West London Alliance Town Centres Study: Phase 1 Paper

PREPARED FOR:

WEST LONDON ALLIANCE

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Whythawk delivers integrated open data consulting, software and infrastructure development, and capacity-building for open knowledge data services for governments, institutions and organisations. Whythawk produce Sqwyre, an online market intelligence service helping you assess opportunities and risks for every commercial property in England and Wales.

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Introduction

The nature, shape and usage of town centres has been changing globally for decades. The narrative across London is well established: intense pressure and demand on the housing market coupled with a consolidation of retail space in central London and a few dedicated shopping areas presenting existential challenges for the survival of town centres and high streets, particularly in deprived areas. Covid has upended this narrative, with some of the sharpest contractions in occupancy rates seen in Central London and a growing shift towards remote working in London's inner and outer boroughs.

This paper is the first in a series being produced as part of a Town Centre Study for the West London Alliance. This initial report looks at what the data tells us about how West London town centres have changed since 2012 and takes a benchmarking approach to provide typologies through which we can understand the trends that have affected them. It will be supplemented by a second report taking a more qualitative approach, based on an analysis of long-term retail, planning, and socio-economic trends across the five boroughs. These will be synthesised to produce a clear set of options and recommendations for future development.

As a result, at this stage our paper focusses on analysing and describing trends in the data rather than seeking to draw any firm conclusions.

What data do we have available?

Our analysis is based on Whythawk's proprietary dataset which tracks hereditaments across the UK, and for commercial properties enables us to understand changes in occupancy, size, and rates payable as well as the creation/removal of hereditaments.

As such, we can look at how the number of properties of different use classes – for instance retail, offices, or leisure centres – have changed over time, as well as the occupancy rates and size of these properties. These can be aggregated to draw conclusions for town centre groupings.

An example of an aggregated read-out from the Whythawk data base has been extracted below.

Date	Town Centre	Borough	Size (km^2)	Class E sub-group	Status	Floor Area (m^2)
2012	Ealing	Ealing	6.807	C	all	9,953
2012	Ealing	Ealing	6.807	C	occupied	9,183
2012	Ealing	Ealing	6.807	C	void	771
2012	Ealing	Ealing	6.807	A	all	126,277
2012	Ealing	Ealing	6.807	A	occupied	125,434

What questions can we answer at this stage?

We can use this data to interrogate the static nature of town centres (and existing defined boundaries), as well as to understand changes over time. We can do this using a series of metrics:

- Commercial activity within and outwith current town centres
- Floor area by use type within town centres
- Occupancy/vacancy rates in town centres

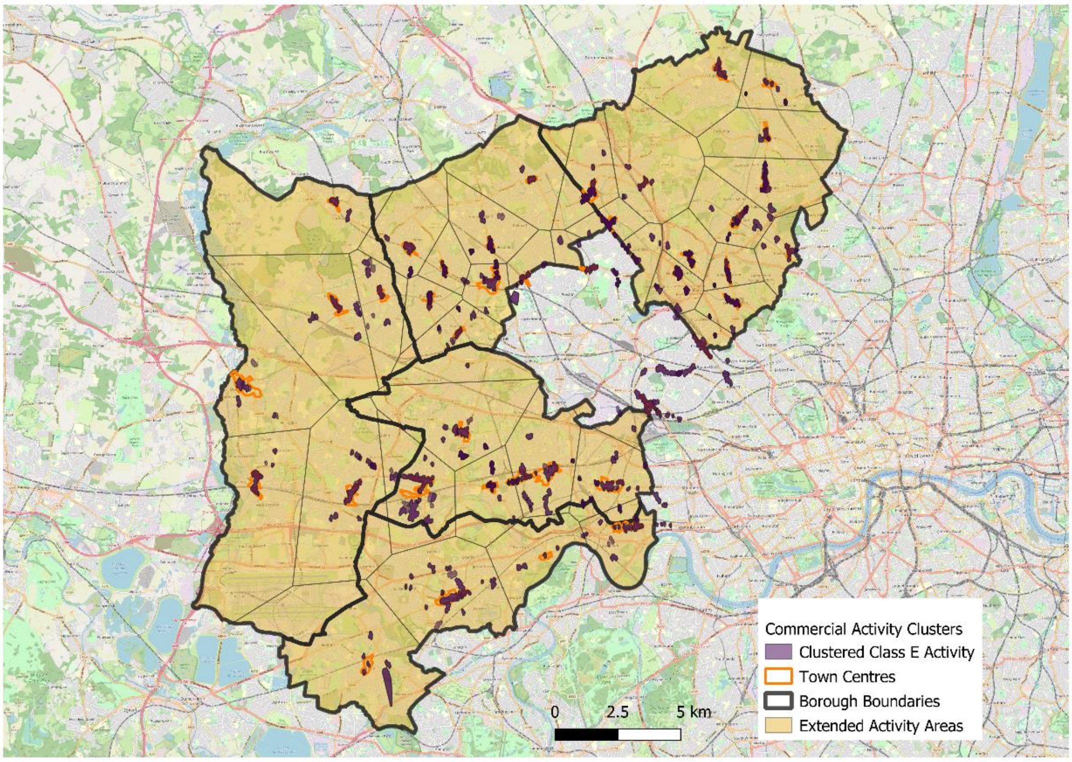
In order to provide focus for this paper, we have devised a series of research questions based on these metrics:

1. Does economic activity take place within town centres (and their existing defined boundaries), or has it shifted over time?
2. What type of commercial space has been growing or shrinking in West London?
3. Has vacancy been increasing in certain commercial use types, boroughs, and town centres?
4. Are there discernible Covid-19 impacts?
5. How can we group and benchmark town centres using this data?

What have we been able to conclude?

Research question 1 – Town centre boundaries

The research team undertook a cluster analysis to identify where economic activity is centred based on the existence of commercial property. This yielded the below visualization, where purple are clusters of activity and orange marks the current town centre boundaries.



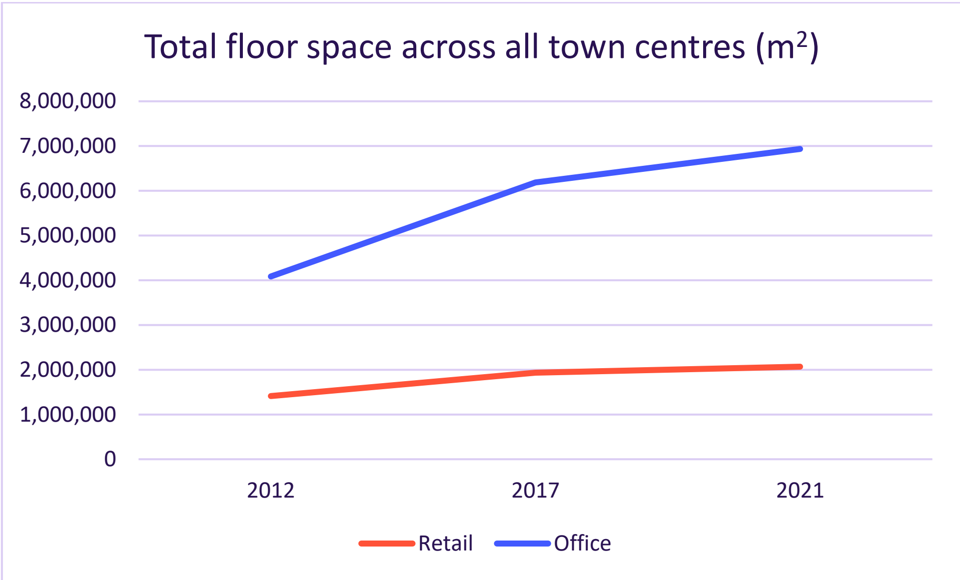
This shows that town centres have remained a good proxy for zones of economic activity across West London. Where activity falls outside of town centres, it is normally adjacent to an historic centre and represents growth rather than migration. Examples of this include:

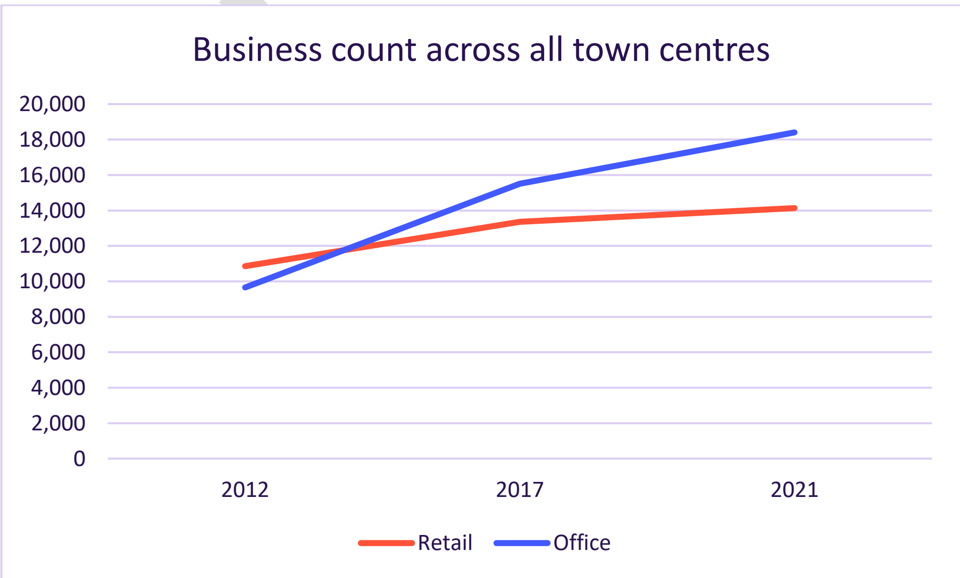
- to the south of Southall – King Street and Featherstone Road
- to the south-east of Feltham
- to the south of Ealing – St Mary's Road and South Ealing Road
- to the south of West Ealing – Northfield Avenue

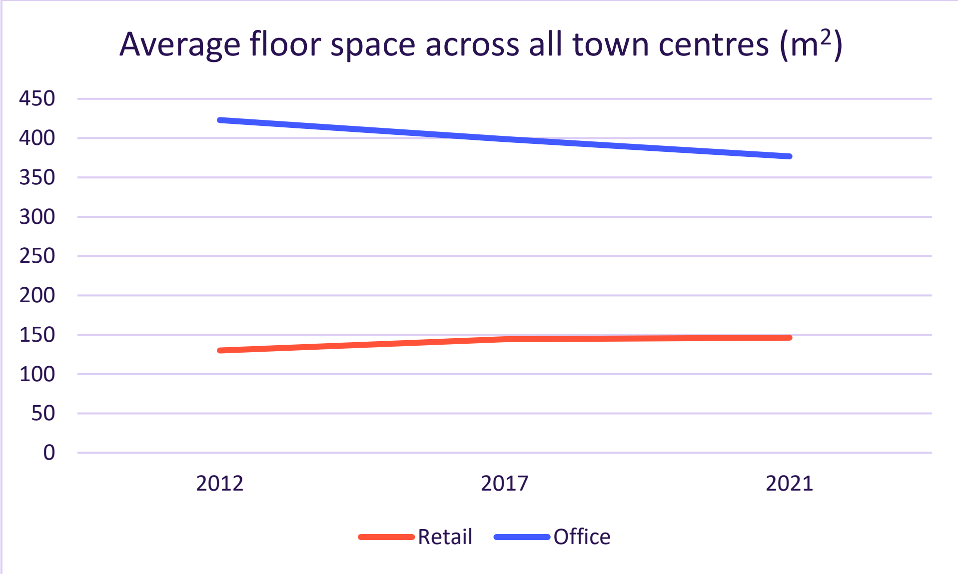
Nevertheless, looking only within town centre boundaries means we underestimate the overall commercial and economic activity taking place. Quantitative estimates of the scale of this are provided in Appendix I.

Research question 2 – Growth in certain types of space

Offices and retail are – as expected – by far the largest uses for commercial space. Their relative proportion has changed over time, with offices becoming more dominant in terms of both floor area and business count. Importantly the stock of retail space has also continued to grow albeit at a slower rate, suggesting that any loss of retail space through conversions has been compensated for in aggregate by the creation of new space. Average floor space for a retail unit grew, whilst for offices it fell – suggesting some divisions of existing space.

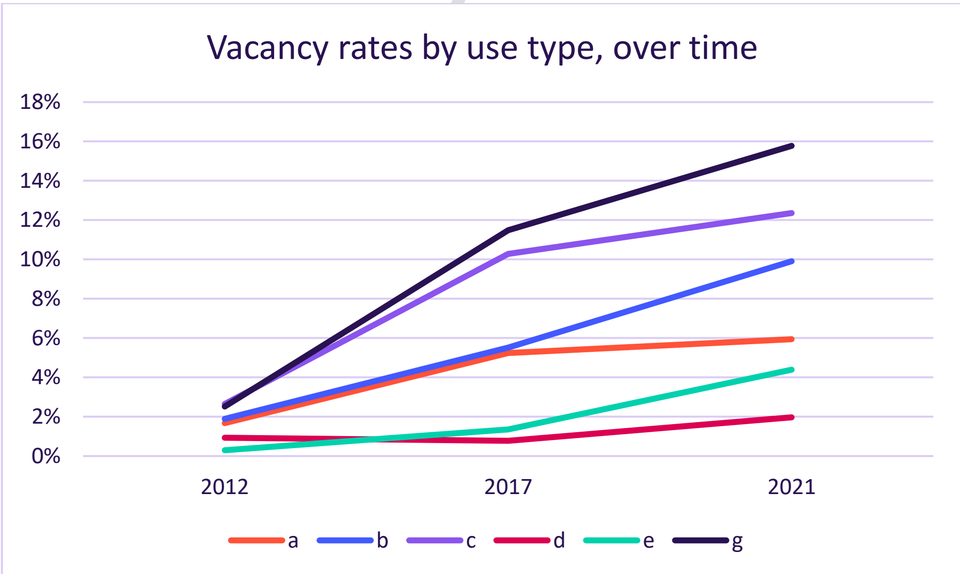






Research question 3 – Vacancy rates in certain types of space, boroughs, and town centres

Vacancy rates have increased across all use types[1] since 2012, with a particularly marked increase amongst offices. This would suggest that newly created office space (as seen in the above analysis for research question 2) is either going unoccupied or more likely it is displacing the use of older, less desirable building stock.



This analysis is replicated for each town centre in the full data analysis presented in Appendix I, which demonstrates some significant variations. Ealing, Hounslow, and Hillingdon have experienced the largest increase in vacancy across their town centres, driven mainly by office space although increases have also been seen across other use types

[1] For breakdown of types, see Table 1 in Appendix A

(particularly retail). Barnet and Harrow have seen less marked changes, and interestingly Harrow has seen a decrease in retail vacancy since 2017 – bucking the wider local and national trend.

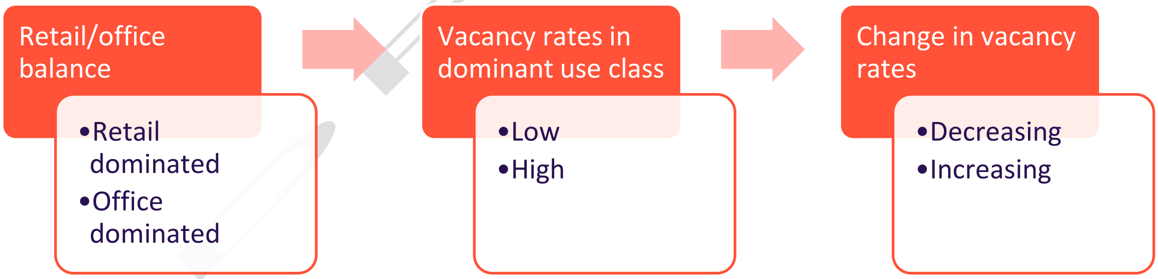
Research question 4 – Covid-19 impacts

The data does not appear to bear out a narrative of significant shifts in the pre-existing long-term trends in West London town centres in response to the pandemic. Over a longer-term time horizon, there has been significant growth in office and retail space. This did not appear to slow significantly during and post Covid – perhaps reflecting the long-term nature of construction and real estate investment decisions.

Space has not been radically used in a different way – vacancy rates have continued to move in an upwards trajectory across most commercial use classes and if anything have grown more slowly. This perhaps reflects the nature and extent of government support over the pandemic period.

Research question 5 – Benchmarking

The Whythawk dataset enables us to benchmark town centres against certain typologies. We can construct these using the metrics we have available – floor area and vacancy rates, set out by use class type with dynamic change over time. This is set out in the diagram below:



This makes for eight different typologies:

1. Growing retail hubs (low and decreasing vacancy)
2. Established retail hubs at a turning point (low but increasing vacancy)
3. Recovering retail hubs (high but decreasing vacancy)
4. Declining retail hubs (high and increasing vacancy)

5. Growing office hubs
6. Established office hubs at a turning point
7. Recovering office hubs
8. Declining office hubs

Low (high) vacancy rate is defined as being below (above) the WLA average while vacancy rates are determined to be decreasing (increasing) if they were lower (higher) in 2021 than in 2017. Town Centre Areas are assessed based on data for the identified cluster rather than the defined town centre boundary since this provides a more accurate representation of actual economic activity.

The results of this classification analysis are presented below:

Town centre typologies: Retail

Kenton	1	Low	Decreasing
Harrow	1	Low	Decreasing
Wealdstone	1	Low	Decreasing
Pinner	1	Low	Decreasing
Rayners Lane	1	Low	Decreasing
Southall	1	Low	Decreasing
Harlesden	1	Low	Decreasing
Chiswick	1	Low	Decreasing
Golders Green	1	Low	Decreasing
Church End, Finchley	1	Low	Decreasing
Mill Hill	1	Low	Decreasing
Brent Street	1	Low	Decreasing
New Barnet	1	Low	Decreasing
Kingsbury	1	Low	Decreasing
Ealing	2	Low	Increasing
South Harrow	2	Low	Increasing
Hayes	2	Low	Increasing
Eastcote	2	Low	Increasing
Ruislip	2	Low	Increasing
Greenford	2	Low	Increasing
Stanmore	2	Low	Increasing
Hendon Central	2	Low	Increasing
East Finchley	2	Low	Increasing

Cricklewood	2	Low	Increasing
North Harrow	2	Low	Increasing
Colindale/ The Hyde	2	Low	Increasing
Hounslow	3	High	Decreasing
Whetstone	3	High	Decreasing
Acton	4	High	Increasing
Uxbridge	4	High	Increasing
Northwood	4	High	Increasing
Yiewsley/ West Drayton	4	High	Increasing
Temple Fortune	4	High	Increasing
North Finchley	4	High	Increasing
Brentford	4	High	Increasing
Feltham High Street	4	High	Increasing
Chipping Barnet	4	High	Increasing
Edgware	4	High	Increasing
Burnt Oak	4	High	Increasing
Hanwell	4	High	Increasing

Town centre typologies: Office

Wealdstone	5	Low	Decreasing
Pinner	5	Low	Decreasing
Stanmore	5	Low	Decreasing
Uxbridge	5	Low	Decreasing
Feltham High Street	5	Low	Decreasing
Edgware	5	Low	Decreasing
Harrow	6	Low	Increasing
Acton	6	Low	Increasing
Greenford	6	Low	Increasing
Southall	6	Low	Increasing
Harlesden	6	Low	Increasing
Hounslow	6	Low	Increasing
Temple Fortune	6	Low	Increasing

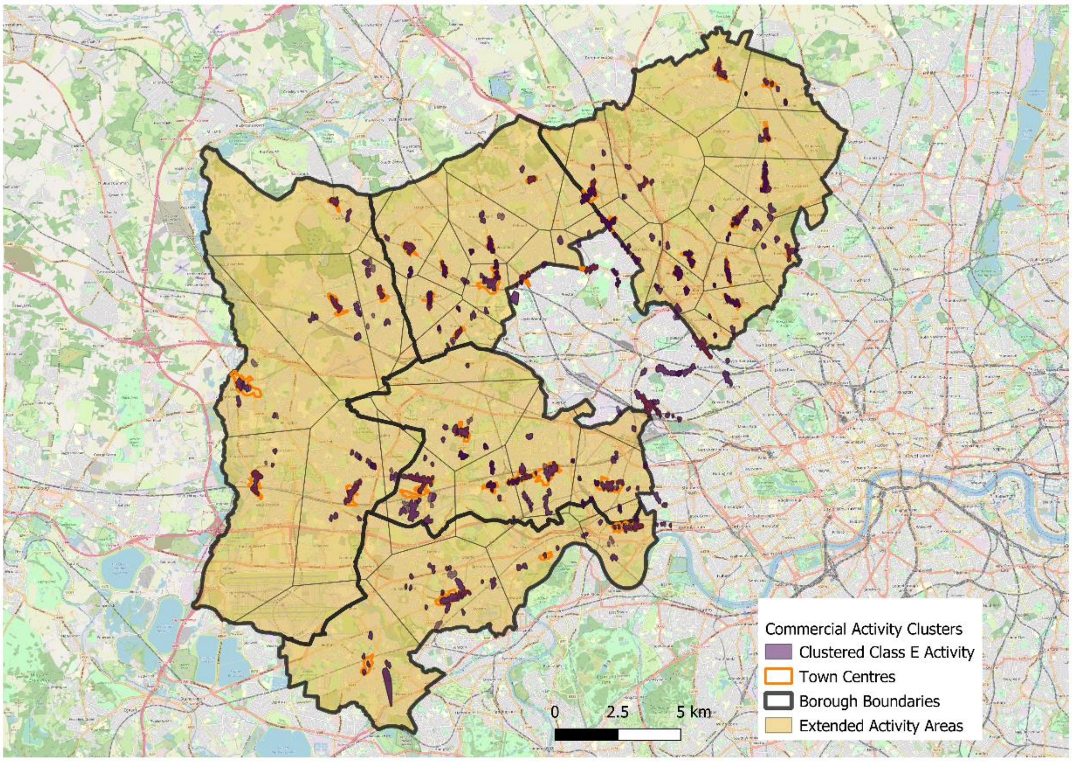
Golders Green	6	Low	Increasing
Church End, Finchley	6	Low	Increasing
East Finchley	6	Low	Increasing
Mill Hill	6	Low	Increasing
Burnt Oak	6	Low	Increasing
Cricklewood	6	Low	Increasing
Hanwell	6	Low	Increasing
North Harrow	6	Low	Increasing
Colindale/ The Hyde	6	Low	Increasing
South Harrow	7	High	Decreasing
Rayners Lane	7	High	Decreasing
Brentford	7	High	Decreasing
Ealing	8	High	Increasing
Hayes	8	High	Increasing
Eastcote	8	High	Increasing
Ruislip	8	High	Increasing
Northwood	8	High	Increasing
Yiewsley/ West Drayton	8	High	Increasing
Chiswick	8	High	Increasing
Hendon Central	8	High	Increasing
Whetstone	8	High	Increasing
North Finchley	8	High	Increasing
Chipping Barnet	8	High	Increasing
Brent Street	8	High	Increasing
New Barnet	8	High	Increasing
Kenton	U	#N/A	#N/A
Kingsbury	U	#N/A	#N/A

Kenton and Kingsbury are unrated (U) since data on Class E sub-class g (office) are not available for these Town Centre Areas.

