0.0	0.0	0.1	3.3	15.8	0.5	0.0	0.0	0.0	18.4	**38.8**	**1.0**
Pitshanger Lane Neighbourhood Centre	Town Centre	0.0	0.2	0.0	0.0	3.9	4.6	0.0	0.0	0.0	0.0	0.0	0.0	**8.6**	**0.2**
Northfields Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	2.0	0.0	0.0	0.0	**3.1**	**0.1**
King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	3.3	0.3	0.0	0.0	0.0	0.0	0.0	0.4	0.0	**4.1**	**0.1**
Sub-total, Ealing Borough (£m)		**49.4**	**68.4**	**76.5**	**61.7**	**124.6**	**158.3**	**99.7**	**19.9**	**32.1**	**29.3**	**16.4**	**93.8**	**830.2**	**22.2**
Ealing Borough Edge/Out-of-Centre Trade Draw Zone 1-12 (£m)															
Wickes, Hanger Lane	Out-of-Centre	0.0	0.1	0.0	0.0	0.1	0.4	0.3	0.0	0.0	0.3	0.0	2.6	**3.9**	**0.1**
Halfords, Hanger Lane	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
B&Q, Gunnersbury Avenue	Out-of-Centre	0.0	0.0	0.1	2.1	0.2	2.8	4.8	0.7	1.1	4.2	1.2	0.3	**17.7**	**0.5**
B&Q, Western Avenue, Nr Park Royal	Out-of-Centre	0.7	1.1	0.3	0.4	0.4	1.9	1.4	1.0	0.0	0.0	0.9	4.6	**12.8**	**0.3**
Great Western Industrial/Retail Park, Southall	Out-of-Centre	2.3	0.1	6.0	6.5	0.8	6.6	0.6	0.0	2.4	1.5	11.4	9.0	**47.1**	**1.3**
The Sofa and Chair Company, Western Ave, Nr Park Royal	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Sub-Total, Edge/Out-of-Centre		**3.1**	**1.3**	**6.4**	**9.0**	**1.5**	**11.7**	**7.1**	**1.7**	**3.6**	**6.0**	**13.5**	**16.5**	**81.5**	**2.2**
TOTAL EALING BOROUGH Trade Draw Zone 1-12 (£m)		**52.5**	**69.7**	**82.9**	**70.7**	**126.2**	**169.9**	**106.8**	**21.6**	**35.7**	**35.3**	**29.9**	**110.3**	**911.7**	**24.4**
Destinations Outside Ealing Borough Trade Draw Zone 1-12 (£m)															
Westfield/Shepherds Bush	Town Centre	13.9	13.2	10.2	6.7	22.7	26.1	66.2	95.5	5.5	21.0	8.1	72.2	**361.3**	**9.7**
Hounslow	Town Centre	0.1	3.1	3.8	47.8	0.2	0.0	2.7	0.3	7.6	136.5	7.8	0.9	**210.9**	**5.6**
Uxbridge	Town Centre	24.9	1.5	4.5	17.9	1.7	1.3	4.4	1.7	0.1	5.0	132.0	3.2	**198.0**	**5.3**
Hayes	Town Centre	8.8	9.1	6.7	38.3	0.1	0.3	0.0	0.0	0.3	3.1	127.9	2.2	**196.8**	**5.3**
Wembley	Town Centre	5.0	2.7	2.8	3.7	4.9	2.6	1.5	6.3	0.0	1.9	0.5	133.6	**165.5**	**4.4**
Brent Cross Shopping Centre	Out-of-Centre	0.7	7.5	0.8	2.2	18.4	8.5	11.8	1.2	0.6	7.3	3.8	101.1	**164.1**	**4.4**
London West End	Town Centre	4.2	4.8	1.1	1.5	13.2	25.5	25.8	30.5	4.6	6.4	16.1	17.2	**150.9**	**4.0**