APPENDIX I Full data analysis

The following analysis has been carried out for the 40 Town Centre zones in the WLA area (shown in orange) with additional analysis for all significant business clusters (those with more than 15 commercial activity entities within 150 metres of each other - shown in purple) occurring within the hinterlands of each Town Centre, defined by the voroni polygons in Figure 1 below.

Figure 1: Town Centres and Extended Clustered Activity Zones



Initial Summary Statistics - Commercial Floor Area and Business Activities

This section presents some summary tables and plots aggregating all data according to Class E sub-class activity across the three time slices (2012, 2017 and 2021) in this study. These types of activity are defined in Table 1. Note that NA refers to totals across all Class E categories in the period.

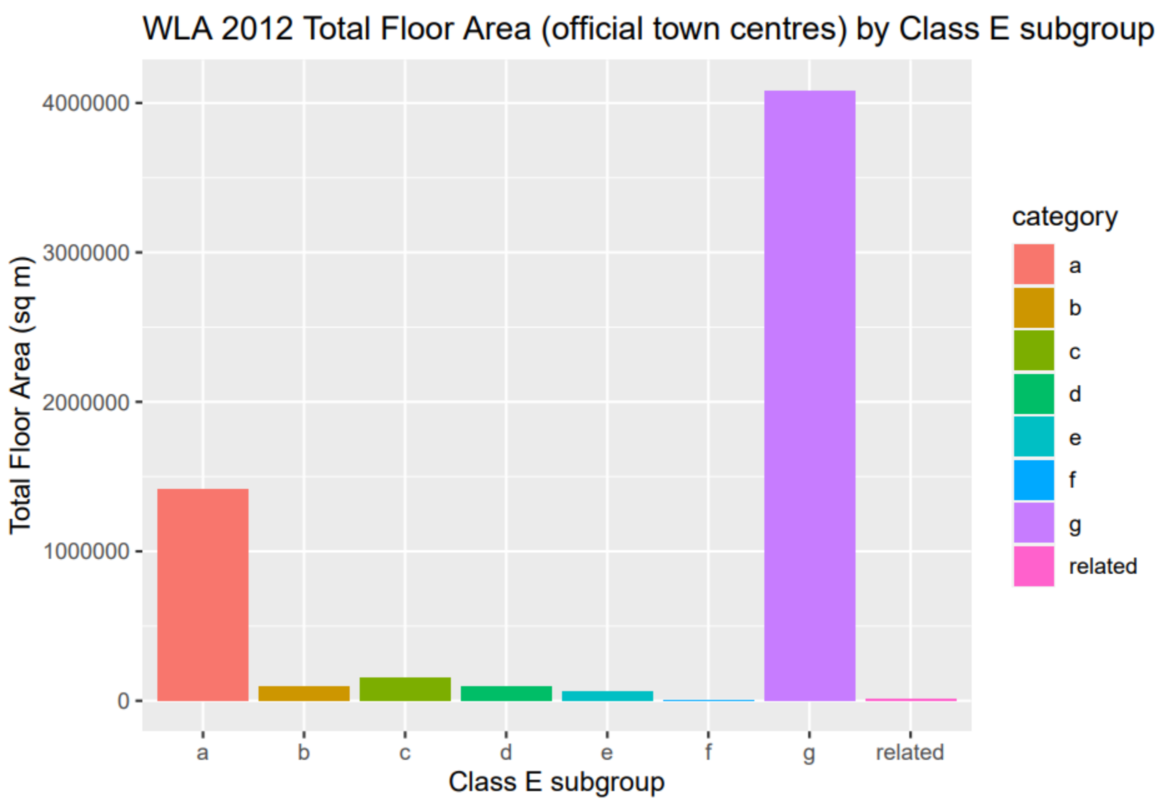
Table 1: Class E sub-groups

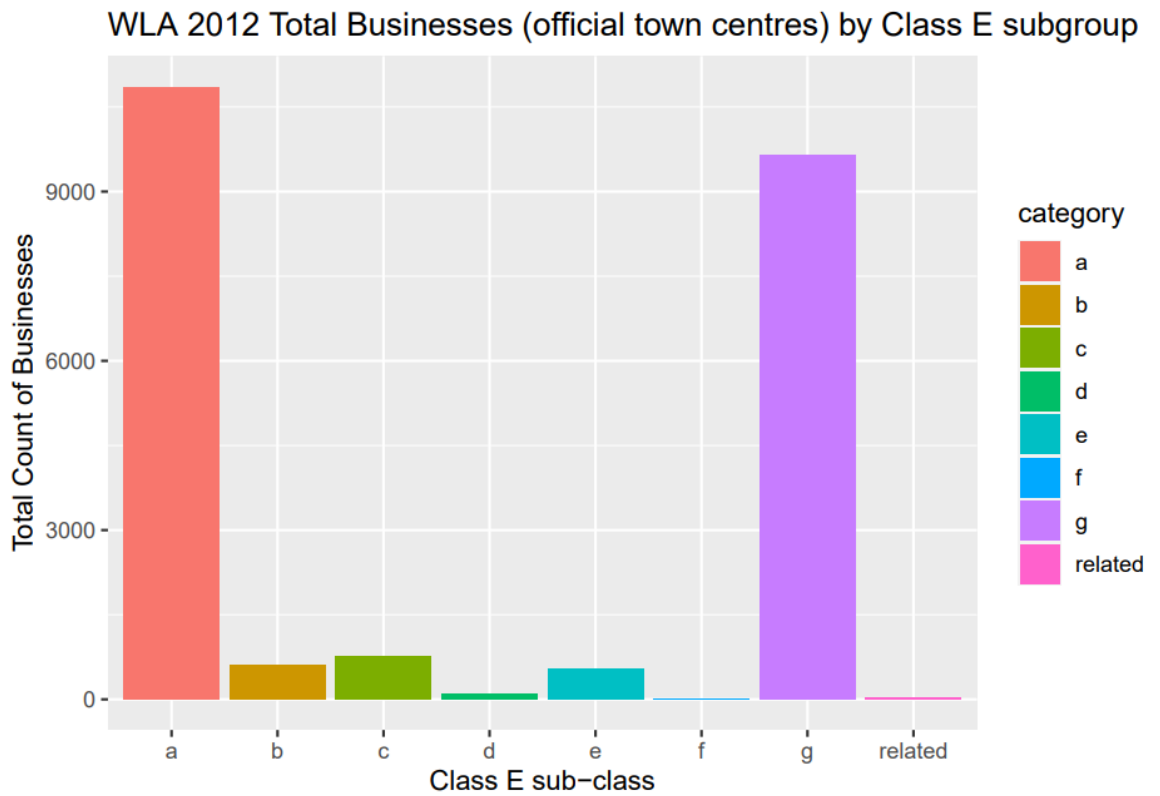
Class E Category	Sub-division	Class	Description
E(a)		Retail	Display or retail sale of goods, other than hot food
E(b)		Food	Sale of food and drink for consumption (mostly) on the premises
E(c)		Services	Provision of Services:
	(i)		Financial services,
	(ii)		Professional services (other than health or medical services), or
	(iii)		Other appropriate services in a commercial, business or service locality
E(d)		Sport&Rec	Indoor sport, recreation or fitness (not involving motorised vehicles or firearms or use as a swimming pool or skating rink,)
E(e)		Medical	Provision of medical or health services (except the use of premises attached to the residence of the consultant or practitioner)
E(f)		Nursery	Creche, day nursery or day centre (not including a residential use)
E(g)		Office	Uses which can be carried out in a residential area without detriment to its amenity:
	(i)		Offices to carry out any operational or administrative functions,
	(ii)		Research and development of products or processes
	(iii)		Industrial processes
Related Sui Generis		Related	Including Takeaway Food Outlet (Predominantly Off Premises), cinemas, drive in restaurant, drive through restaurant, bingo hall, concert hall

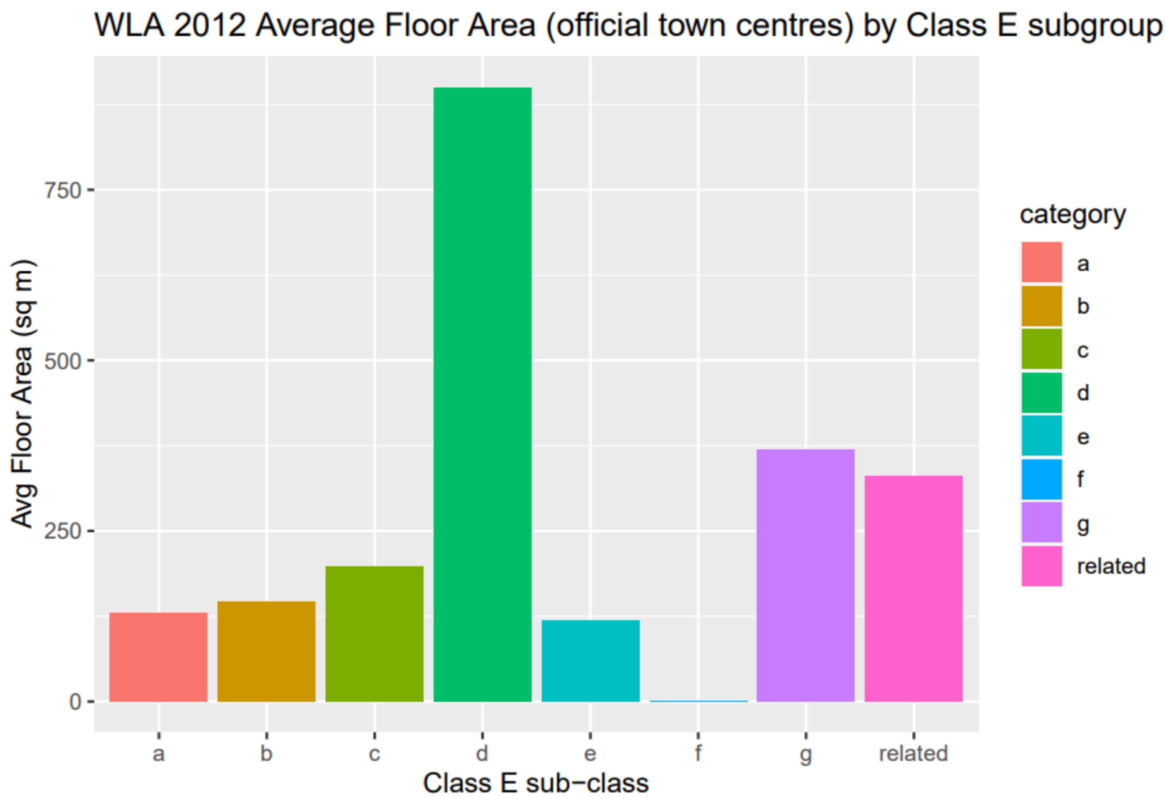
2012 Statistics

Table 2: 2012 Summary Statistics by Class E sub-class, official Town Centre Areas

Category	Official total floor area (m²)	Official count	Official average floor area (m²)
A	1,411,943	10,859	128.9
B	93,136	620	146.1
C	150,867	757	198.4
D	96,031	96	900.4
E	64,960	553	119.5
F	0	0	0.0
G	4,084,526	9,657	370.1
Related	11,448	33	329.7
NA	5,945,447	22,633	239.6



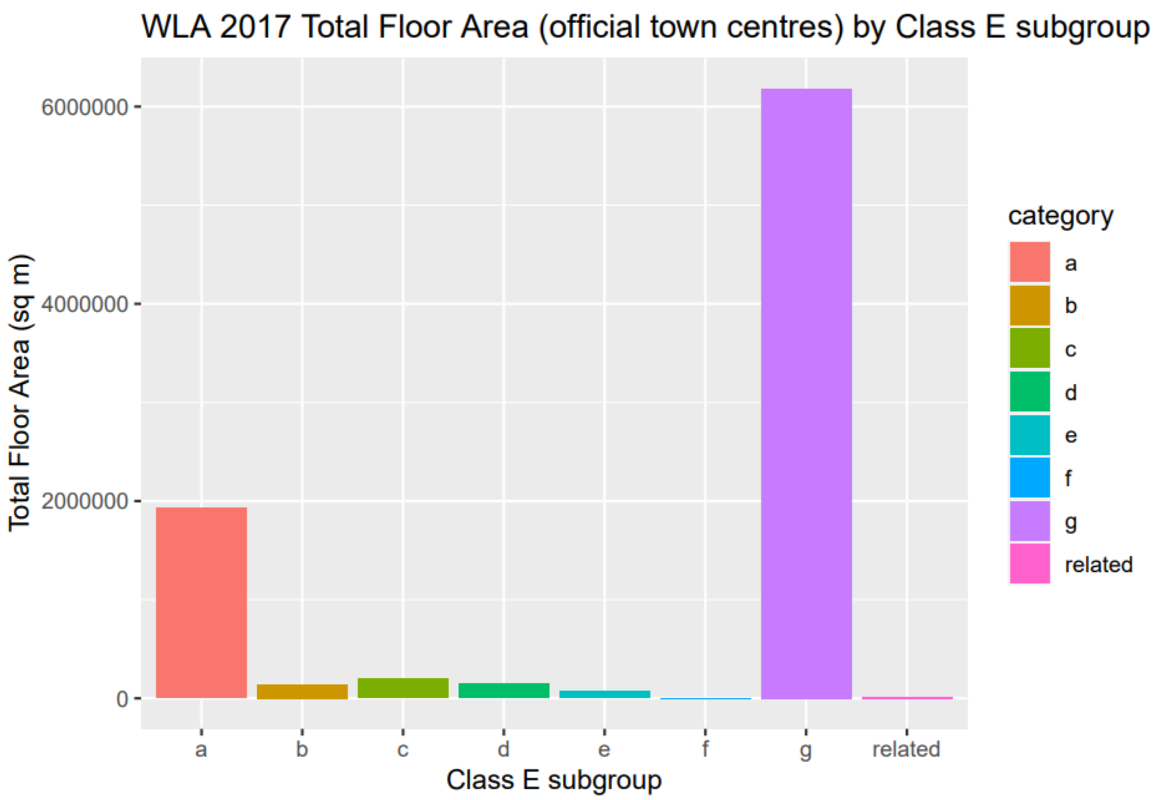

WLA 2012 Total Businesses (official town centres) by Class E subgroup
Total Count of Businesses
9000
6000
3000
0
a
b
c
d
e
f
g
related
Class E sub−class
category
a
b
c
d
e
f
g
related

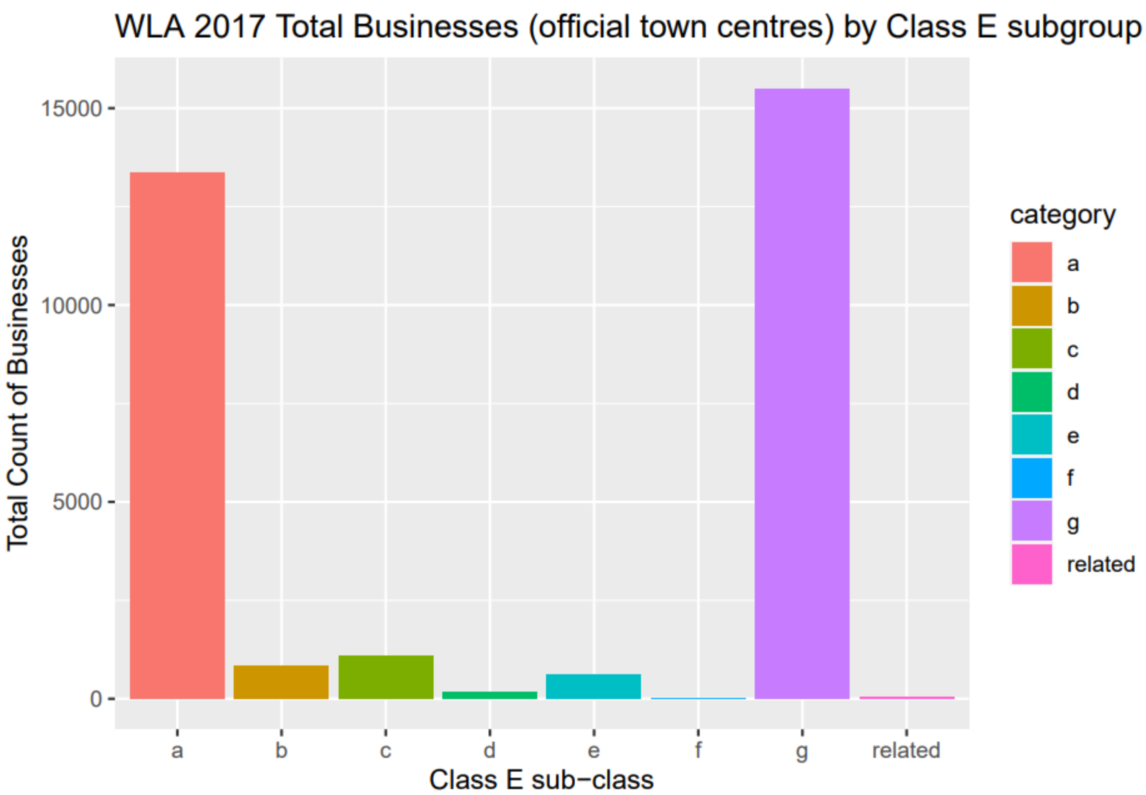

WLA 2012 Average Floor Area (official town centres) by Class E subgroup
Avg Floor Area (sq m)
750
500
250
0
a
b
c
d
e
f
g
related
Class E sub−class
category
a
b
c
d
e
f
g
related

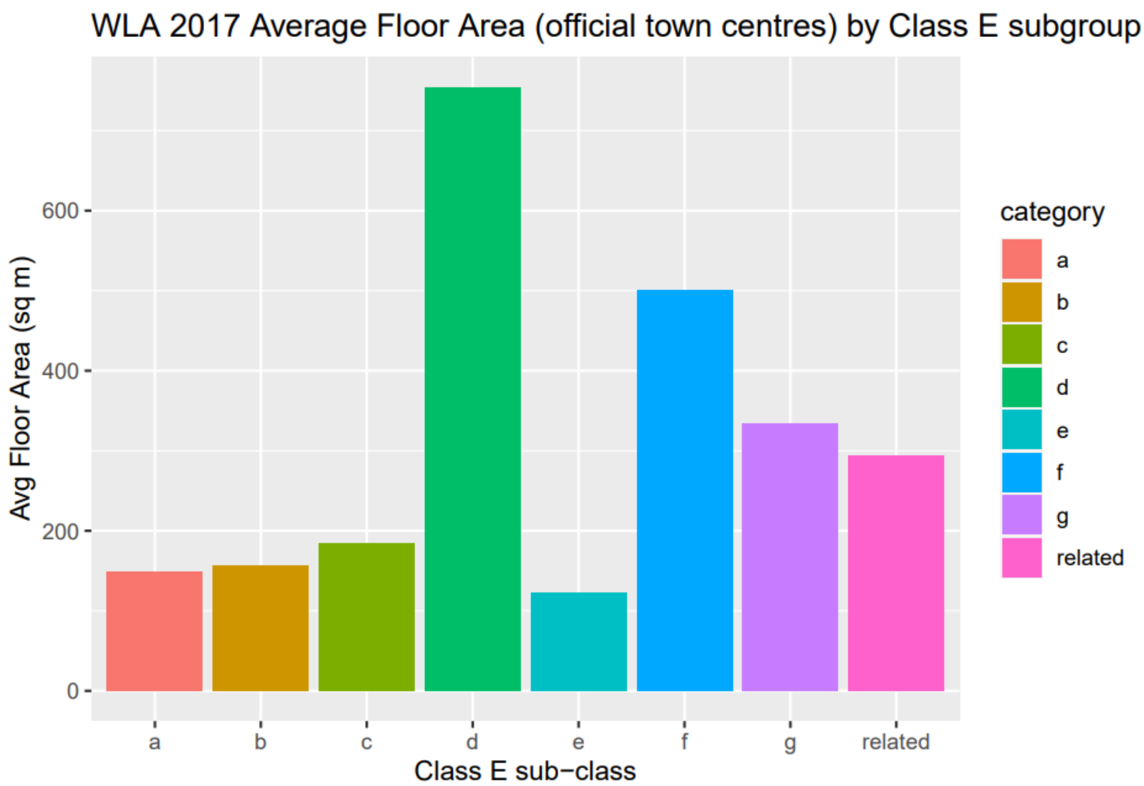
2017 Statistics

Table 3: 2017 Summary Statistics by Class E sub-class, official Town Centre Areas

A	1,930,870	13,364	148.3
B	140,753	841	156.4
C	195,262	1,098	184.2
D	149,179	170	754.5
E	75,362	631	123.3
F	500	1	500.1
G	6,183,101	15,505	333.7
Related	14,907	54	294.1
NA	8,727,167	31,716	243.2



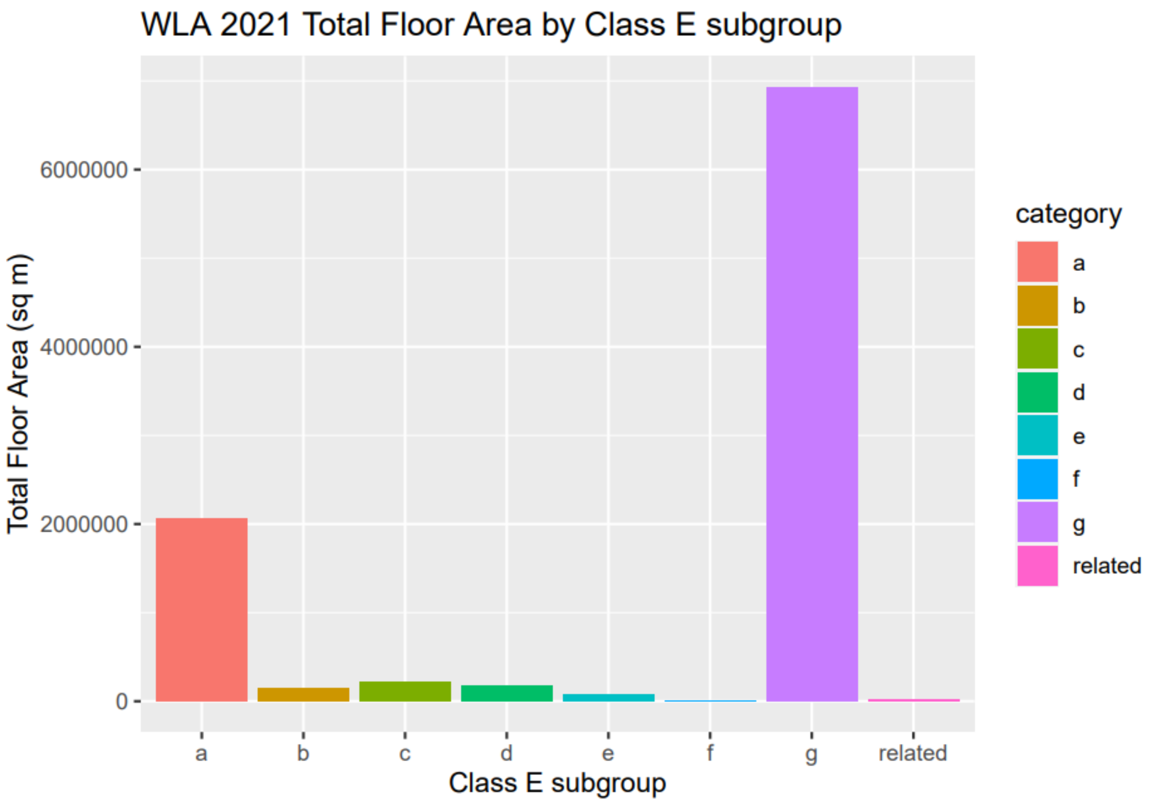

WLA 2017 Total Businesses (official town centres) by Class E subgroup
Total Count of Businesses
15000
10000
5000
0
a
b
c
d
e
f
g
related
Class E sub−class
category
a
b
c
d
e
f
g
related

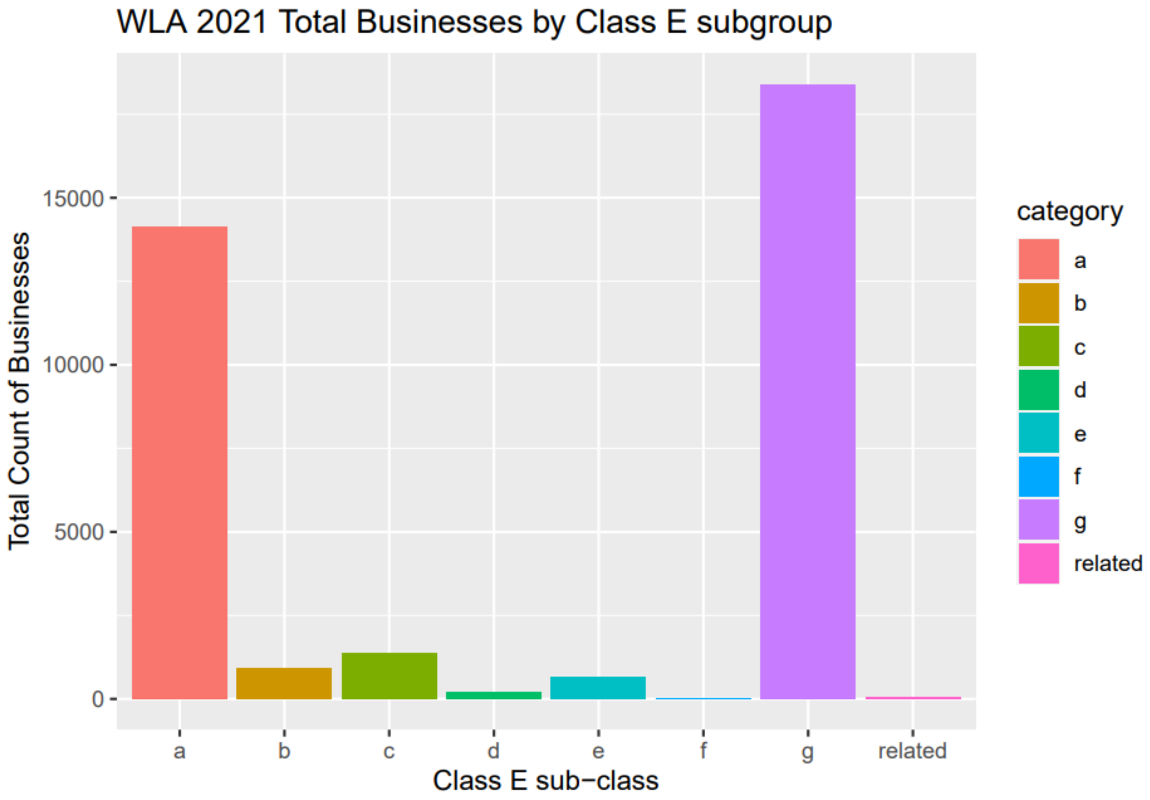

WLA 2017 Average Floor Area (official town centres) by Class E subgroup
Avg Floor Area (sq m)
600
400
200
0
a
b
c
d
e
f
g
related
Class E sub−class
category
a
b
c
d
e
f
g
related

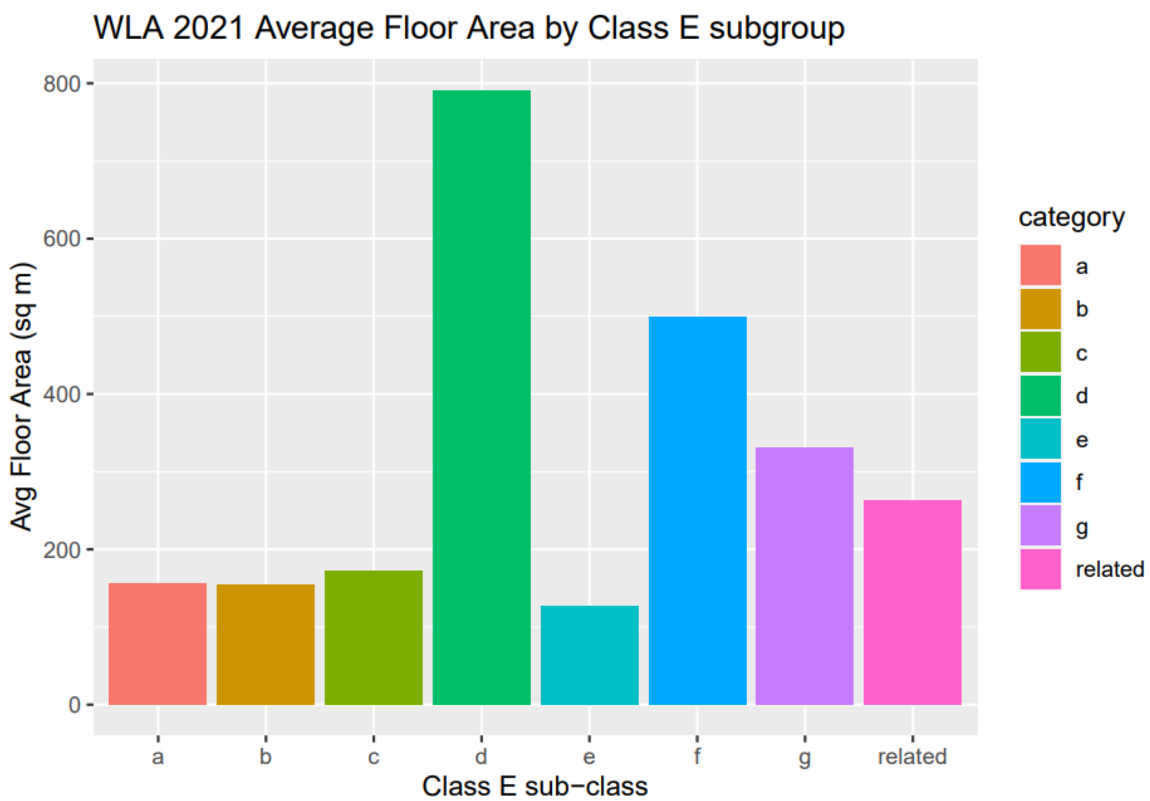
2021 Statistics

Table 4: 2021 Summary Statistics by Class E sub-class, official Town Centre Areas

A	2,068,268	14,134	155.7
B	151,931	908	155.2
C	214,904	1,382	173.0
D	178,691	204	791.4
E	79,474	647	127.5
F	500	1	500.1
G	6,935,123	18,404	330.4
Related	17,538	65	263.3
NA	9,666,964	35,787	240.5




WLA 2021 Total Businesses by Class E subgroup
Total Count of Businesses
15000
10000
5000
0
a
b
c
d
e
f
g
related
Class E sub−class
category
a
b
c
d
e
f
g
related

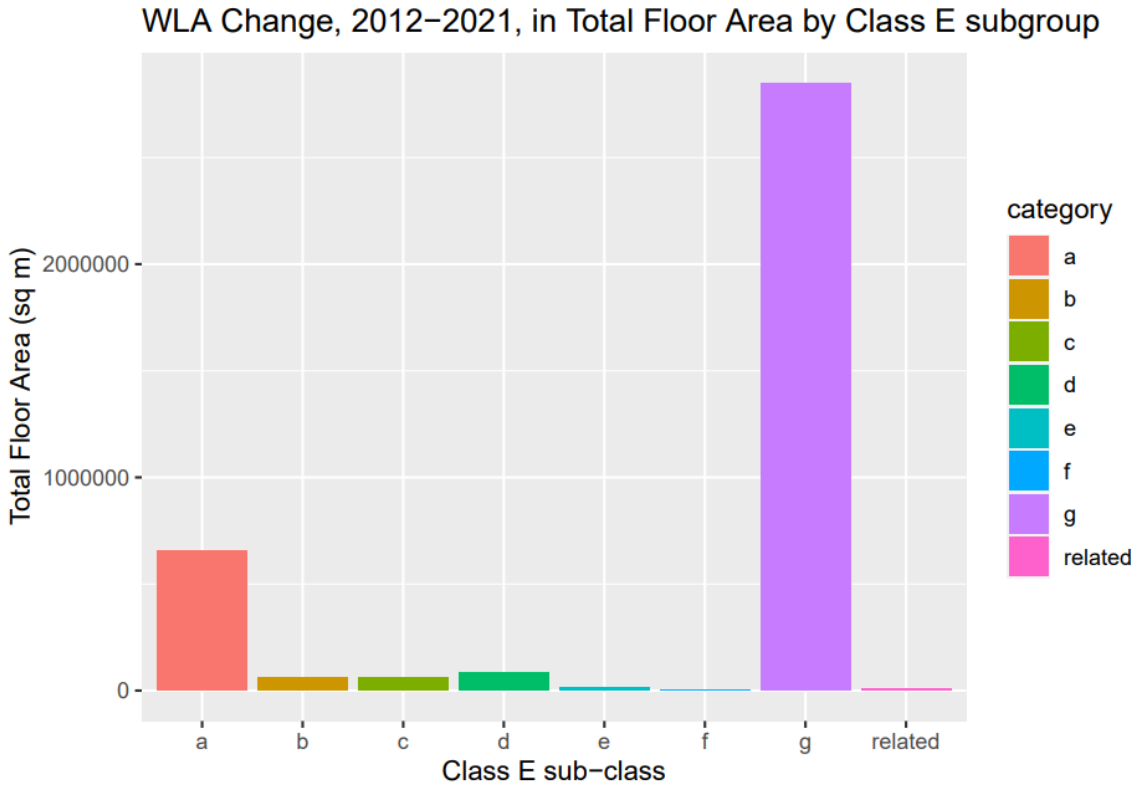

WLA 2021 Average Floor Area by Class E subgroup
Avg Floor Area (sq m)
800
600
400
200
0
a
b
c
d
e
f
g
related
Class E sub−class
category
a
b
c
d
e
f
g
related

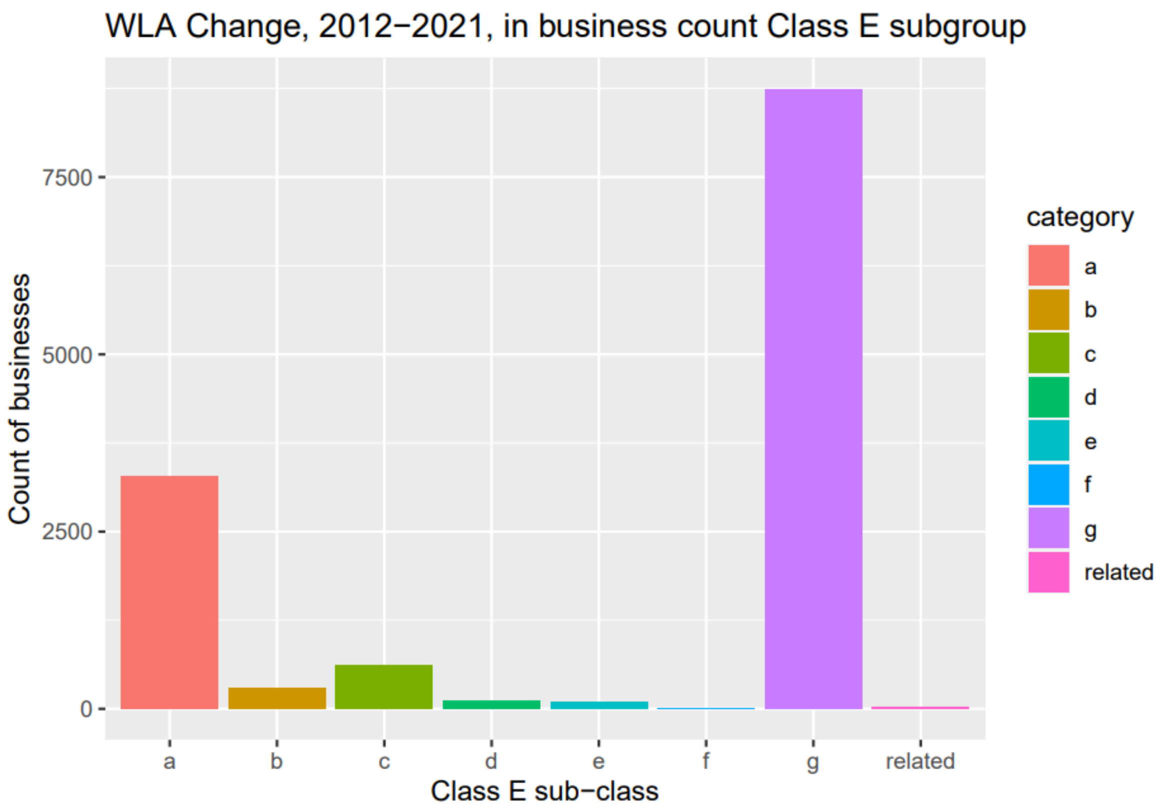
Key Points

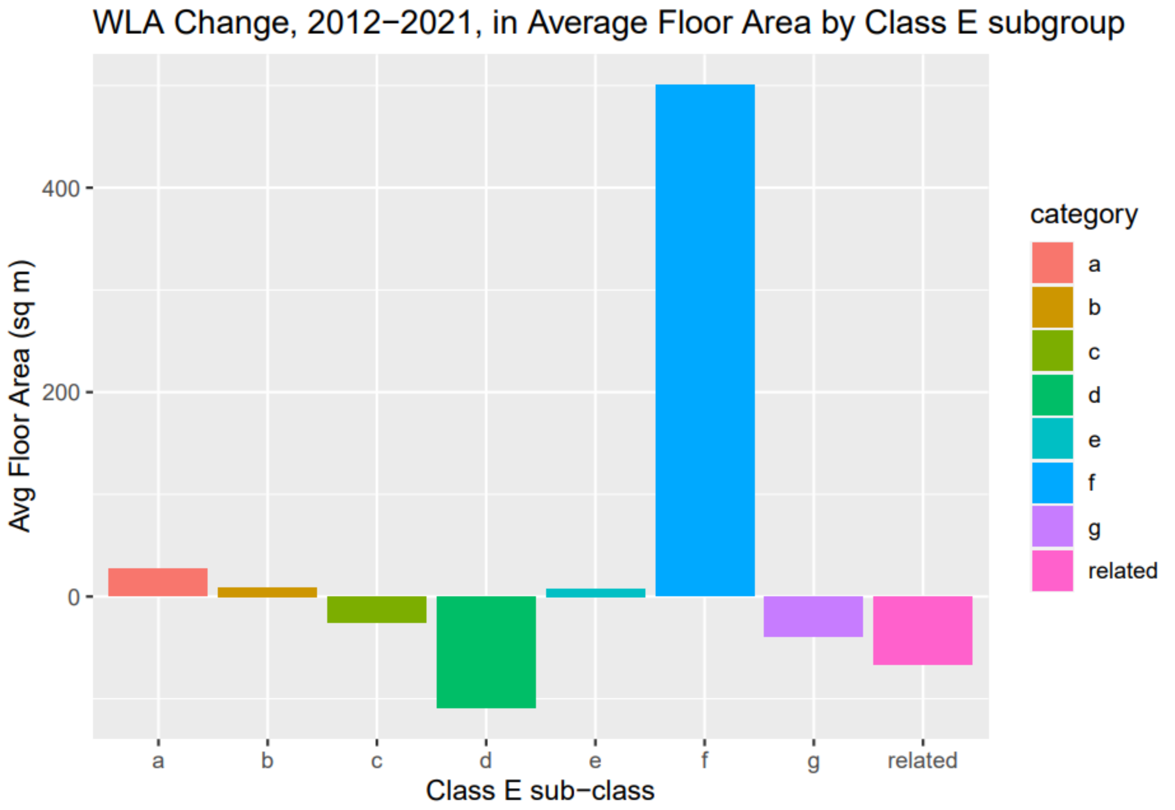
- Retail is the dominant use class (both in terms of floor space and business counts) in Town Centre Areas across the WLA study area with Office closely following. Other use classes are much less prevalent across Town Centre Areas.
- In each town centre, dividing the total floor area by counts of businesses gives an average floor area for each use class. Most activities occupy average floor areas of around 125-150m^2, with the exception of sports and recreation activities.
- Steady growth in both total floor area and number of businesses is evident across the whole WLA area and for all Class E sub-groups

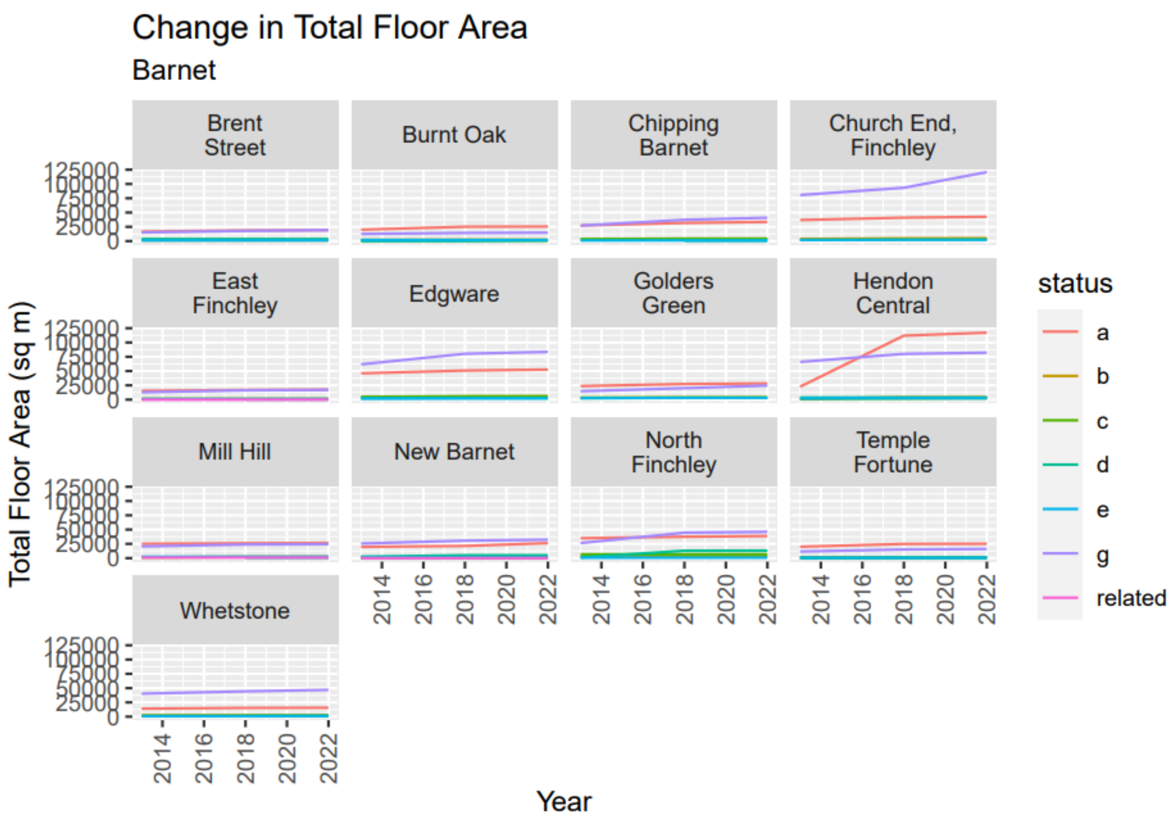
Changes over the 10-year study period

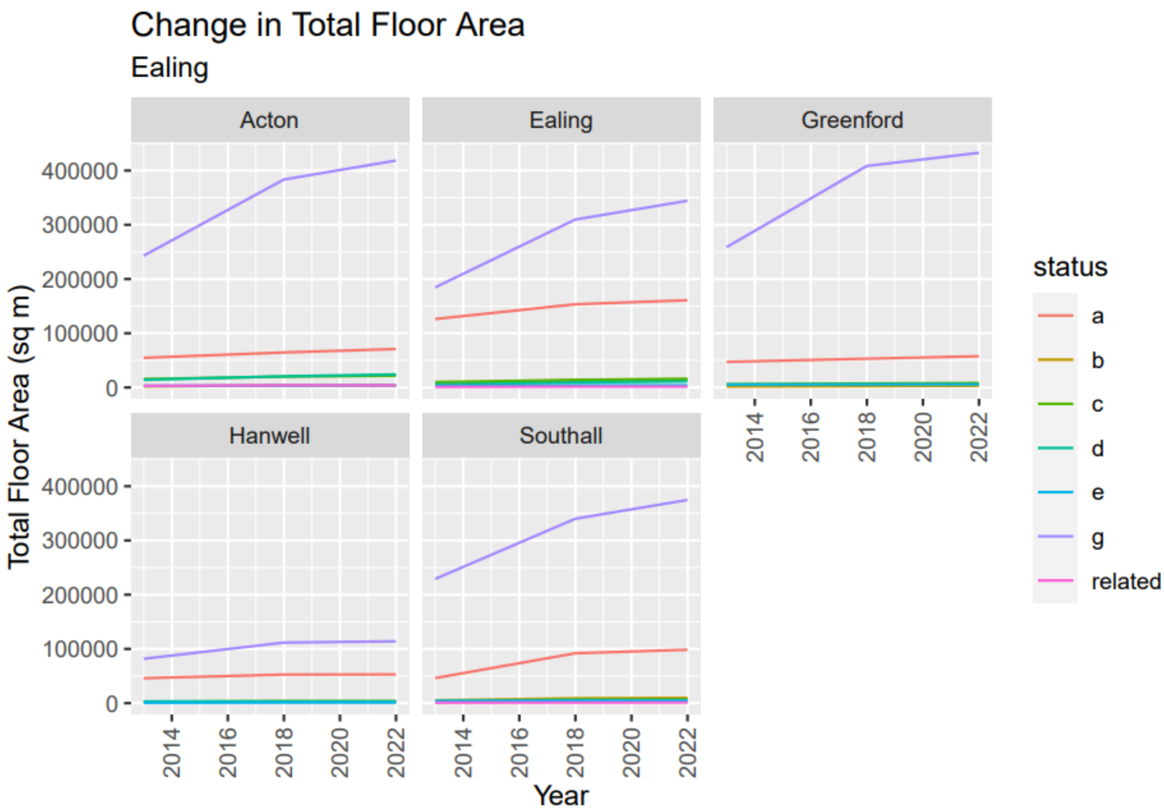
This section presents change statistics from the beginning to the end of the study period.