Richmond	Town Centre	0.0	0.0	0.0	3.9	1.0	0.2	5.9	0.0	3.3	105.1	0.0	0.0	**119.4**	**3.2**
Kingston	Town Centre	0.1	0.1	1.0	5.6	3.5	1.0	4.4	0.2	9.6	84.1	1.4	0.0	**111.1**	**3.0**
Harrow	Town Centre	41.0	17.8	0.8	0.2	0.8	0.0	1.2	0.0	0.0	0.0	5.2	29.2	**96.1**	**2.6**
Hayes Bridge Retail Park, Hayes	Out-of-Centre	5.6	1.8	9.1	16.5	4.3	1.4	0.2	0.0	0.3	1.0	43.6	0.0	**83.8**	**2.2**
Chiswick	Town Centre	0.0	2.8	0.0	0.9	0.7	3.9	39.6	13.5	5.5	1.6	0.0	0.0	**68.4**	**1.8**
Brentford	Town Centre	0.0	0.1	0.4	6.5	0.9	2.7	0.3	0.3	19.8	18.9	0.0	11.3	**61.1**	**1.6**
Ruislip	Town Centre	26.5	7.5	2.2	0.0	0.0	0.0	0.7	0.0	0.0	0.0	14.4	0.7	**52.1**	**1.4**
Kew Retail Park, Richmond	Out-of-Centre	0.0	0.0	0.1	2.0	2.5	8.4	0.7	0.0	3.3	31.3	0.0	1.5	**49.8**	**1.3**
Hammersmith	Town Centre	0.0	0.2	0.0	0.0	0.3	0.0	14.7	26.9	0.7	0.0	0.0	0.0	**42.8**	**1.1**
Ikea, Drury Way, North Circular, Wembley	Out-of-Centre	0.0	1.9	0.0	1.1	3.3	4.8	6.4	5.8	1.6	1.0	0.0	11.9	**37.8**	**1.0**
Lombardy Retail Park, Hayes	Out-of-Centre	0.4	0.2	1.8	1.4	0.1	0.0	0.1	0.0	0.0	0.0	29.1	0.0	**33.1**	**0.9**
London Designer Outlet, Wembley Park, Wembley	Out-of-Centre	0.3	0.7	0.0	0.0	1.8	0.0	0.0	0.5	0.0	0.0	0.0	13.6	**16.9**	**0.5**
Staines	Town Centre	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	1.0	13.8	1.4	0.0	**16.5**	**0.4**
Kensington	Town Centre	0.0	0.2	0.0	0.2	0.0	2.4	3.5	1.5	0.6	1.8	0.0	0.0	**10.1**	**0.3**
Chelsea	Town Centre	0.0	0.0	0.0	0.9	0.0	1.2	2.4	1.9	0.2	0.0	0.0	0.0	**6.6**	**0.2**
B&Q, Glencoe Road, Hayes	Out-of-Centre	0.4	0.8	1.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	**4.2**	**0.1**
Tesco Extra, Glencoe Road, Hayes	Out-of-Centre	0.2	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0	**3.3**	**0.1**
Fulham	Town Centre	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	**0.8**	**0.0**
Sub-Total Destinations Outside Ealing Borough		**132.2**	**76.7**	**48.0**	**157.5**	**80.5**	**90.3**	**192.6**	**186.4**	**64.5**	**439.5**	**394.5**	**398.6**	**2,261.3**	**60.5**
TOTAL Ealing Borough and Destinations Outside Ealing Trade Draw Zone 1-12 (£m)		**184.7**	**146.4**	**131.0**	**228.2**	**206.6**	**260.3**	**299.4**	**208.0**	**100.3**	**474.8**	**424.4**	**508.9**	**3,173.0**	**84.9**
Other Destinations		**33.2**	**22.2**	**18.7**	**21.2**	**13.9**	**39.0**	**40.7**	**10.0**	**7.4**	**191.6**	**38.6**	**128.4**	**564.8**	**15.1**