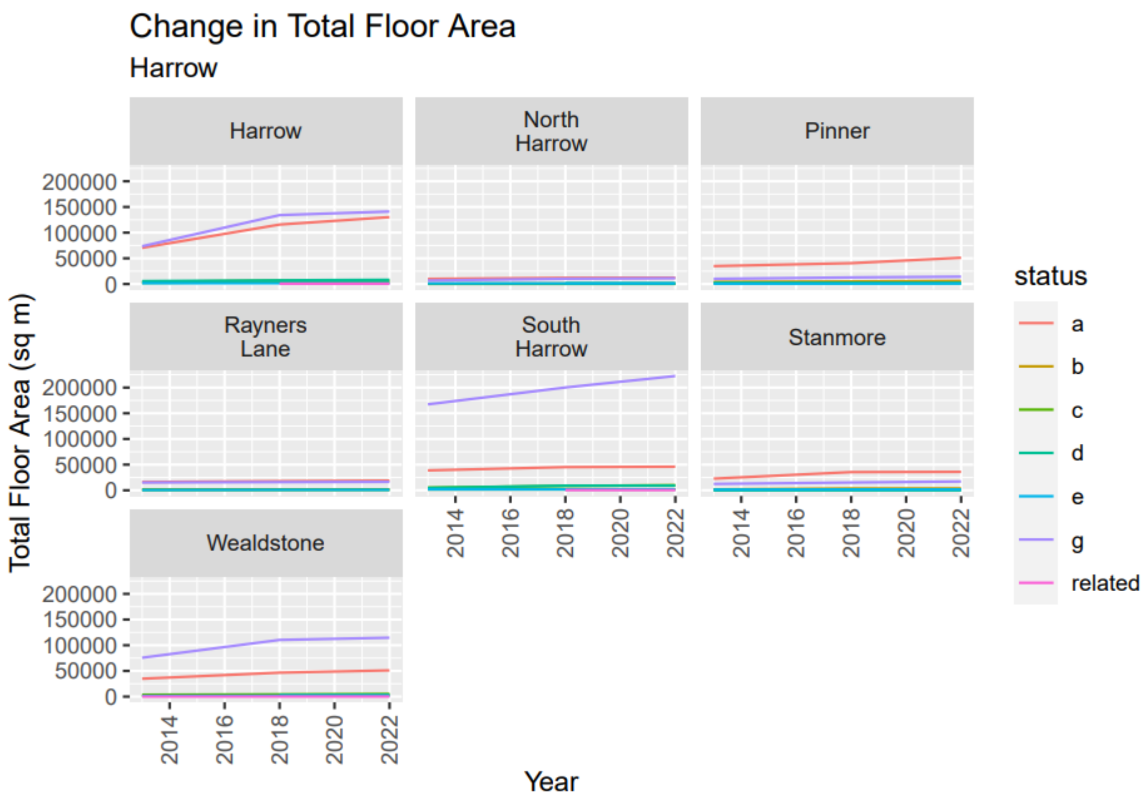


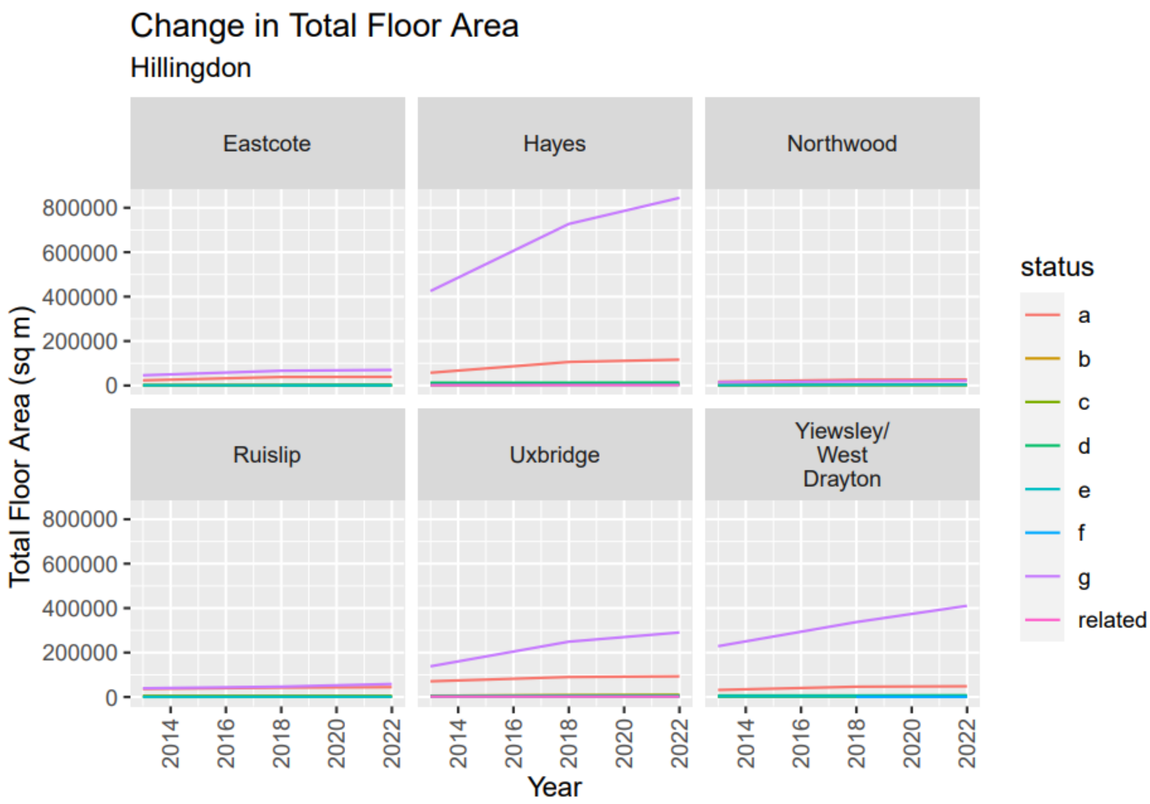



WLA Change, 2012−2021, in Average Floor Area by Class E subgroup
Avg Floor Area (sq m)
400
200
0
a
b
c
d
e
f
g
related
Class E sub−class
category
a
b
c
d
e
f
g
related

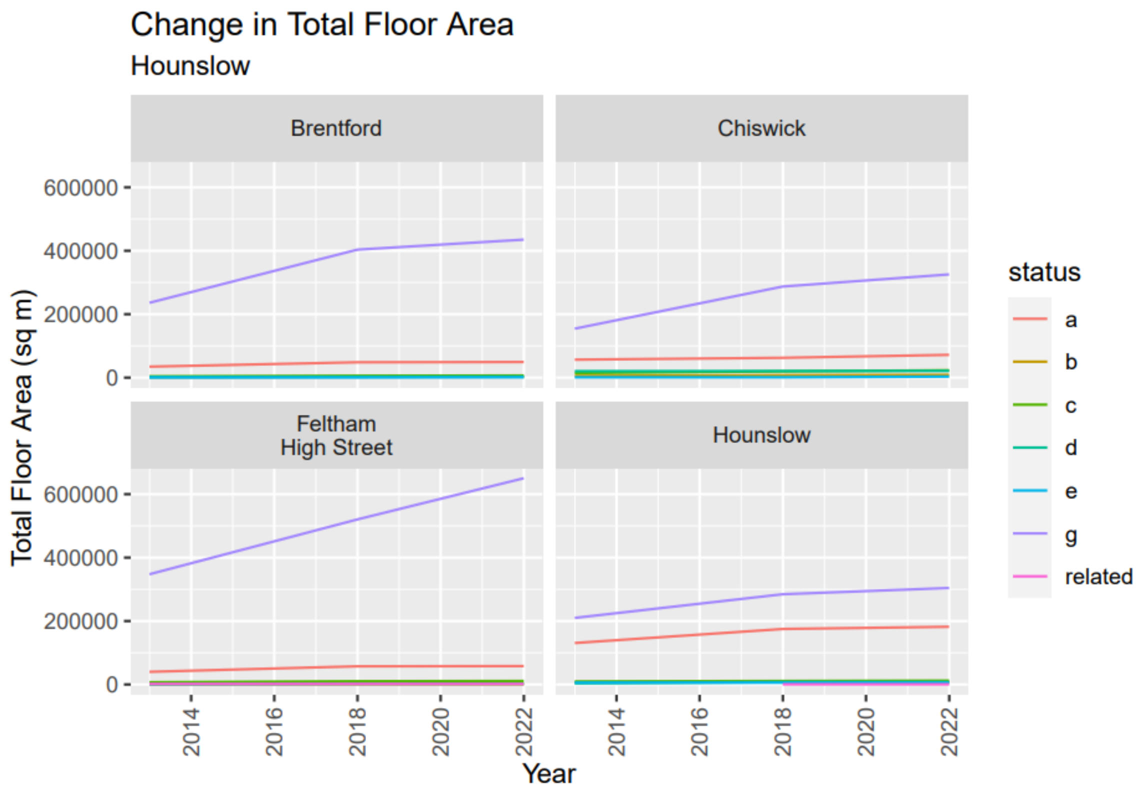

Change in Total Floor Area
Barnet
Brent Street
Burnt Oak
Chipping Barnet
Church End, Finchley
East Finchley
Edgware
Golders Green
Hendon Central
Mill Hill
New Barnet
North Finchley
Temple Fortune
Whetstone
Total Floor Area (sq m)
125000
100000
75000
50000
25000
0
2014
2016
2018
2020
2022
Year
status
a
b
c
d
e
g
related


Change in Total Floor Area
Ealing
Acton
Ealing
Greenford
Hanwell
Southall
Total Floor Area (sq m)
400000
300000
200000
100000
0
2014
2016
2018
2020
2022
Year
status
a
b
c
d
e
g
related


Change in Total Floor Area
Harrow
Harrow
North Harrow
Pinner
Rayners Lane
South Harrow
Stanmore
Wealdstone
Total Floor Area (sq m)
200000
150000
100000
50000
0
2014
2016
2018
2020
2022
Year
status
a
b
c
d
e
g
related

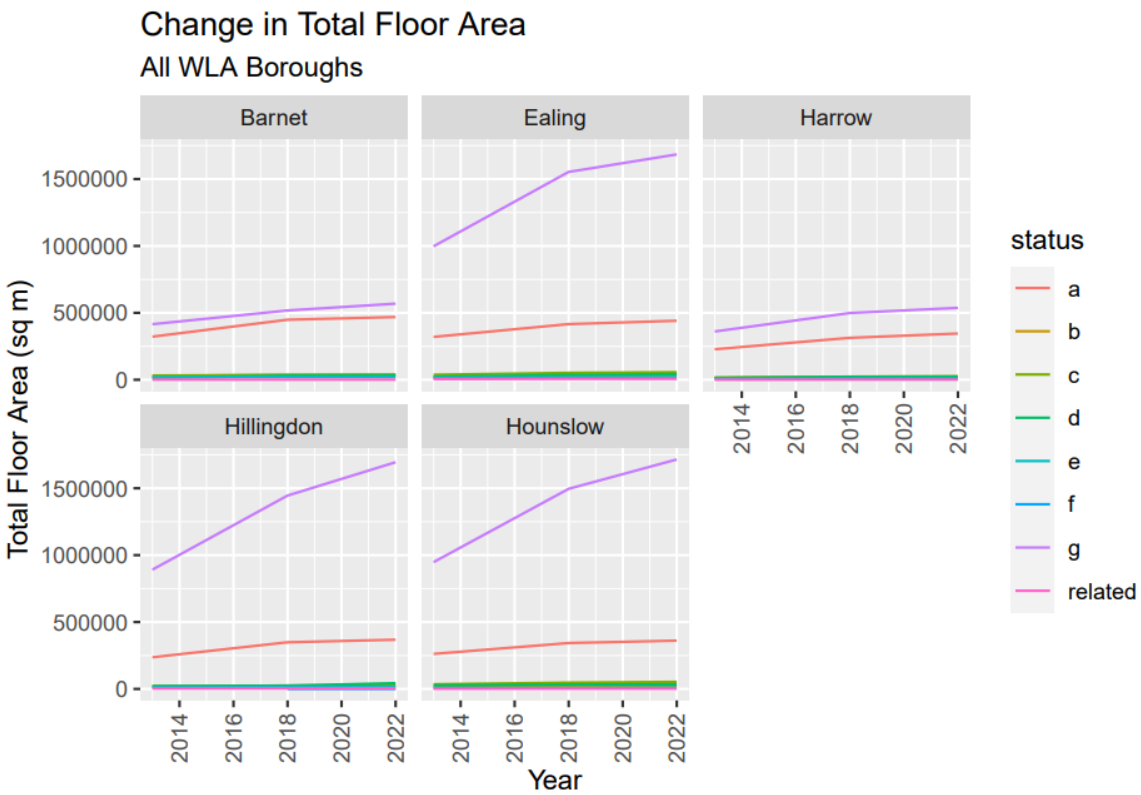


Change in Total Floor Area
Hillingdon
Eastcote
Hayes
Northwood
Ruislip
Uxbridge
Yiewsley/ West Drayton
Total Floor Area (sq m)
800000
600000
400000
200000
0
2014
2016
2018
2020
2022
Year
status
a
b
c
d
e
f
g
related



Change in Total Floor Area
Hounslow
Brentford
Chiswick
Feltham High Street
Hounslow
Total Floor Area (sq m)
600000
400000
200000
0
2014
2016
2018
2020
2022
Year
status
a
b
c
d
e
g
related

Borough Averages



Key Points

- Growth in the total floor area given over to Class E activities is evident across all sub-groups. It is unclear whether this growth is through conversion of existing buildings or new-builds.
- The total number of businesses across all sectors has grown, although the total number of new office-based businesses is the highest.
- Conversely, growth in the number of businesses masks a serious down-sizing of the average floor area of office-based businesses by around 30m^2. Office sub-division to get below tax-paying thresholds is likely driving this trend.
- Overall trends and those at borough level mask significant variation in activities and growth for each Town Centre Area.

Initial Summary Statistics - Occupancy and Vacancy

Table 5 presents the changes in occupancy and vacancy across the whole WLA area between 2012 and 2021.

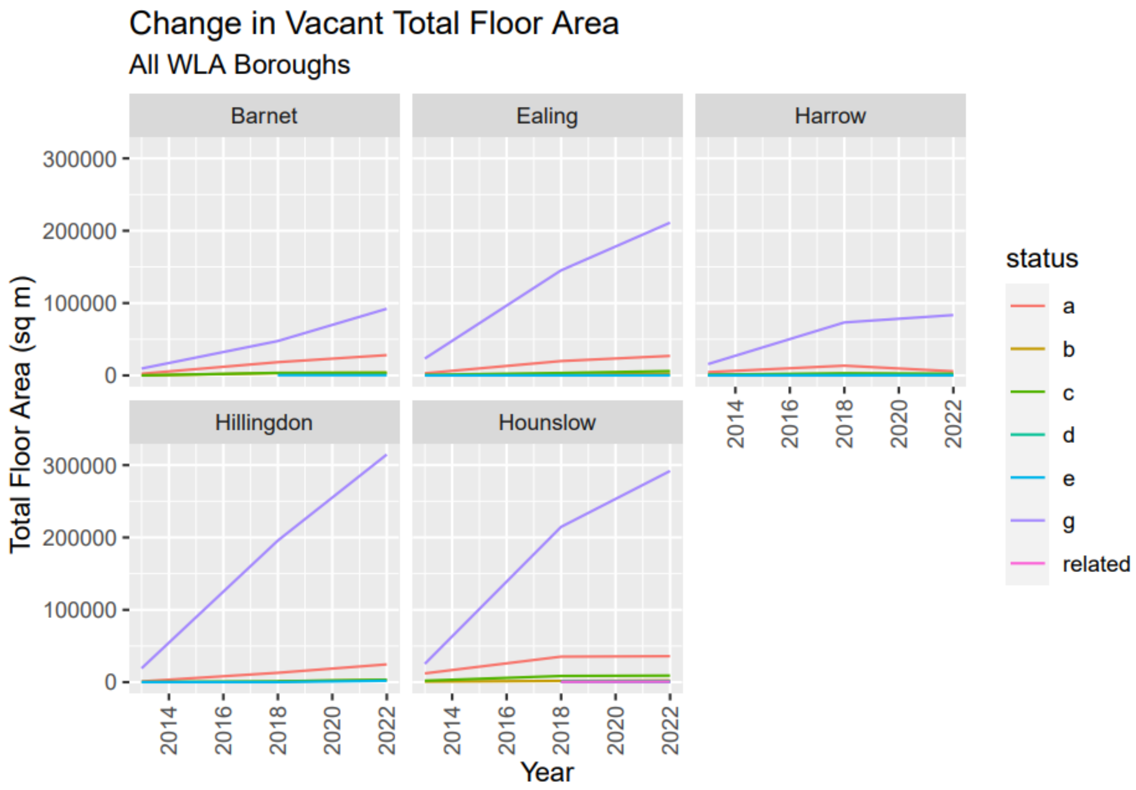
Table 5: Occupancy statistics by Class E sub-class, official Town Centre Areas

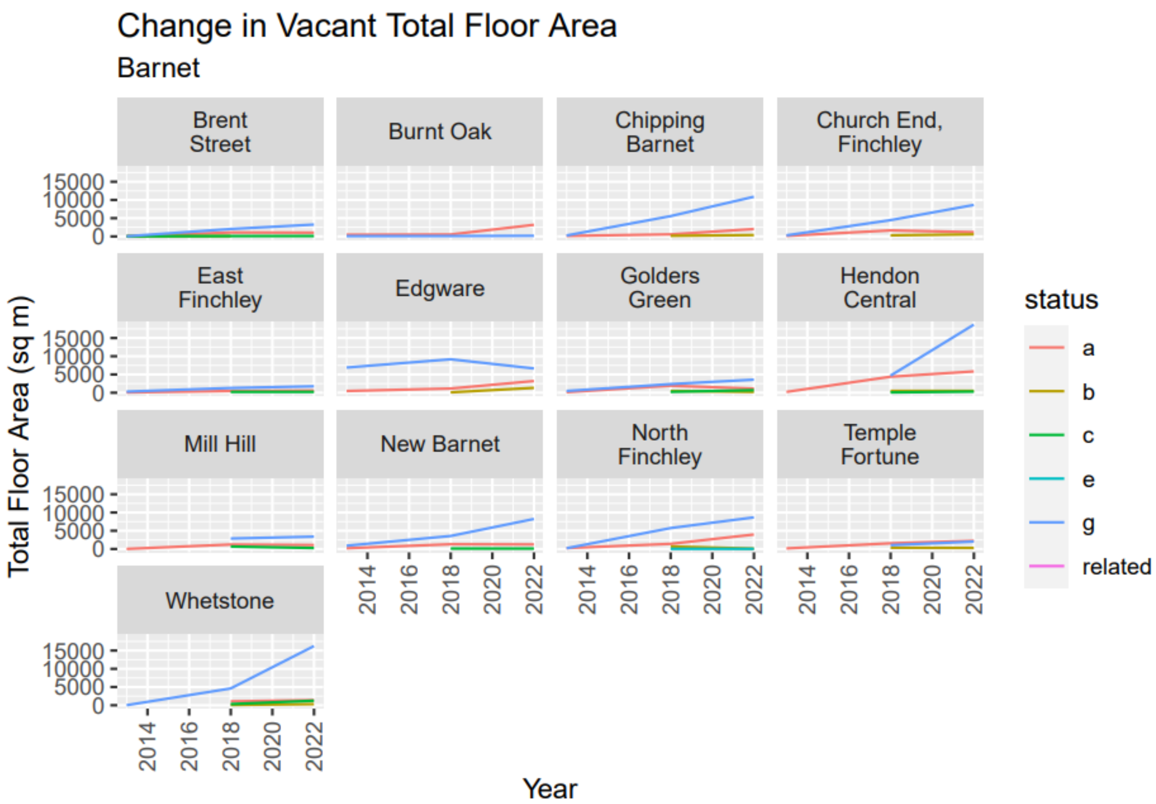
A	2012	1,388,242	10,859	127.1
A	2017	1,829,584	13,364	142.0
A	2021	1,945,347	14,134	147.8
B	2012	91,235	620	142.6
B	2017	132,711	841	146.5
B	2021	136,644	908	140.6
C	2012	146,728	757	194.5
C	2017	175,023	1,098	167.8
C	2021	187,943	1,382	150.9
D	2012	95,130	95	914.2
D	2017	147,879	168	766.2
D	2021	172,151	200	781.7
E	2012	64,189	553	117.8
E	2017	73,769	631	121.0
E	2021	75,694	646	117.4
F	2012	0	0	0.0
F	2017	500	1	500.1
F	2021	500	1	500.1
G	2012	3,980,895	9,657	360.9
G	2017	5,473,089	15,505	298.4
G	2021	5,840,815	18,404	281.8
Related	2012	11,448	33	329.7
Related	2017	13,479	52	259.1
Related	2021	13,435	63	197.6
NA	2012	5,810,403	22,633	234.6
NA	2017	7,881,490	31,716	222.5

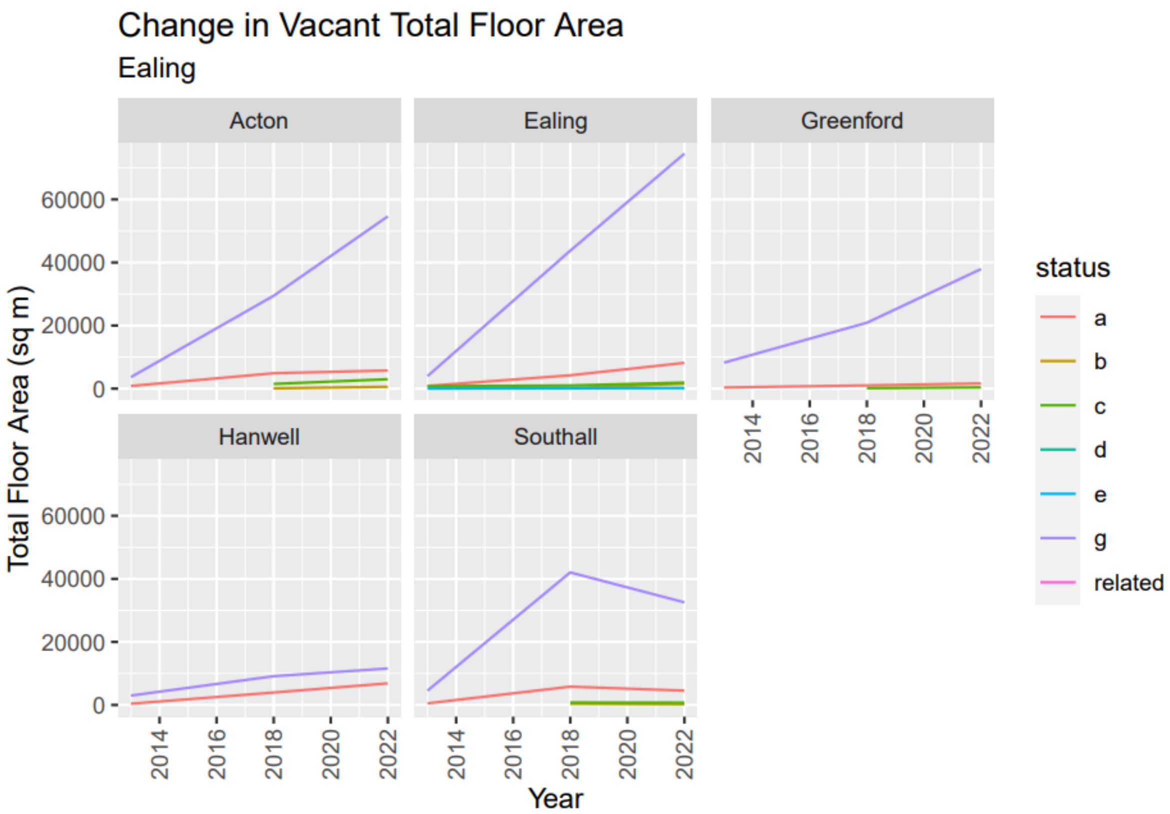
Table 6: Vacancy statistics by Class E sub-class, official Town Centre Areas

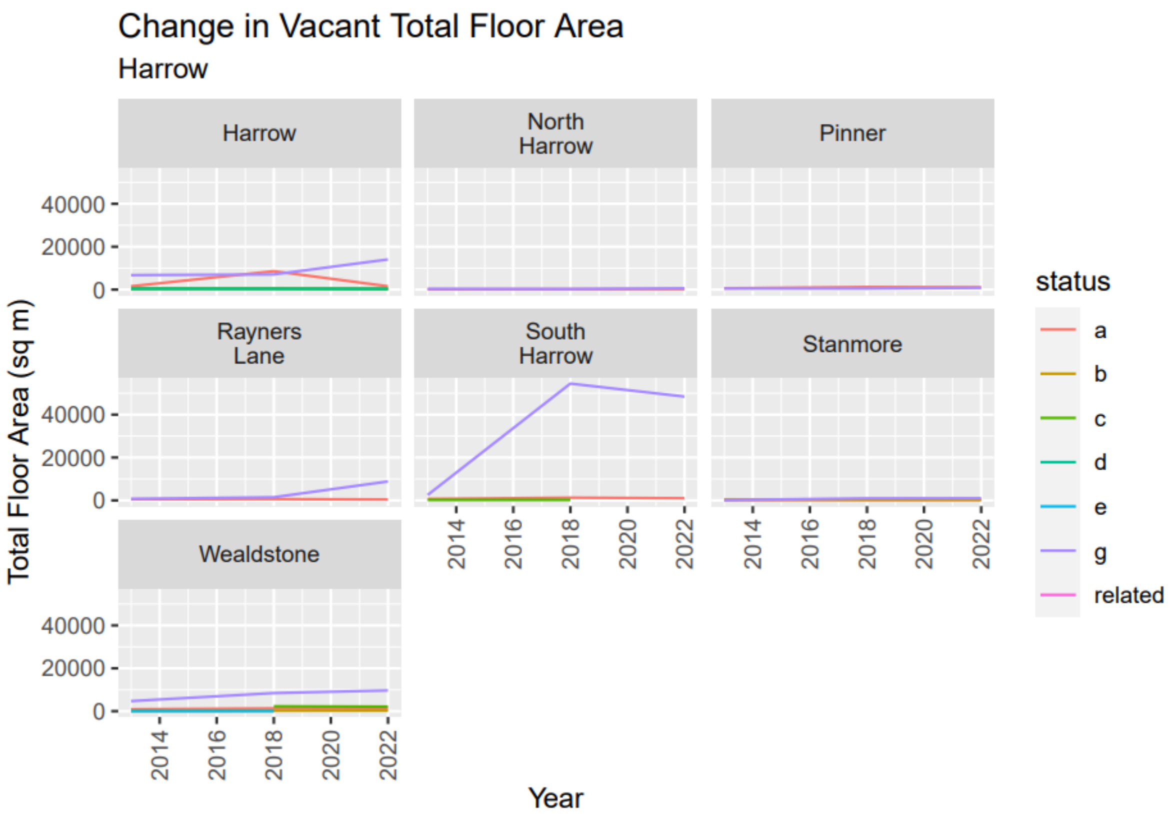
A	2012	23,671	10,094	2.1
A	2017	101,287	13,364	6.3
A	2021	122,921	14,134	7.9
B	2012	1,760	98	19.0
B	2017	7,762	637	13.8
B	2021	15,028	769	19.9
C	2012	3,992	355	14.7
C	2017	20,063	925	24.7
C	2021	26,502	1,207	30.7
D	2012	894	7	297.1
D	2017	1,158	24	108.2
D	2021	3,461	71	59.8
E	2012	191	52	4.7
E	2017	1,019	109	8.3
E	2021	3,477	183	49.1
F	2012	0	0	0.0
F	2017	0	0	0.0
F	2021	0	0	0.0
G	2012	102,861	9,201	10.6
G	2017	710,012	15,489	36.2
G	2021	1,094,135	18,303	51.1
Related	2012	0	0	0.0
Related	2017	1,105	4	276.4
Related	2021	3,735	27	256.8
NA	2012	135,043	22,633	5.0
NA	2017	845,677	31,716	20.7
NA	2021	1,278,642	35,787	29.8

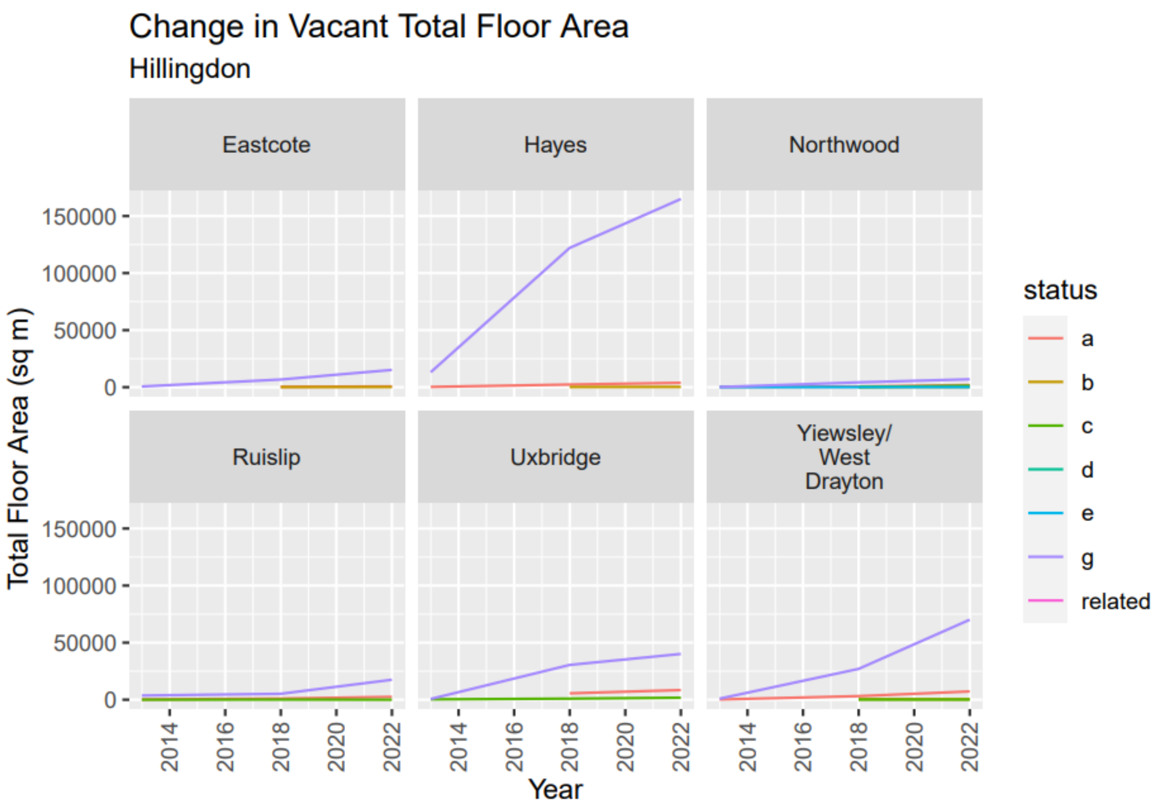
Vacancy over time for each Town Centre Area

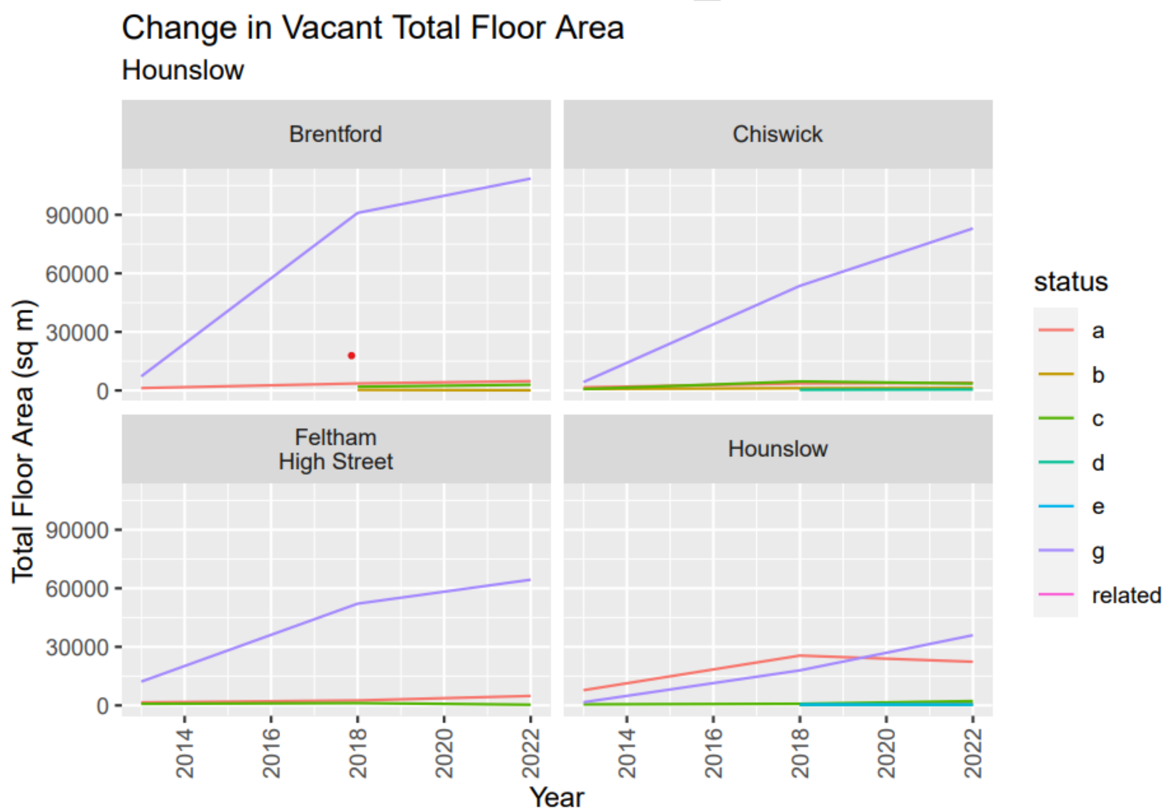





Change in Vacant Total Floor Area
Ealing
Acton
Ealing
Greenford
Hanwell
Southall
60000
40000
20000
0
Total Floor Area (sq m)
2014
2016
2018
2020
2022
Year
status
a
b
c
d
e
g
related


Change in Vacant Total Floor Area
Harrow
Harrow
North Harrow
Pinner
Rayners Lane
South Harrow
Stanmore
Wealdstone
40000
20000
0
Total Floor Area (sq m)
2014
2016
2018
2020
2022
Year
status
a
b
c
d
e
g
related

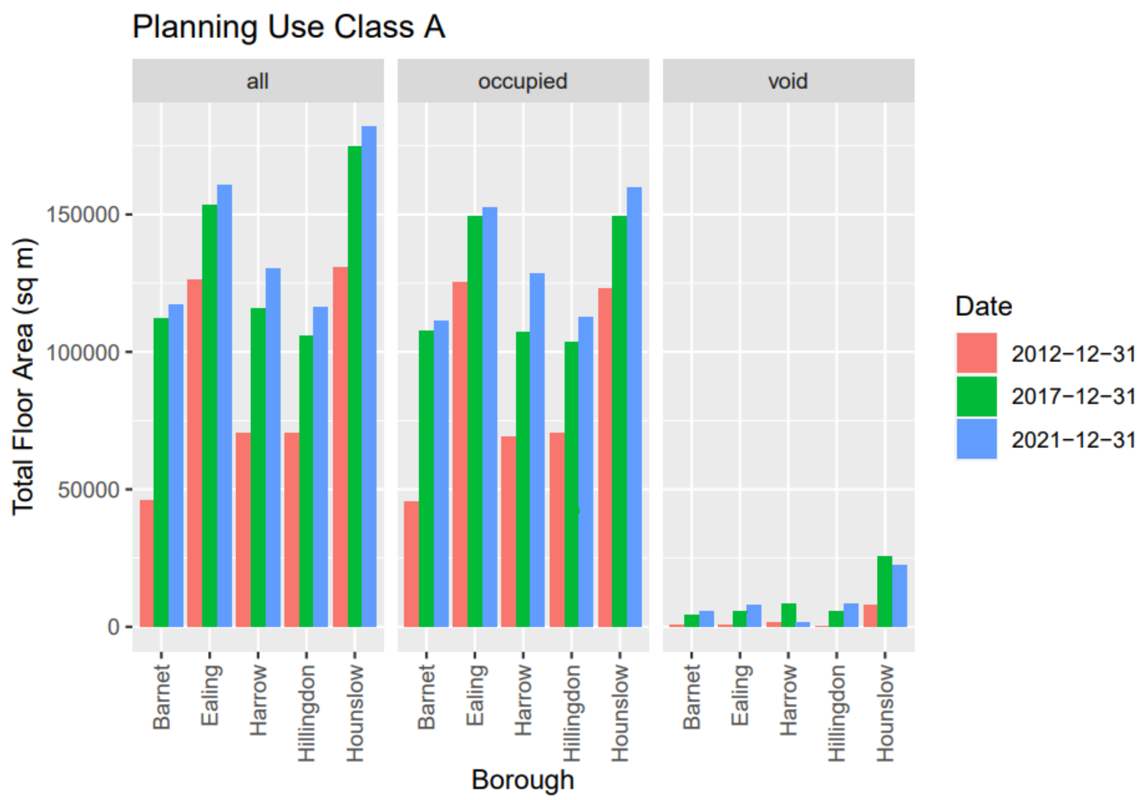

Change in Vacant Total Floor Area
Hillingdon
Eastcote
Hayes
Northwood
Ruislip
Uxbridge
Yiewsley/ West Drayton
Total Floor Area (sq m)
150000
100000
50000
0
2014
2016
2018
2020
2022
Year
status
a
b
c
d
e
g
related

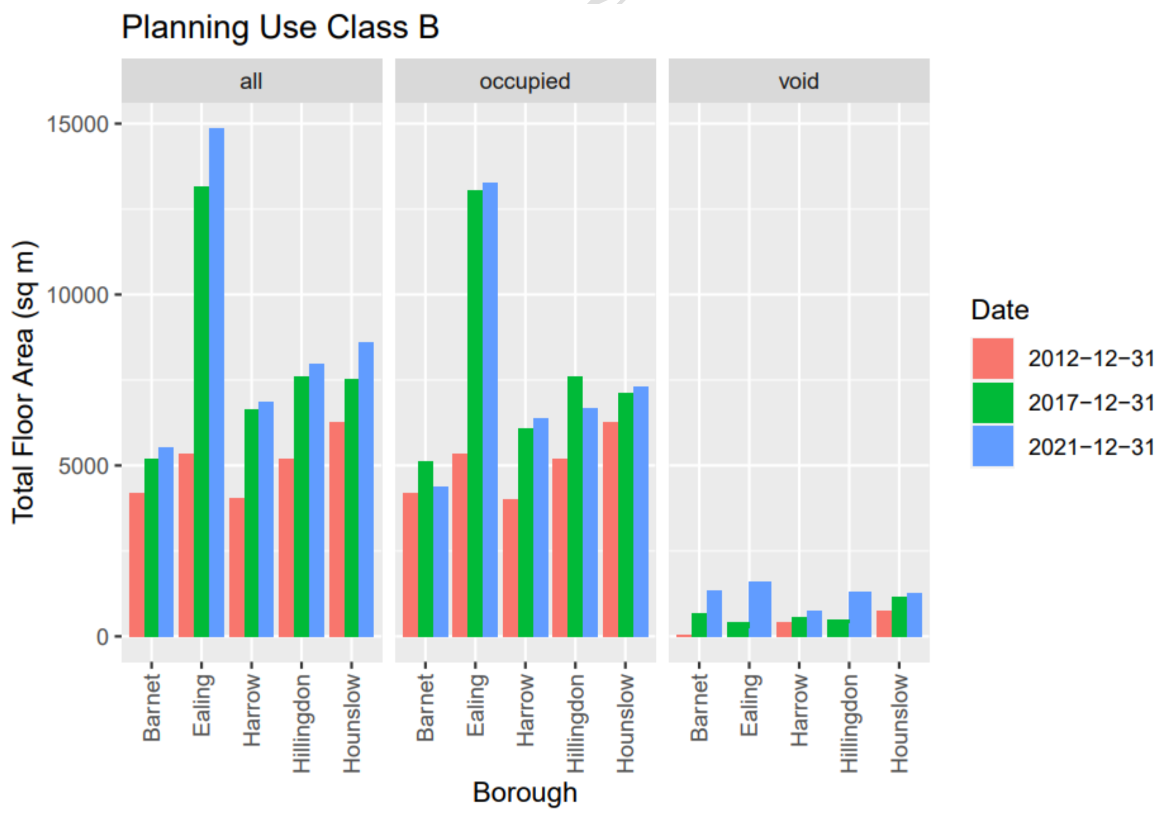

Change in Vacant Total Floor Area
Hounslow
Brentford
Chiswick
Feltham High Street
Hounslow
Total Floor Area (sq m)
90000
60000
30000
0
2014
2016
2018
2020
2022
Year
status
a
b
c
d
e
g
related