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London Borough of Ealing Retail and Town Centres Study 2018

Comparison Goods Need Assessment

Table 4e
Comparison Goods Allocation 2037 - Spend (£) 2015 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2037		**264.0**	**204.3**	**181.1**	**304.6**	**267.3**	**361.3**	**412.3**	**260.5**	**131.7**	**817.7**	**573.2**	**770.7**	**4,548.6**	**100.0**
Ealing Borough Trade Draw Zone 1-12 (£m)															
Ealing Metropolitan Centre	Town Centre	27.5	36.3	39.3	41.4	119.3	164.0	65.7	6.2	35.2	26.1	4.7	60.0	**625.6**	**13.8**
Acton District Centre	Town Centre	0.0	0.5	0.0	0.0	0.1	2.4	30.1	0.7	0.0	0.0	3.7	0.4	**37.8**	**0.8**
Hanwell District Centre [inc.Wickes]	Town Centre	0.0	0.1	0.2	0.7	13.0	1.5	0.0	0.0	0.3	2.3	0.0	1.1	**19.1**	**0.4**
Greenford District Centre	Town Centre	11.5	13.4	35.8	1.0	5.6	1.7	0.2	2.3	0.1	1.2	0.0	14.5	**87.3**	**1.9**
Southall Major Centre	Town Centre	0.0	2.3	6.4	24.7	2.2	3.8	0.4	0.0	0.2	1.2	8.6	0.0	**49.7**	**1.1**
East Acton Neighbourhood Centre [inc.Homebase]	Town Centre	0.0	0.6	0.1	0.6	0.1	0.8	4.9	13.4	0.4	3.7	0.0	2.8	**27.5**	**0.6**
South Ealing Neighbourhood Centre [inc.Wickes]	Town Centre	0.1	0.1	0.0	0.0	0.4	4.5	0.1	0.0	0.6	1.2	0.0	3.5	**10.6**	**0.2**
Sudbury Hill Neighbourhood Centre	Town Centre	1.2	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**1.7**	**0.0**
Northolt Neighbourhood Centre	Town Centre	15.0	0.3	0.4	0.0	0.0	0.0	0.2	0.4	0.0	0.0	2.7	0.0	**19.1**	**0.4**
Westway Cross Neighbourhood Centre, Greenford	Town Centre	3.8	20.2	9.2	2.9	3.1	0.5	0.0	0.2	0.0	0.3	0.1	7.5	**47.9**	**1.1**
Perivale Neighbourhood Centre	Town Centre	0.4	7.9	1.1	0.0	2.1	1.1	0.0	0.0	0.0	0.0	0.0	1.5	**14.1**	**0.3**
Park Royal Neighbourhood Centre	Town Centre	0.4	0.5	0.0	0.0	0.1	3.9	19.2	0.6	0.0	0.0	0.0	22.2	**47.0**	**1.0**
Pitshanger Lane Neighbourhood Centre	Town Centre	0.0	0.2	0.0	0.0	4.7	5.5	0.0	0.0	0.0	0.0	0.0	0.0	**10.4**	**0.2**
Northfields Neighbourhood Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	2.4	0.0	0.0	0.0	**3.8**	**0.1**
King Street Neighbourhood Centre	Town Centre	0.0	0.0	0.0	4.1	0.4	0.0	0.0	0.0	0.0	0.0	0.5	0.0	**5.0**	**0.1**
Sub-total, Ealing Borough (£m)		**59.9**	**82.9**	**92.6**	**75.3**	**151.0**	**191.1**	**120.9**	**23.8**	**39.3**	**36.0**	**20.4**	**113.5**	**1,006.6**	**22.1**
Ealing Borough Edge/Out-of-Centre Trade Draw Zone 1-12 (£m)															
Wickes, Hanger Lane	Out-of-Centre	0.1	0.1	0.0	0.0	0.1	0.5	0.4	0.0	0.0	0.4	0.0	3.1	**4.7**	**0.1**
Halfords, Hanger Lane	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
B&Q, Gunnersbury Avenue	Out-of-Centre	0.1	0.0	0.1	2.6	0.3	3.4	5.9	0.8	1.4	5.2	1.4	0.4	**21.5**	**0.5**
B&Q, Western Avenue, Nr Park Royal	Out-of-Centre	0.9	1.4	0.4	0.4	0.5	2.3	1.6	1.2	0.0	0.0	1.1	5.6	**15.5**	**0.3**
Great Western Industrial/Retail Park, Southall	Out-of-Centre	2.7	0.1	7.3	8.0	0.9	8.0	0.7	0.0	3.0	1.8	14.1	10.8	**57.5**	**1.3**
The Sofa and Chair Company, Western Ave, Nr Park Royal	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Sub-Total, Edge/Out-of-Centre		**3.8**	**1.6**	**7.8**	**11.0**	**1.9**	**14.1**	**8.6**	**2.1**	**4.4**	**7.3**	**16.7**	**19.9**	**99.2**	**2.2**
TOTAL EALING BOROUGH Trade Draw Zone 1-12 (£m)		**63.6**	**84.4**	**100.4**	**86.3**	**152.9**	**205.2**	**129.5**	**25.8**	**43.7**	**43.3**	**37.1**	**133.4**	**1105.7**	**24.3**
Destinations Outside Ealing Borough Trade Draw Zone 1-12 (£m)															
Westfield/Shepherds Bush	Town Centre	16.8	16.0	12.4	8.2	27.6	31.5	80.2	114.1	6.7	25.8	10.0	87.4	**436.5**	**9.6**
Hounslow	Town Centre	0.2	3.7	4.7	58.4	0.3	0.0	3.3	0.4	9.3	167.5	9.7	1.1	**258.4**	**5.7**
Uxbridge	Town Centre	30.2	1.8	5.4	21.8	2.0	1.5	5.3	2.1	0.1	6.2	163.4	3.8	**243.6**	**5.4**
Hayes	Town Centre	10.6	11.0	8.1	46.7	0.1	0.4	0.0	0.0	0.4	3.8	158.4	2.7	**242.3**	**5.3**
Wembley	Town Centre	6.0	3.2	3.4	4.6	5.9	3.2	1.8	7.5	0.0	2.3	0.7	161.5	**200.2**	**4.4**
Brent Cross Shopping Centre	Out-of-Centre	0.9	9.1	1.0	2.6	22.3	10.3	14.3	1.5	0.8	9.0	4.7	122.3	**198.8**	**4.4**
London West End	Town Centre	5.1	5.9	1.4	1.8	16.0	30.8	31.3	36.4	5.6	7.9	19.9	20.8	**182.7**	**4.0**
Richmond	Town Centre	0.0	0.0	0.0	4.8	1.3	0.3	7.2	0.0	4.0	128.9	0.0	0.0	**146.4**	**3.2**
Kingston	Town Centre	0.2	0.1	1.3	6.8	4.3	1.2	5.4	0.2	11.7	103.2	1.7	0.0	**136.0**	**3.0**
Harrow	Town Centre	49.6	21.6	1.0	0.3	1.0	0.0	1.5	0.0	0.0	0.0	6.4	35.3	**116.6**	**2.6**
Hayes Bridge Retail Park, Hayes	Out-of-Centre	6.8	2.2	11.1	20.1	5.2	1.7	0.2	0.0	0.4	1.2	54.0	0.0	**102.9**	**2.3**
Chiswick	Town Centre	0.0	3.4	0.0	1.1	0.8	4.7	48.0	16.1	6.7	1.9	0.0	0.0	**82.7**	**1.8**
Brentford	Town Centre	0.0	0.1	0.5	7.9	1.1	3.2	0.4	0.4	24.2	23.1	0.0	13.6	**74.6**	**1.6**
Ruislip	Town Centre	32.2	9.1	2.6	0.0	0.0	0.0	0.9	0.0	0.0	0.0	17.9	0.9	**63.5**	**1.4**
Kew Retail Park, Richmond	Out-of-Centre	0.0	0.0	0.1	2.4	3.0	10.2	0.8	0.0	4.1	38.4	0.0	1.8	**60.8**	**1.3**
Hammersmith	Town Centre	0.0	0.2	0.0	0.0	0.3	0.0	17.9	32.2	0.9	0.0	0.0	0.0	**51.4**	**1.1**
Ikea, Drury Way, North Circular, Wembley	Out-of-Centre	0.0	2.4	0.0	1.3	4.0	5.8	7.8	6.9	1.9	1.2	0.0	14.4	**45.7**	**1.0**
Lombardy Retail Park, Hayes	Out-of-Centre	0.5	0.2	2.2	1.7	0.1	0.0	0.1	0.0	0.0	0.0	36.0	0.0	**40.8**	**0.9**
London Designer Outlet, Wembley Park, Wembley	Out-of-Centre	0.4	0.9	0.0	0.0	2.2	0.0	0.0	0.5	0.0	0.0	0.0	16.4	**20.4**	**0.4**
Staines	Town Centre	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	1.3	16.9	1.7	0.0	**20.2**	**0.4**
Kensington	Town Centre	0.0	0.2	0.0	0.2	0.0	2.9	4.2	1.8	0.7	2.2	0.0	0.0	**12.3**	**0.3**
Chelsea	Town Centre	0.0	0.0	0.0	1.1	0.0	1.4	2.9	2.3	0.3	0.0	0.0	0.0	**8.0**	**0.2**
B&Q, Glencoe Road, Hayes	Out-of-Centre	0.5	1.0	1.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0	**5.1**	**0.1**
Tesco Extra, Glencoe Road, Hayes	Out-of-Centre	0.3	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	**4.0**	**0.1**
Fulham	Town Centre	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	**0.9**	**0.0**
Sub-Total Destinations Outside Ealing Borough		**160.2**	**92.9**	**58.2**	**192.4**	**97.5**	**109.0**	**233.5**	**222.7**	**78.9**	**539.3**	**488.4**	**482.0**	**2,754.9**	**60.6**
TOTAL Ealing Borough and Destinations Outside Ealing Trade Draw Zone 1-12 (£m)		**223.8**	**177.3**	**158.5**	**278.7**	**250.4**	**314.2**	**363.0**	**248.5**	**122.6**	**582.6**	**525.4**	**615.4**	**3,860.6**	**84.9**
Other Destinations		**40.2**	**26.9**	**22.6**	**25.8**	**16.9**	**47.1**	**49.3**	**12.0**	**9.1**	**235.1**	**47.7**	**155.3**	**688.0**	**15.1**