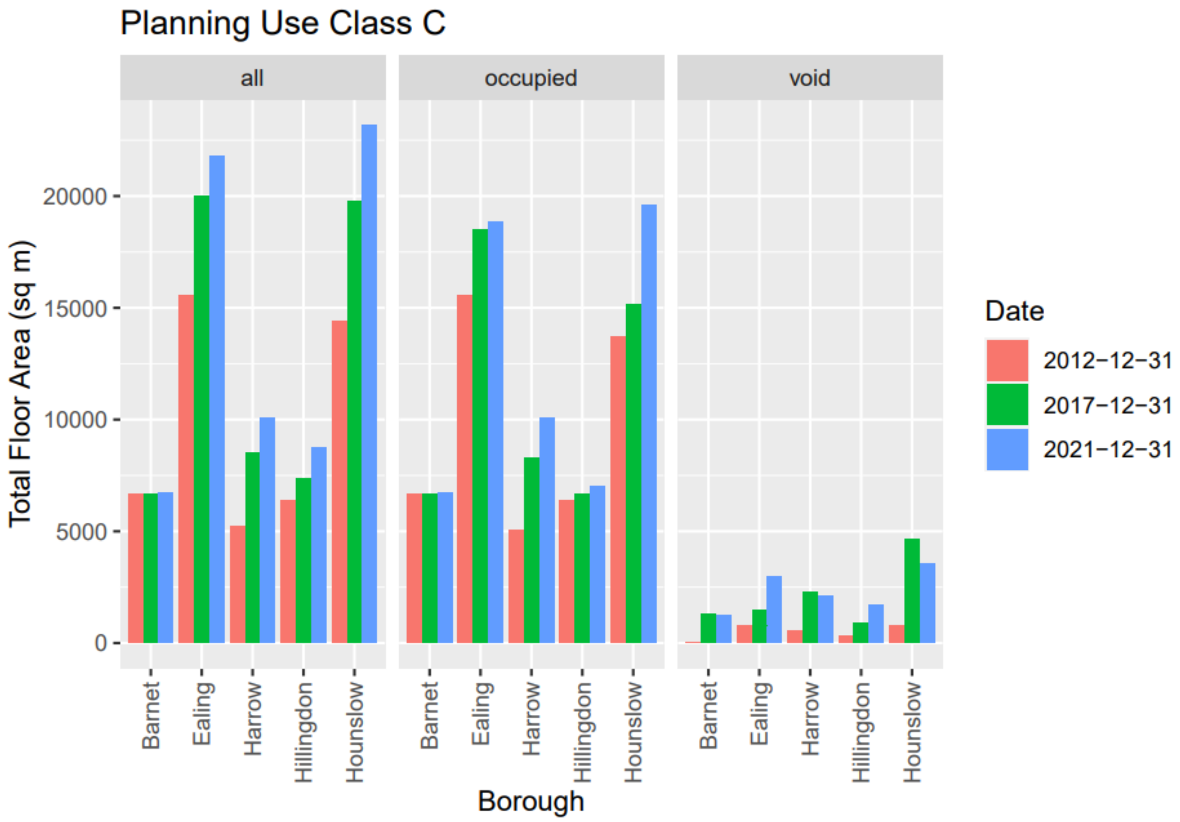
Key Points

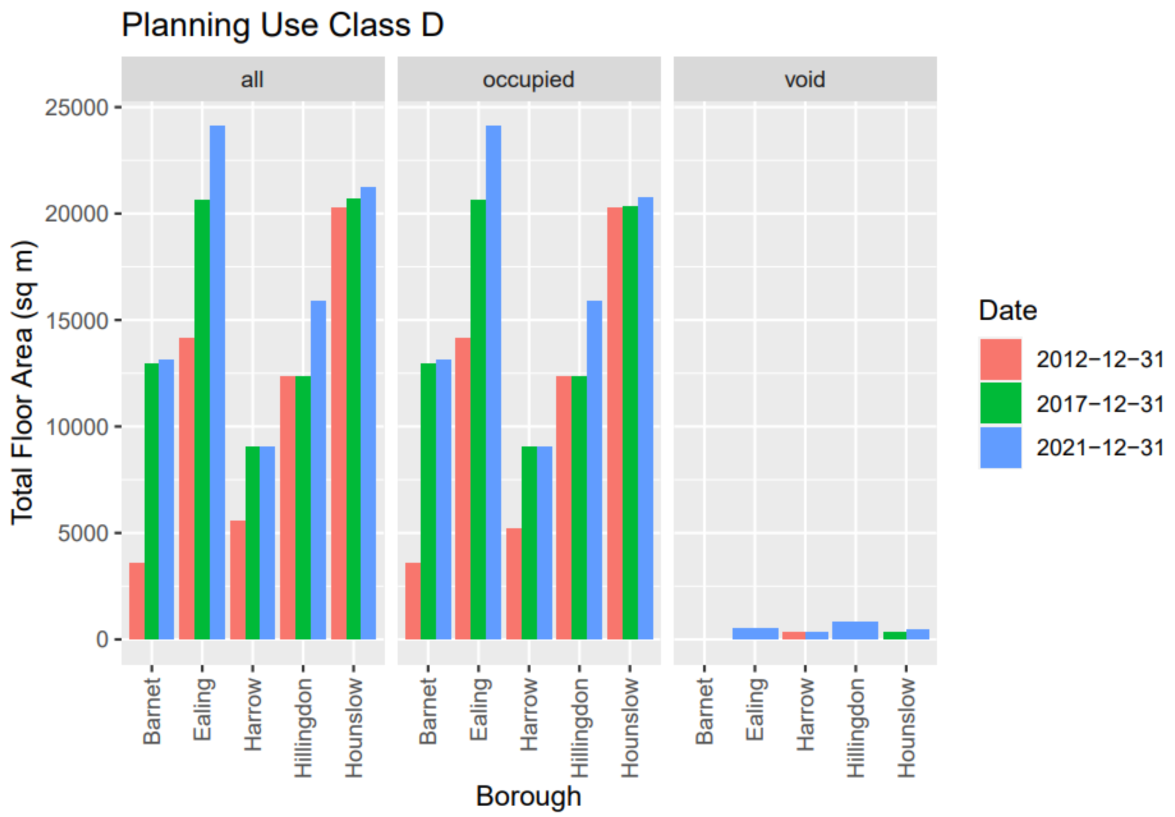
- Growth in overall floor space and counts of business premises in Town Centre Areas across the WLA area masks the fact that much of that growth is in premises that remain vacant.
- Taking retail and office premises, most of the growth occurred between 2012 and 2017, with a slowing in growth to 2021.
- The average floor areas of most occupied premises have remained relatively static across most sub-class groups, however occupied office space has reduced in size from an average of around 170m^2 to 113 m^2.
- Growth in vacant retail and, in particular, office space is quite dramatic over the 10-year period.
- Vacant spaces are on average quite small, however the size of vacant commercial space has increased across the board with the average vacant office space now at just over 30m^2, up from around 10m^2 in 2012.
- At the borough and town centre levels, growth in vacant office space is driving vacancy rates in many place, particularly in Ealing where Ealing Town Centre itself shows a huge growth in vacant office space.

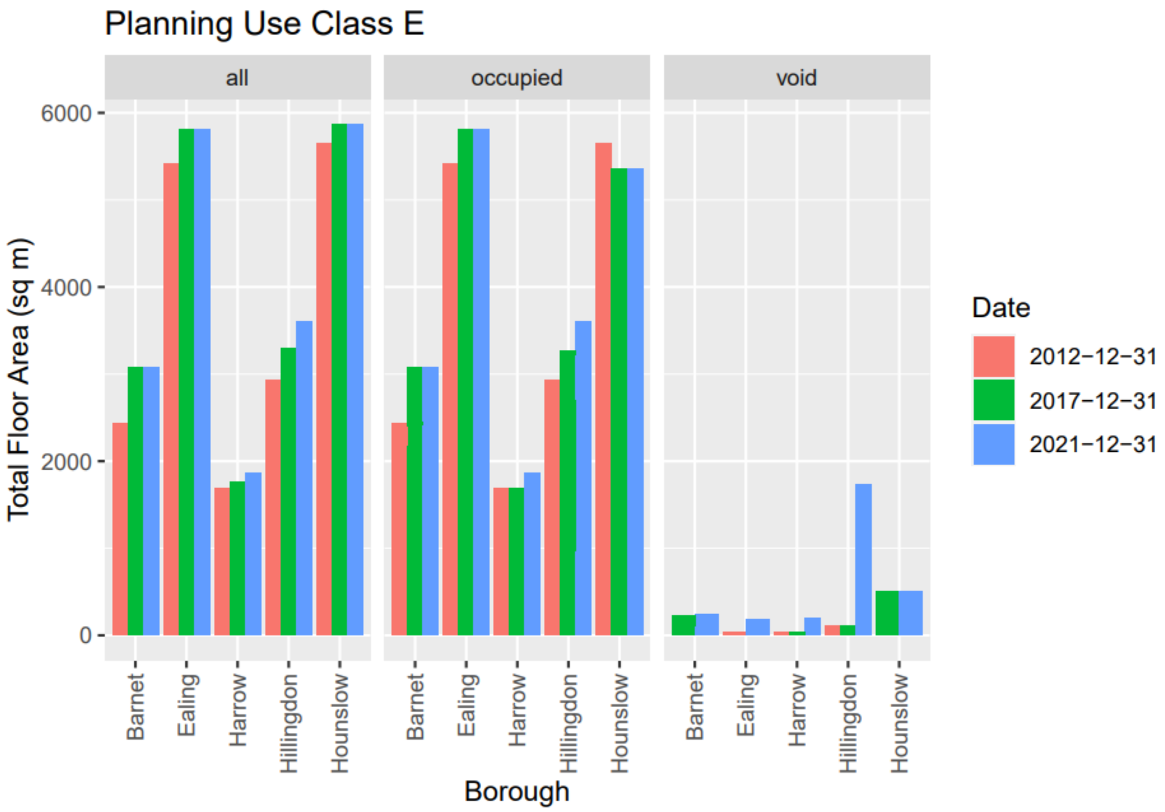
Planning Use Class Change Over Time

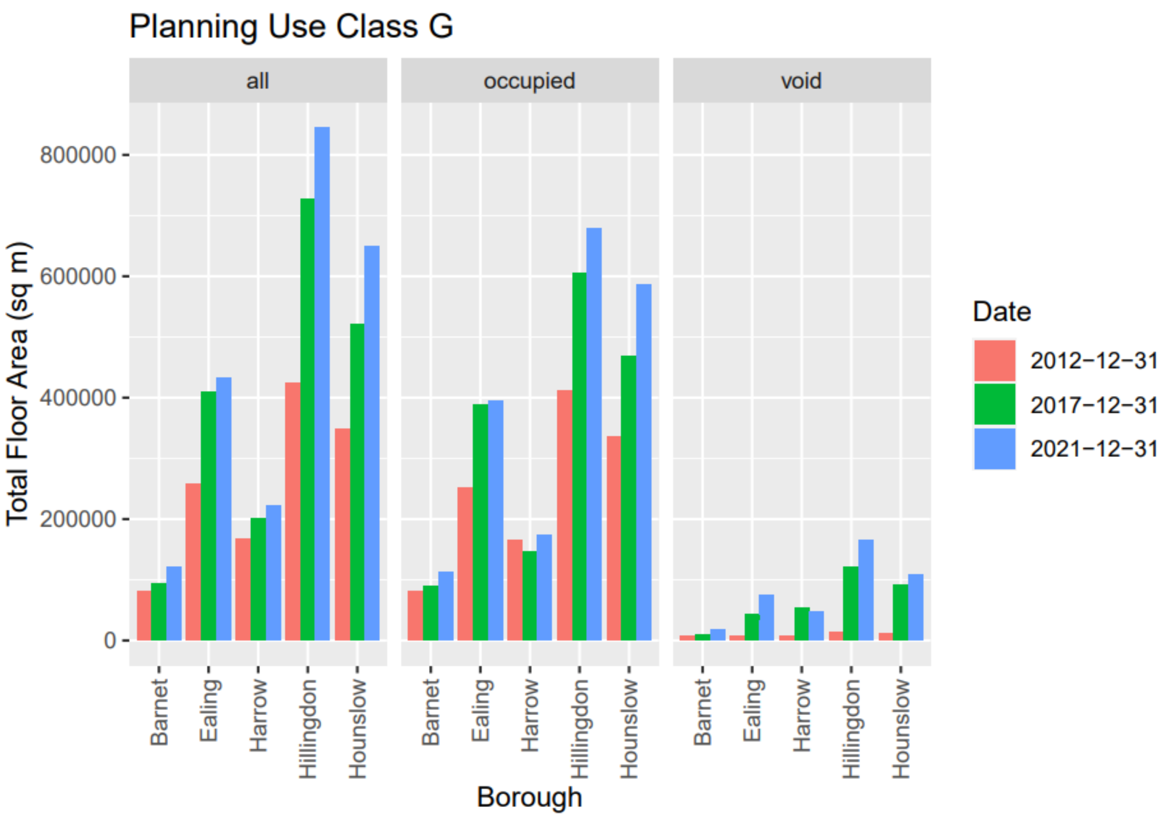


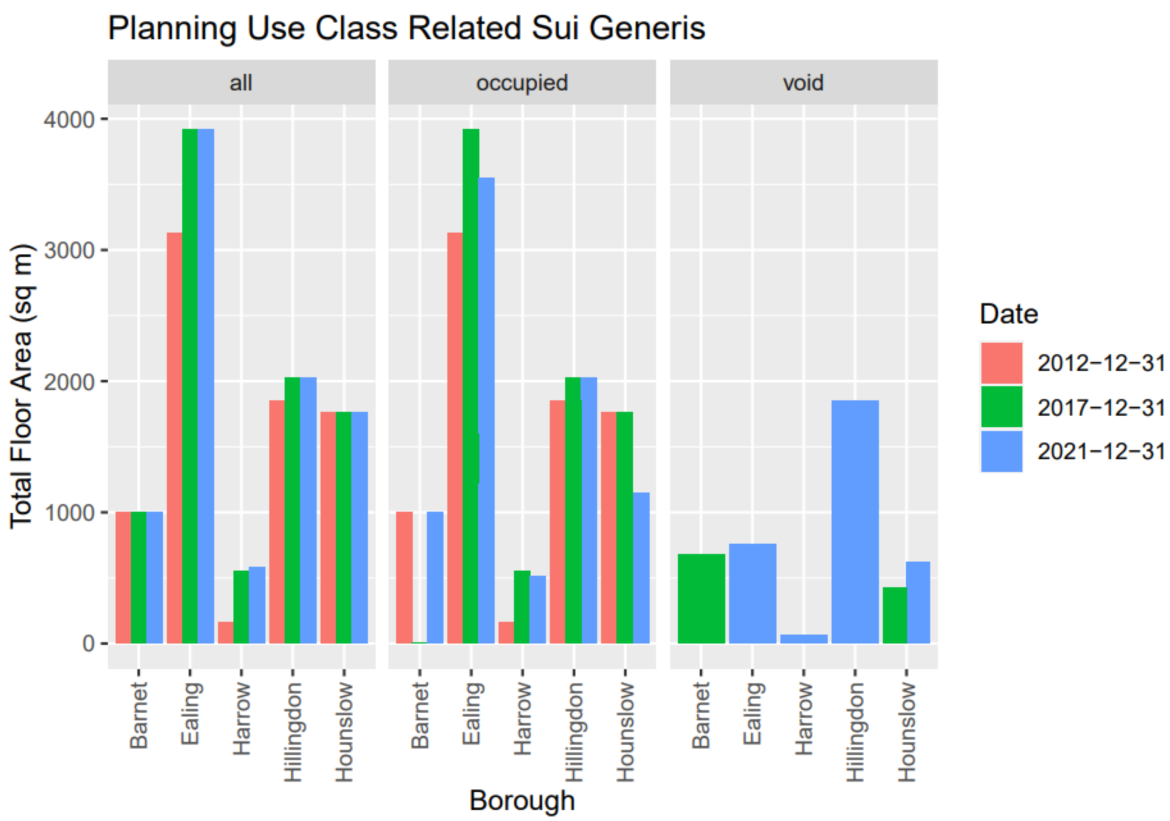



Planning Use Class C
all
occupied
void
Total Floor Area (sq m)
20000
15000
10000
5000
0
Barnet
Ealing
Harrow
Hillingdon
Hounslow
Borough
Date
2012−12−31
2017−12−31
2021−12−31


Planning Use Class D
all
occupied
void
Total Floor Area (sq m)
25000
20000
15000
10000
5000
0
Barnet
Ealing
Harrow
Hillingdon
Hounslow
Borough
Date
2012−12−31
2017−12−31
2021−12−31


Planning Use Class E
all
occupied
void
Total Floor Area (sq m)
6000
4000
2000
0
Barnet
Ealing
Harrow
Hillingdon
Hounslow
Borough
Date
2012−12−31
2017−12−31
2021−12−31


Planning Use Class G
all
occupied
void
Total Floor Area (sq m)
800000
600000
400000
200000
0
Barnet
Ealing
Harrow
Hillingdon
Hounslow
Borough
Date
2012−12−31
2017−12−31
2021−12−31