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London Borough of Ealing Retail and Town Centres Study 2018
Comparison Goods Need Assessment

Table 5
Comparison Goods Allocation 2017 - % Market Share

Zone Centre/Store	Policy Allocation	Floorspace Sq m Net
Ealing Borough Town Centres		
Ealing Metropolitan Centre	Town Centre	37,896
Acton District Centre	Town Centre	2,898
Hanwell District Centre [inc.Wickes]	Town Centre	6,793
Greenford District Centre	Town Centre	5,464
Southall Major Centre	Town Centre	14,032
TOTAL FLOORSPACE		**67,083**

Source: Experian Goad

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Table 6a

Ealing Metropolitan, Major and District Centres: Comparison Goods Need sq m net

	EALING BOROUGH-WIDE COMPARISON GOODS NEED				
	2017	2022	2027	2032	2037
Total Available Expenditure (£m)	2,209.6	2,541.2	3,085.8	3,737.8	4,548.6
Market Share from Survey Area (%)	18	18	18	18	18
Total Spend (£m)	404.4	463.2	560.1	675.8	819.5
Inflow from Beyond Zone 1-12 Survey Area	62.5	71.6	86.6	104.5	126.8
Total Turnover (£m)	466.9	534.9	646.7	780.3	946.3
Existing Retail Floorspace (sq.m net)	67,083	67,083	67,083	67,083	67,083
Sales per sqm net £	6,960	7,632	8,525	9,505	10,147
Sales from Existing Floorspace (£m)	466.9	511.9	571.9	637.6	680.7
Residual Spending to support new floorspace (£m)	0.0	22.9	74.8	142.6	265.6
Sales per sq m net in new shops (£)	8,000	8,772	9,799	10,925	11,662
Capacity for new floorspace (sqm net)	0	2,613	7,637	13,054	22,774

Table 6b

Ealing Metropolitan and Major Centre Comparison Goods Need Sq M Net

	EALING METROPOLITAN CENTRE					SOUTHALL MAJOR CENTRE				
	2017	2022	2027	2032	2037	2017	2022	2027	2032	2037
Total Available Expenditure (£m)	2,209.6	2,541.2	3,085.8	3,737.8	4,548.6	2,209.6	2,541.2	3,085.8	3,737.8	4,548.6
Market Share from Survey Area (%)	14	14	14	14	14	1	1	1	1	1
Total Spend (£m) Zone 1-12	309.2	354.1	428.0	516.0	625.6	23.8	27.5	33.5	40.7	49.7
Inflow from Beyond Zone 1-12 Survey Area	54.6	62.5	75.5	91.1	110.4	4.2	4.8	5.9	7.2	8.8
Total Town Centre Turnover (£m)	363.8	416.6	503.5	607.1	736.0	28.0	32.3	39.4	47.9	58.5
Existing Retail Floorspace (sq.m net)	37,896	37,896	37,896	37,896	37,896	14,032	14,032	14,032	14,032	14,032
Sales per sqm net £	9,600	10,526	11,759	13,110	13,995	1,995	2,188	2,444	2,725	2,909
Sales from Existing Floorspace (£m)	363.8	398.9	445.6	496.8	530.3	28.0	30.7	34.3	38.2	40.8
Residual Spending to support new floorspace (£m)	0.0	17.7	57.9	110.3	205.6	0.0	1.6	5.1	9.7	17.7
Sales per sq m net in new shops (£)	8,000	8,772	9,799	10,925	11,662	6,000	6,579	7,349	8,194	8,747
Capacity for new floorspace (sqm net)	0	2,022	5,912	10,094	17,632	0	249	696	1,181	2,022

Table 6c

Ealing District Centre Comparison Goods Need Sq M Net

	ACTON DISTRICT CENTRE					GREENFORD DISTRICT CENTRE					HANWELL DISTRICT CENTRE				
	2017	2022	2027	2032	2037	2017	2022	2027	2032	2037	2017	2022	2027	2032	2037
Total Available Expenditure (£m)	2,209.6	2,541.2	3,085.8	3,737.8	4,548.6	2,209.6	2,541.2	3,085.8	3,737.8	4,548.6	2,209.6	2,541.2	3,085.8	3,737.8	4,548.6
Market Share from Survey Area (%)	1	1	1	1	1	2	2	2	2	2	0	0	0	0	0
Total Spend (£m)	18.6	21.3	25.8	31.1	37.8	43.4	49.6	59.8	72.1	87.3	9.4	10.8	13.0	15.7	19.1
Inflow from Beyond Zone 1-12 Survey Area	1.0	1.1	1.4	1.6	2.0	2.3	2.6	3.1	3.8	4.6	0.5	0.6	0.7	0.8	1.0
Total Town Centre Turnover (£m)	19.5	22.4	27.2	32.8	39.8	45.7	52.2	62.9	75.9	91.9	9.9	11.3	13.7	16.6	20.1
Existing Retail Floorspace (sq.m net)	2,898	2,898	2,898	2,898	2,898	5,464	5,464	5,464	5,464	5,464	6,793	6,793	6,793	6,793	6,793
Sales per sqm net £	6,740	7,390	8,256	9,205	9,826	8,363	9,170	10,244	11,421	12,192	1,383	1,516	1,694	1,889	2,016
Sales from Existing Floorspace (£m)	19.5	21.4	23.9	26.7	28.5	45.7	50.1	56.0	62.4	66.6	9.4	10.3	11.5	12.8	13.7
Residual Spending to support new floorspace (£m)	0.0	1.0	3.2	6.1	11.3	0.0	2.1	7.0	13.5	25.3	0.5	1.0	2.2	3.7	6.4
Sales per sq m net in new shops (£)	6,000	6,579	7,349	8,194	8,747	6,000	6,579	7,349	8,194	8,747	6,000	6,579	7,349	8,194	8,747
Capacity for new floorspace (sqm net)	0	153	442	745	1,294	0	313	946	1,647	2,890	0	156	298	456	733