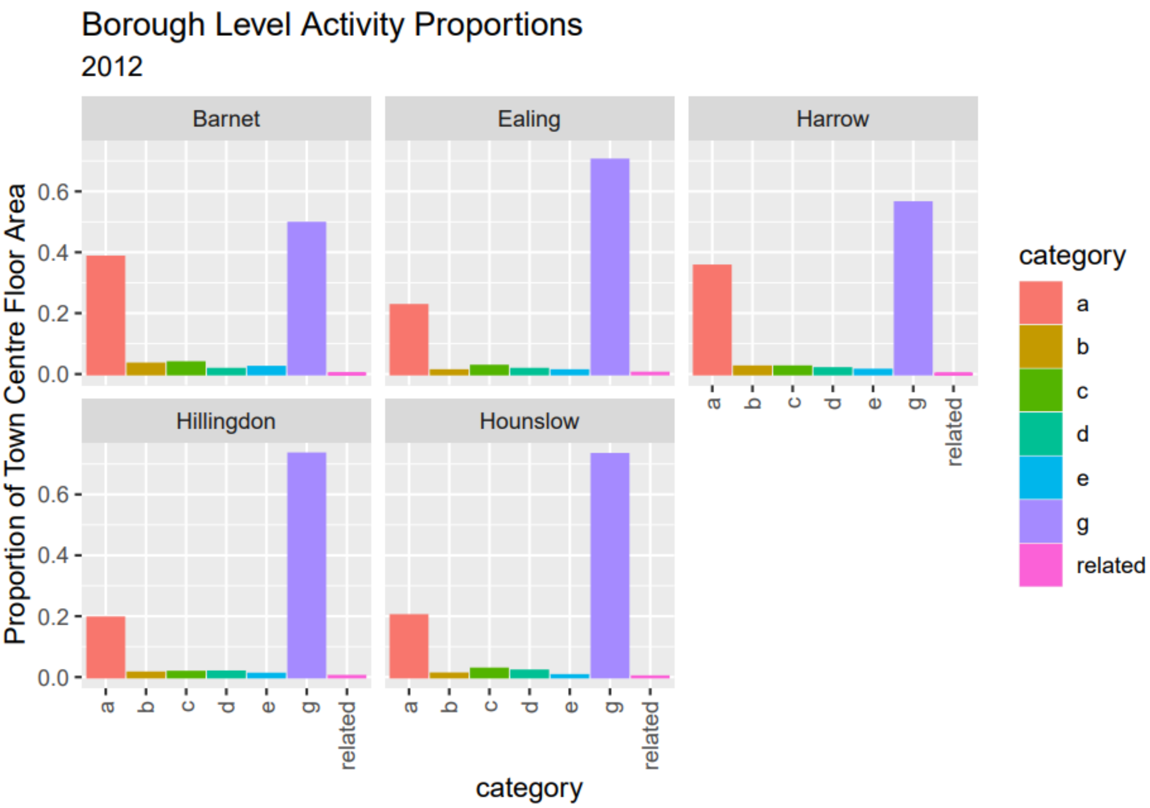


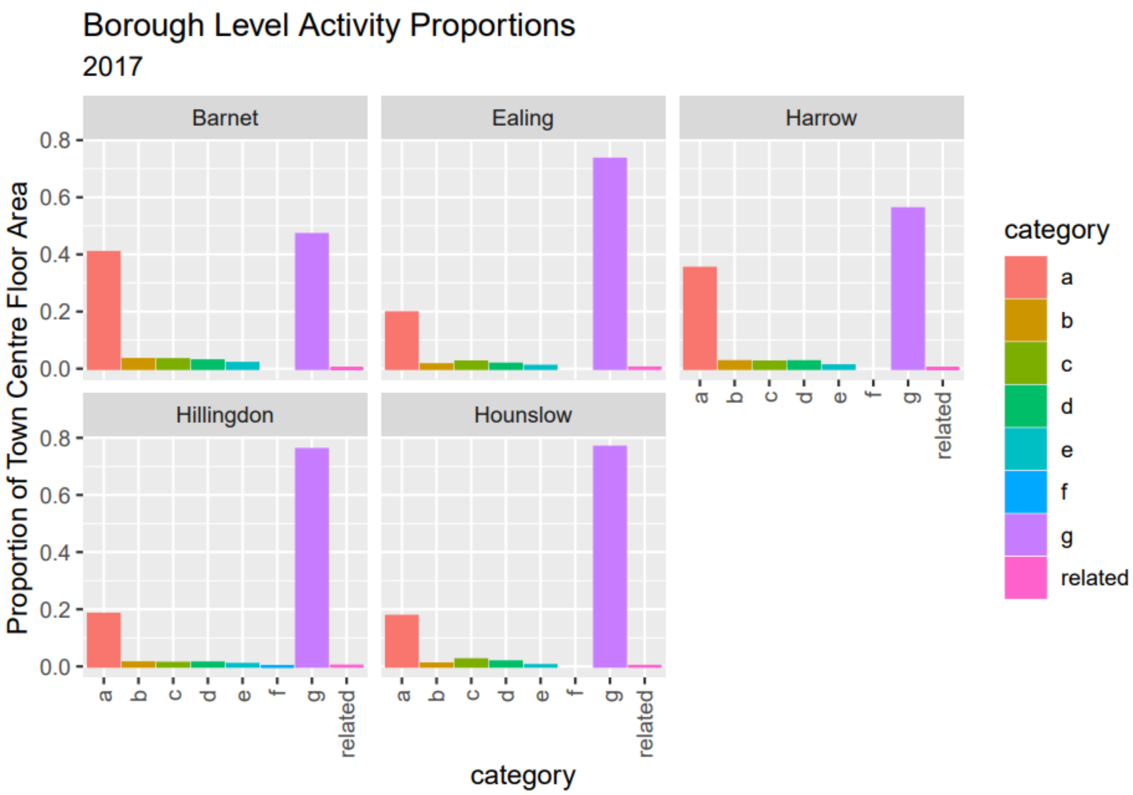
Benchmarking Against the Study Area

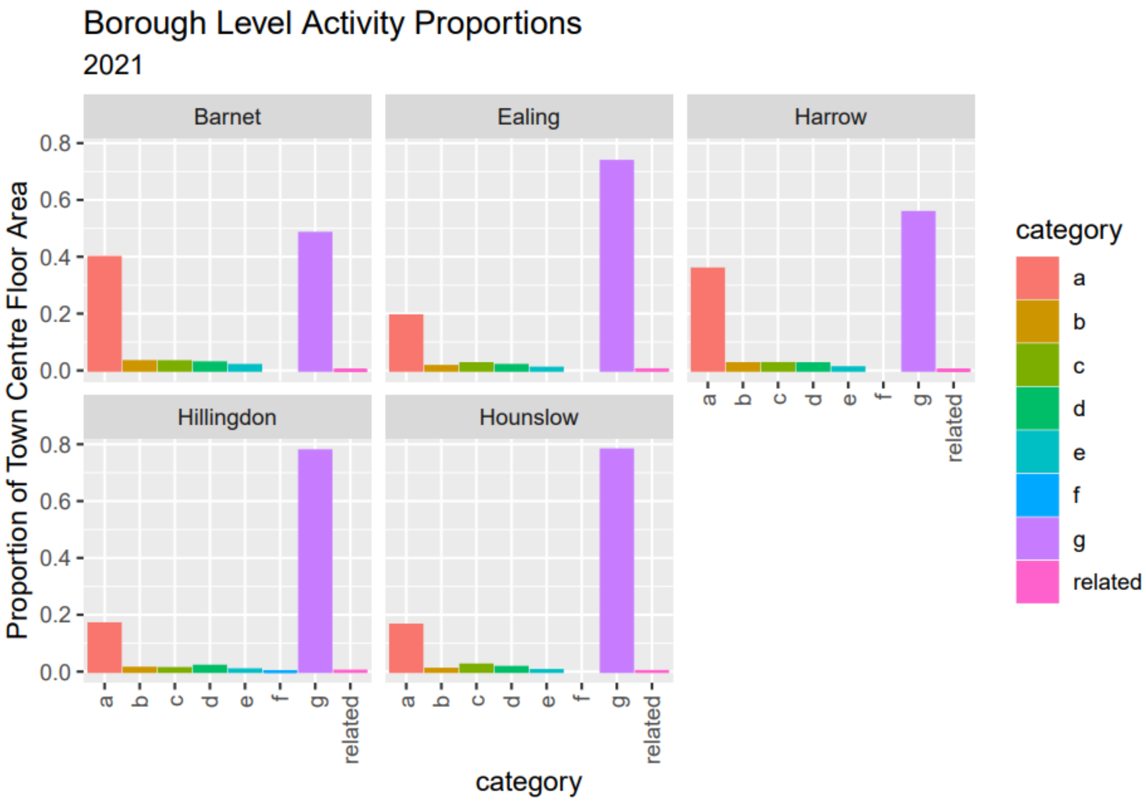
The preceding analysis has presented a picture of commercial (Class E) activity in the 40 town centres within the WLA study area between 2012 and 2021 using, principally, total floor area statistics with other information on counts of businesses and average floor sizes. The analysis covered both vacant and occupied buildings.

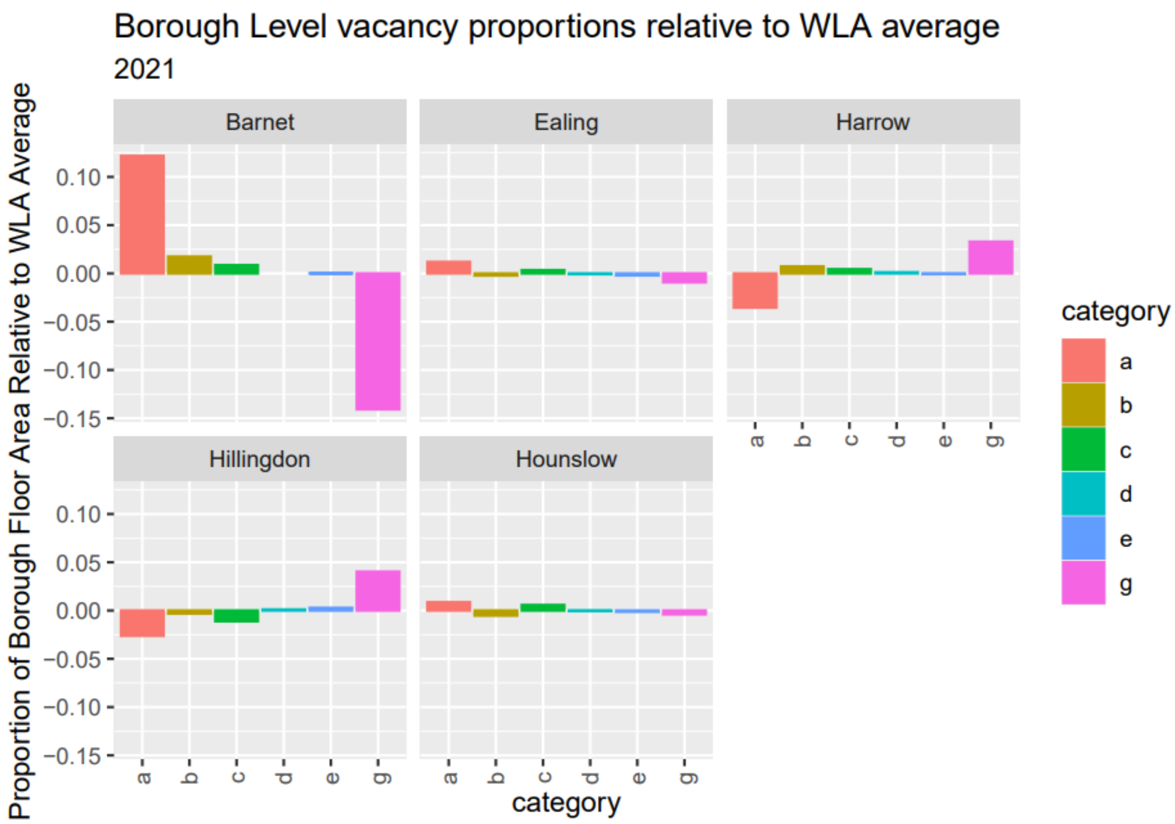
However, while raw figures tell part of the story, comparison against ‘expected’ profiles can shed further light. The following analysis defines our expected situation as the WLA area average.

To begin, we explore local Class E activity proportions for each Town Centre Area:


Borough Level Activity Proportions
2012
Barnet
Ealing
Harrow
Hillingdon
Hounslow
Proportion of Town Centre Floor Area
0.0
0.2
0.4
0.6
a
b
c
d
e
g
related
category
category
a
b
c
d
e
g
related


Borough Level Activity Proportions
2017
Barnet
Ealing
Harrow
Hillingdon
Hounslow
Proportion of Town Centre Floor Area
0.0
0.2
0.4
0.6
0.8
a
b
c
d
e
f
g
related
category
category
a
b
c
d
e
f
g
related


Borough Level Activity Proportions
2021
Barnet
Ealing
Harrow
Hillingdon
Hounslow
Proportion of Town Centre Floor Area
category
a
b
c
d
e
f
g
related


Borough Level vacancy proportions relative to WLA average
2021
Barnet
Ealing
Harrow
Hillingdon
Hounslow
Proportion of Borough Floor Area Relative to WLA Average
category
a
b
c
d
e
g

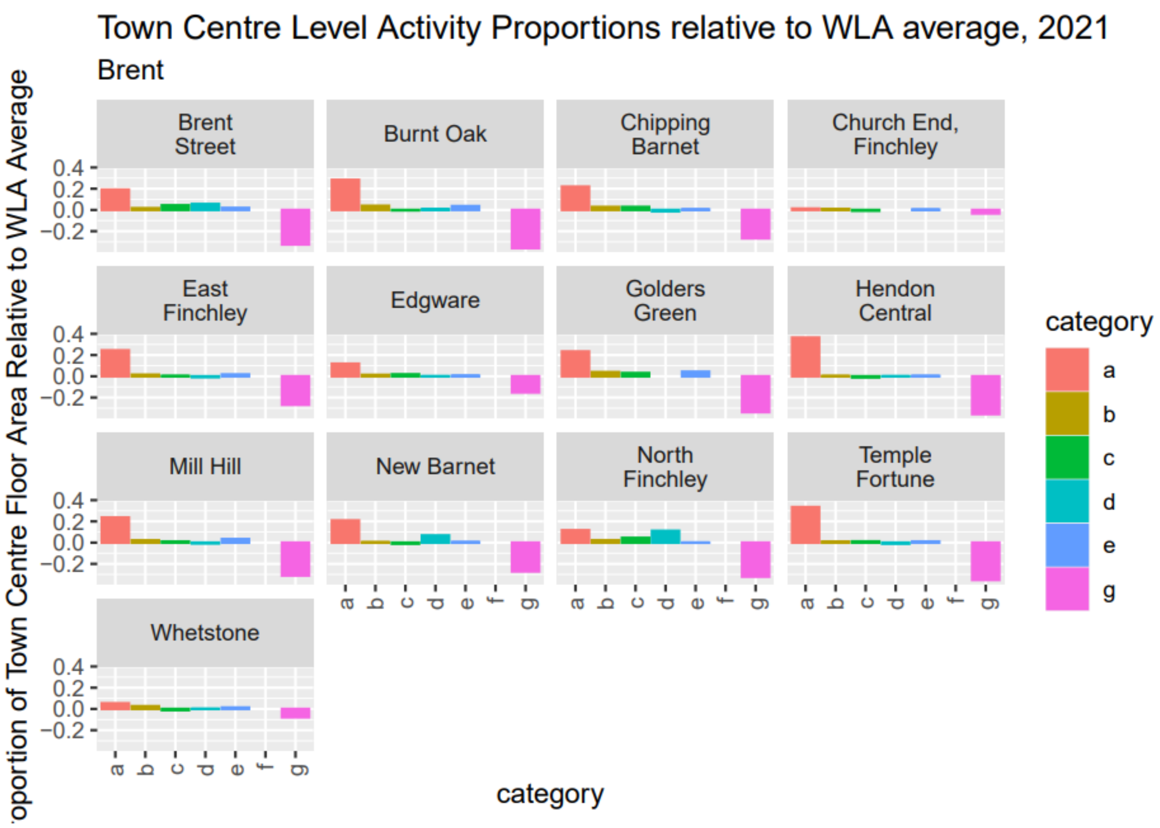
Observations

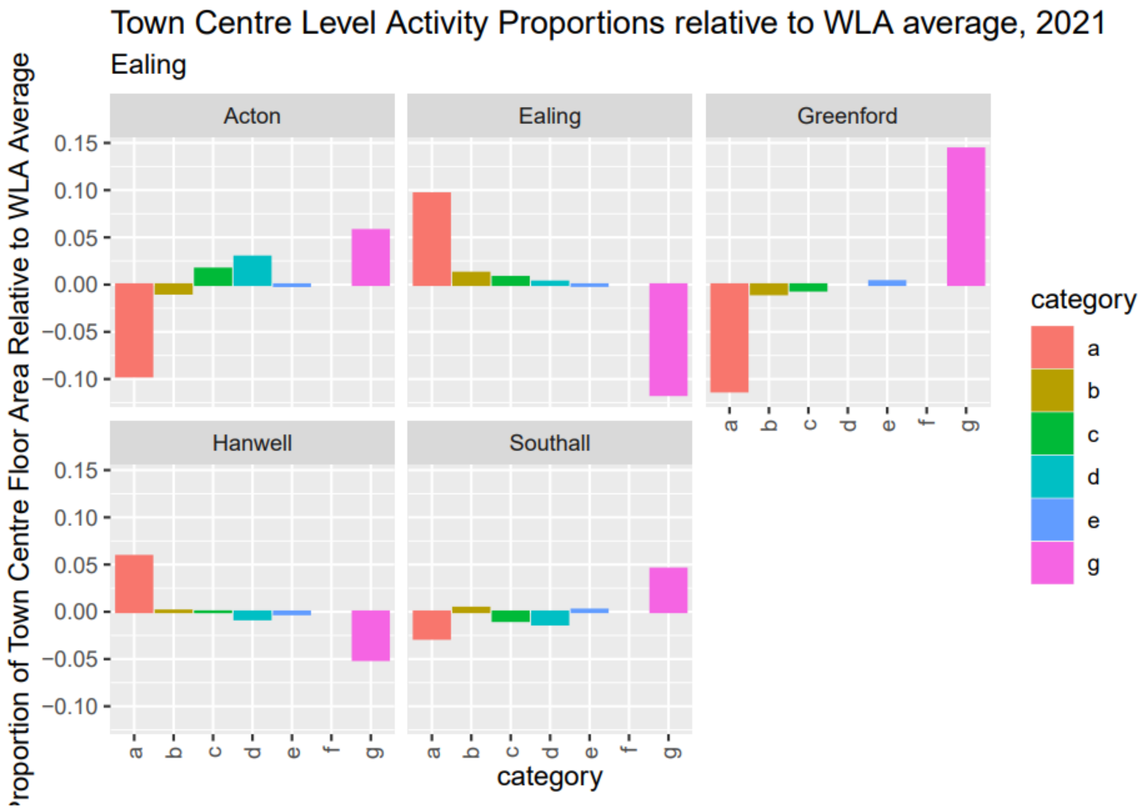
At the borough level, we see some small movement in activity level proportions - mainly relating to relative reductions in retail activities and increases in office activity between 2012 and 2021, but these are relatively minor.

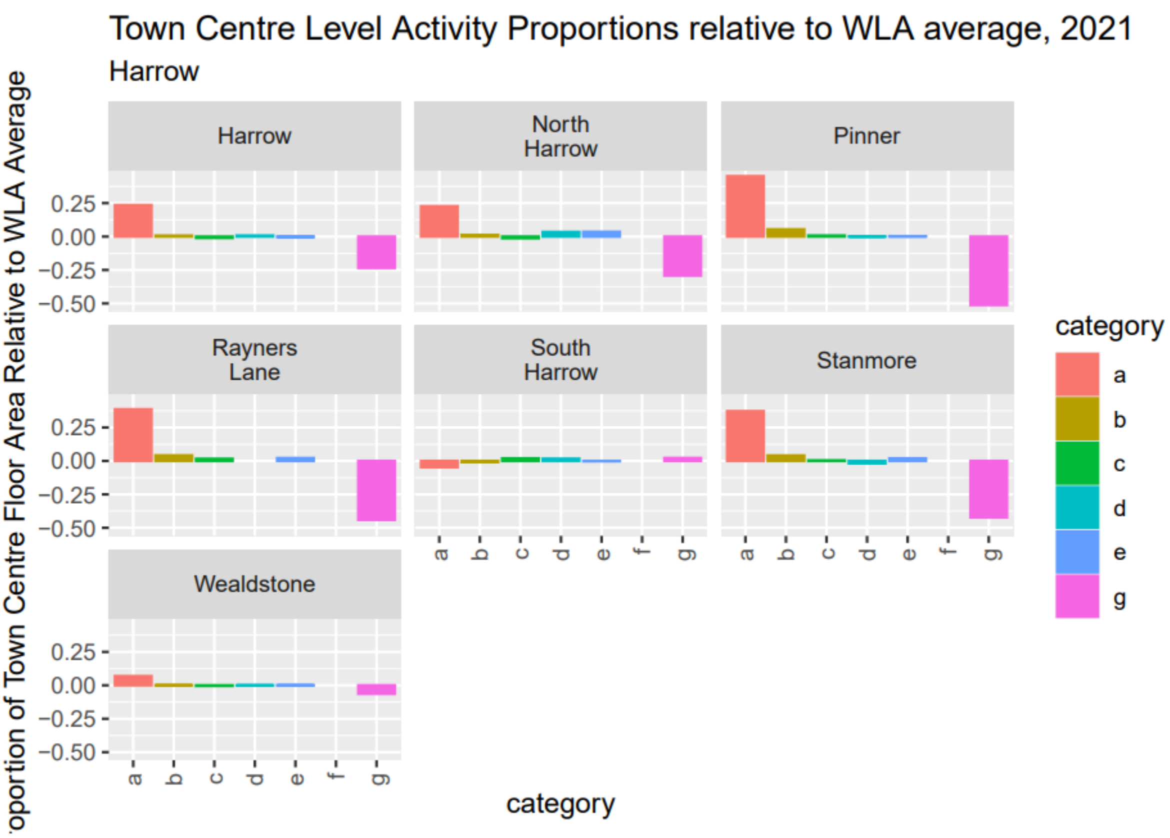
When comparing these patterns with the WLA average, it becomes clear that Barnet and Ealing represent something approaching the average with Hillingdon showing well above average office activities and Hounslow above average retail activities.

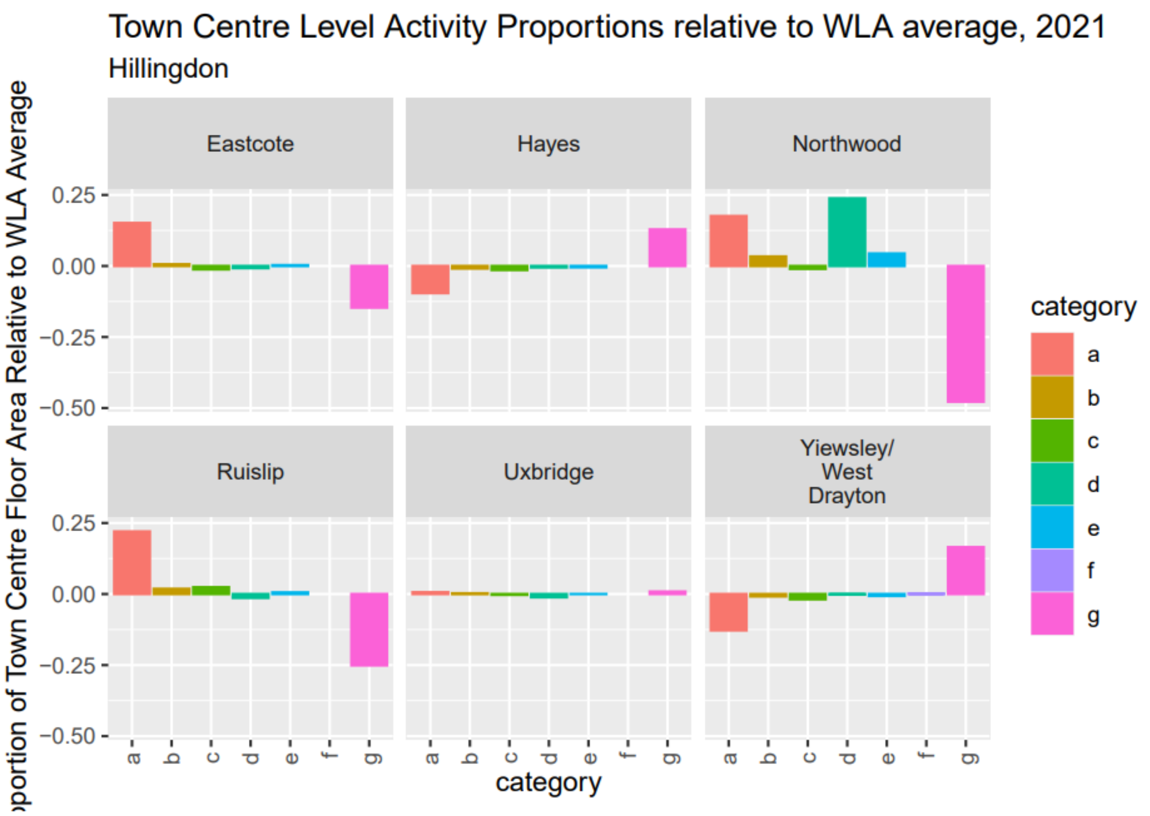
These variations are, of course, more pronounced for some Town Centre Areas. Below these profiles are provided for, first, occupied businesses, then vacant business properties:

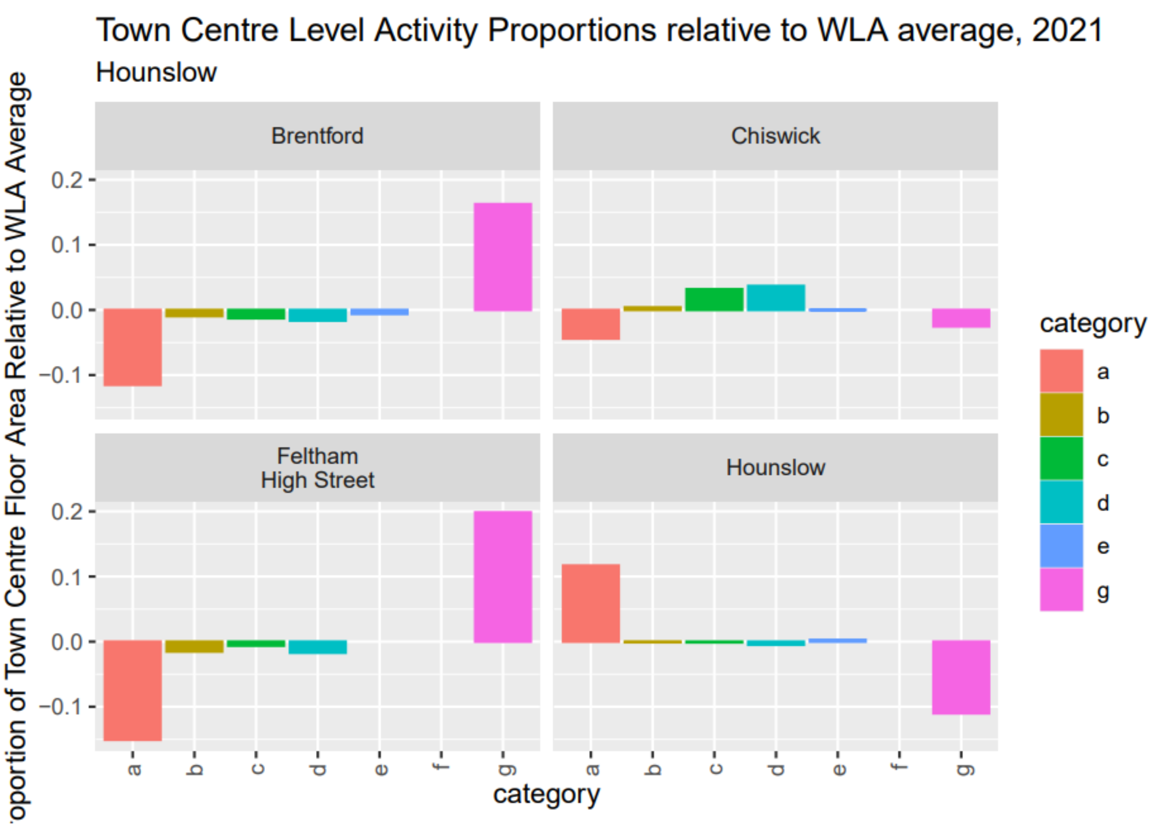
Occupied Businesses, 2021



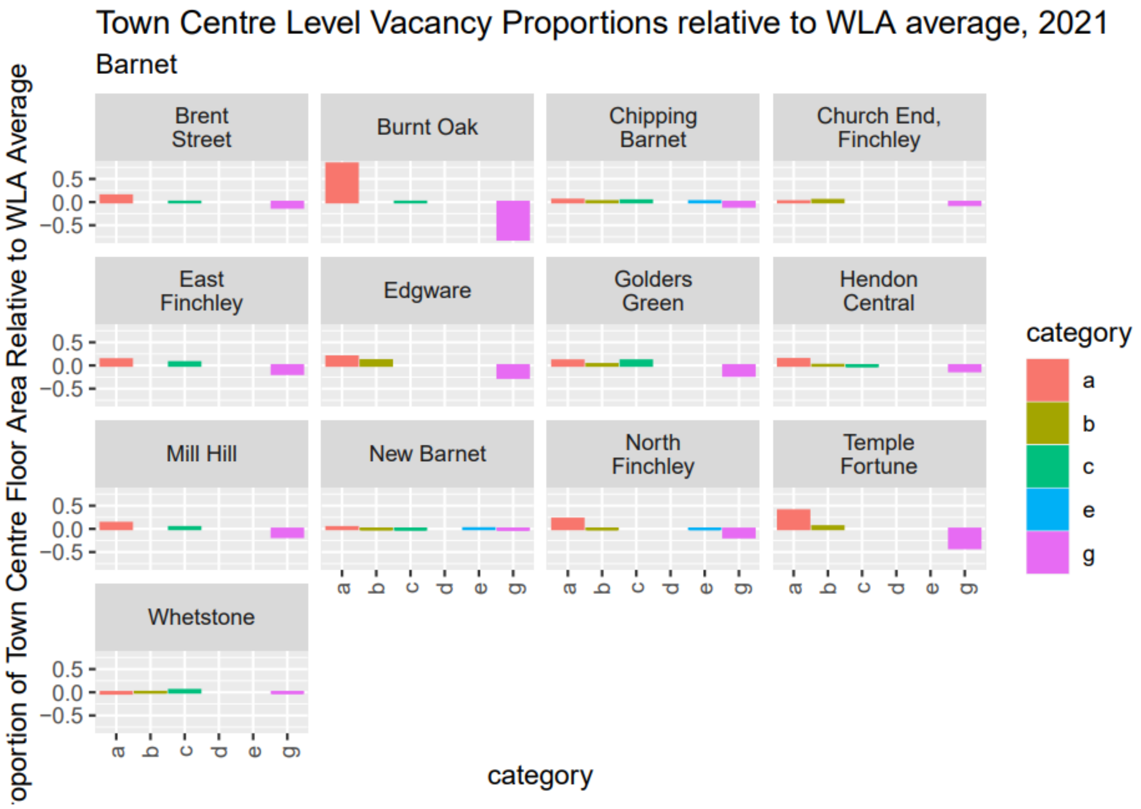

Town Centre Level Activity Proportions relative to WLA average, 2021
Ealing
Acton
Ealing
Greenford
Hanwell
Southall
Proportion of Town Centre Floor Area Relative to WLA Average
category
a
b
c
d
e
g

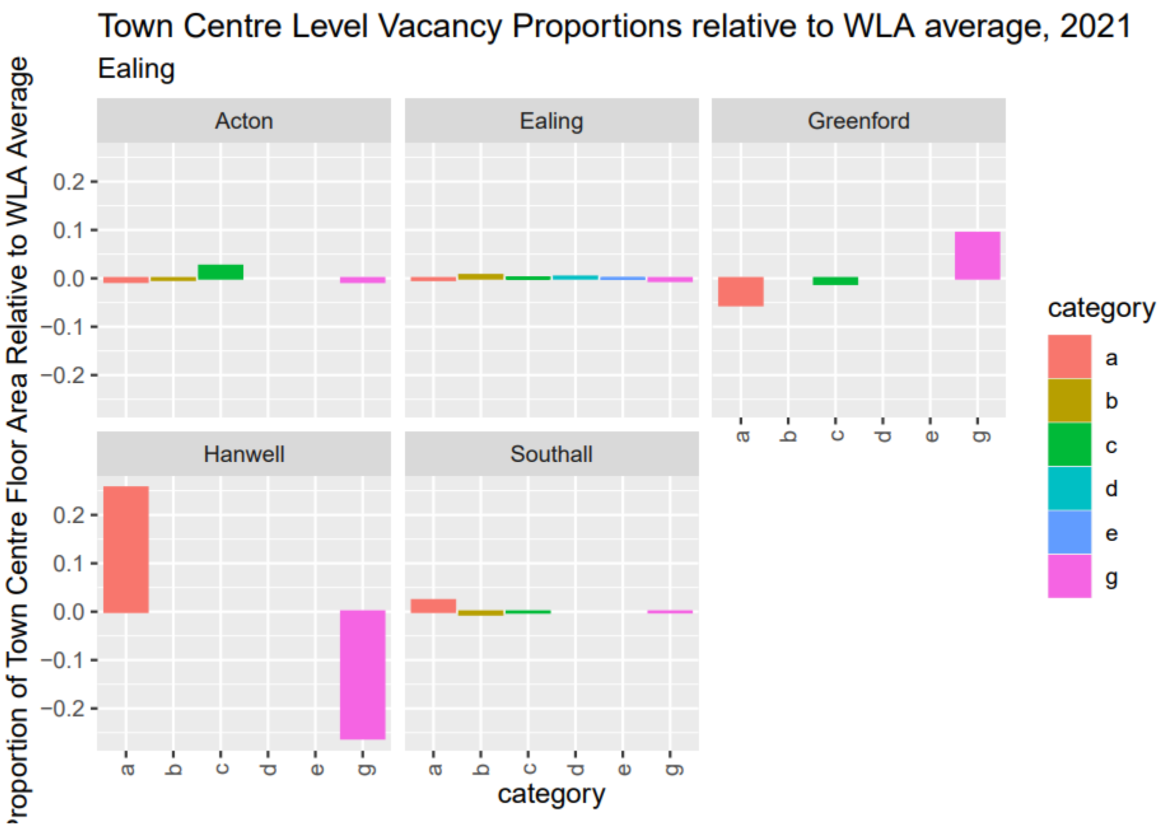

Town Centre Level Activity Proportions relative to WLA average, 2021
Harrow
Harrow
North Harrow
Pinner
Rayners Lane
South Harrow
Stanmore
Wealdstone
Proportion of Town Centre Floor Area Relative to WLA Average
category
a
b
c
d
e
g

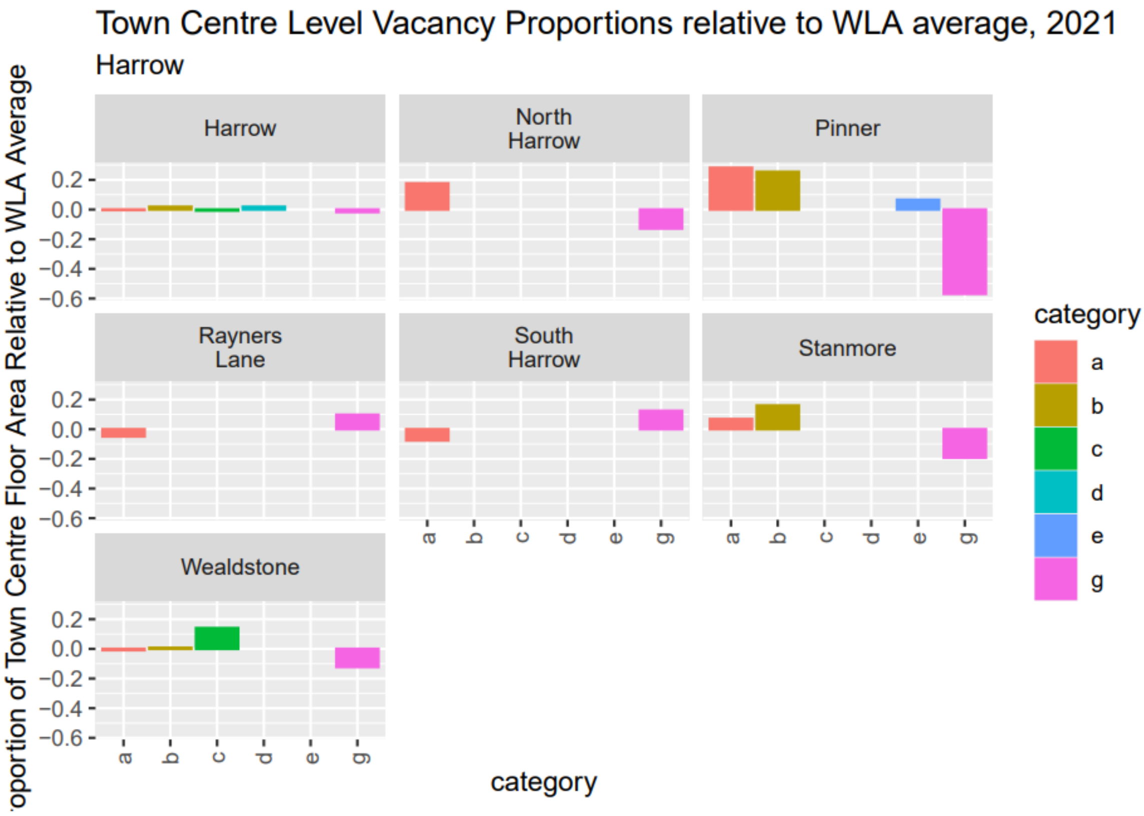

Town Centre Level Activity Proportions relative to WLA average, 2021
Hillingdon
Eastcote
Hayes
Northwood
Ruislip
Uxbridge
Yiewsley/ West Drayton
0.25
0.00
−0.25
−0.50
a b c d e f g
category
oportion of Town Centre Floor Area Relative to WLA Average
category
a
b
c
d
e
f
g

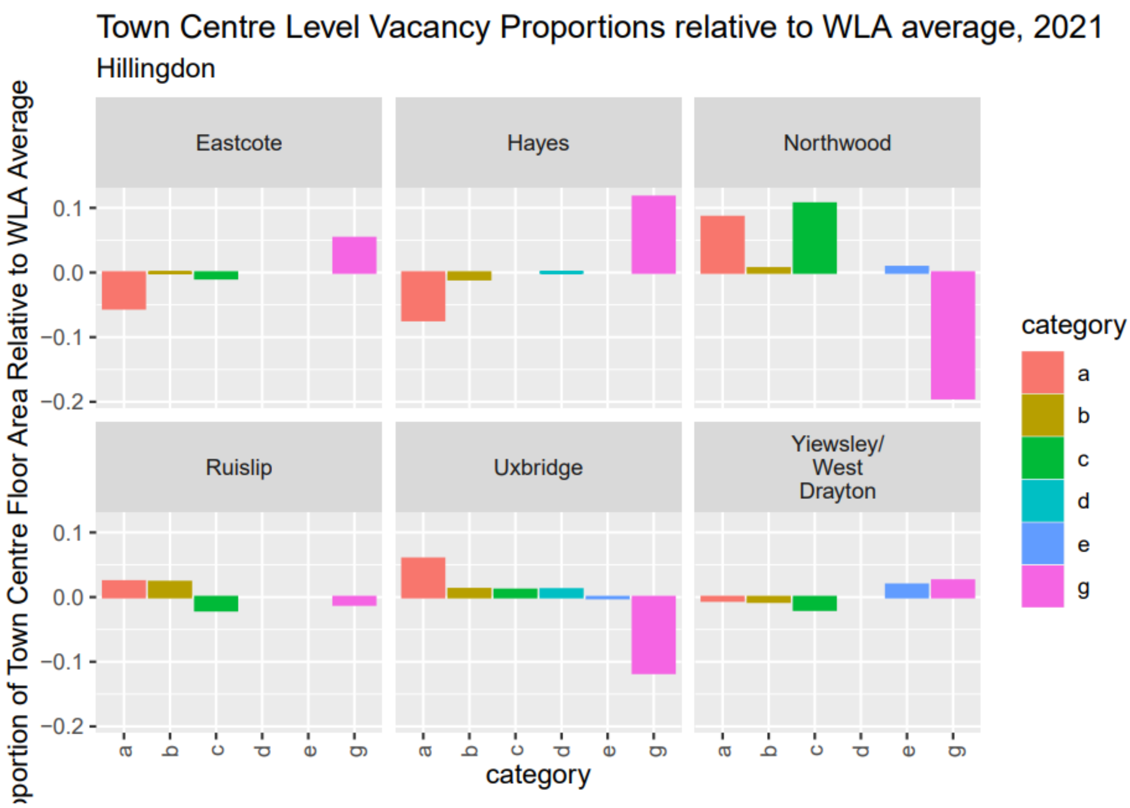

Town Centre Level Activity Proportions relative to WLA average, 2021
Hounslow
Brentford
Chiswick
Feltham High Street
Hounslow
0.2
0.1
0.0
−0.1
a b c d e f g
category
oportion of Town Centre Floor Area Relative to WLA Average
category
a
b
c
d
e
g

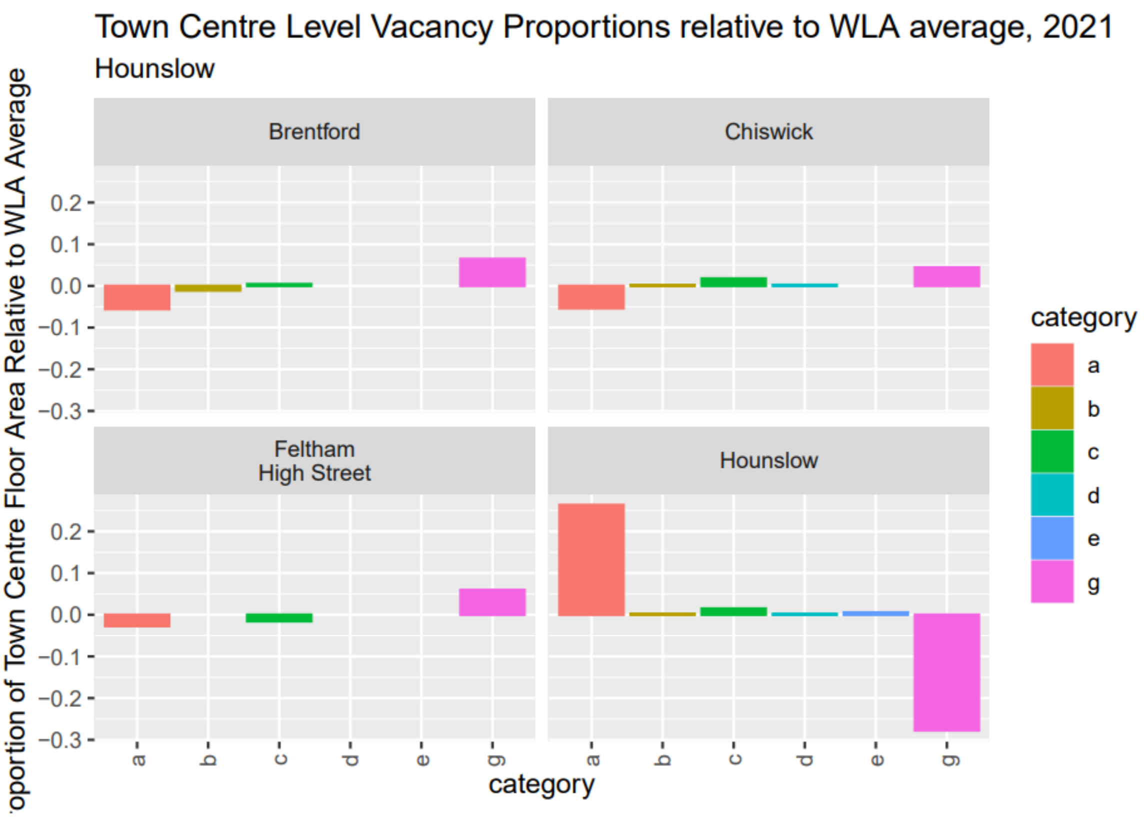
Vacant Businesses, 2021






Town Centre Level Vacancy Proportions relative to WLA average, 2021
Harrow
Proportion of Town Centre Floor Area Relative to WLA Average
Harrow
North Harrow
Pinner
Rayners Lane
South Harrow
Stanmore
Wealdstone
0.2
0.0
−0.2
−0.4
−0.6
a
b
c
d
e
g
category
category
a
b
c
d
e
g


Town Centre Level Vacancy Proportions relative to WLA average, 2021
Hillingdon
Proportion of Town Centre Floor Area Relative to WLA Average
Eastcote
Hayes
Northwood
Ruislip
Uxbridge
Yiewsley/ West Drayton
0.1
0.0
−0.1
−0.2
a
b
c
d
e
g
category
category
a
b
c
d
e
g

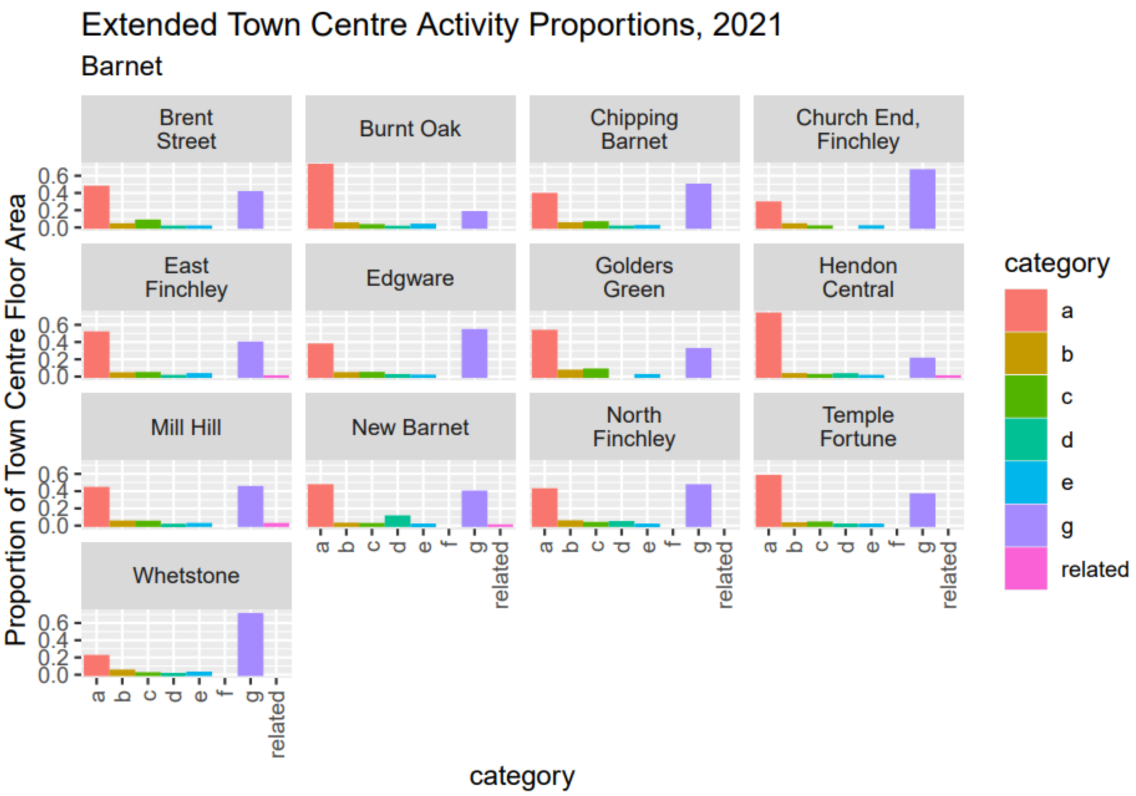


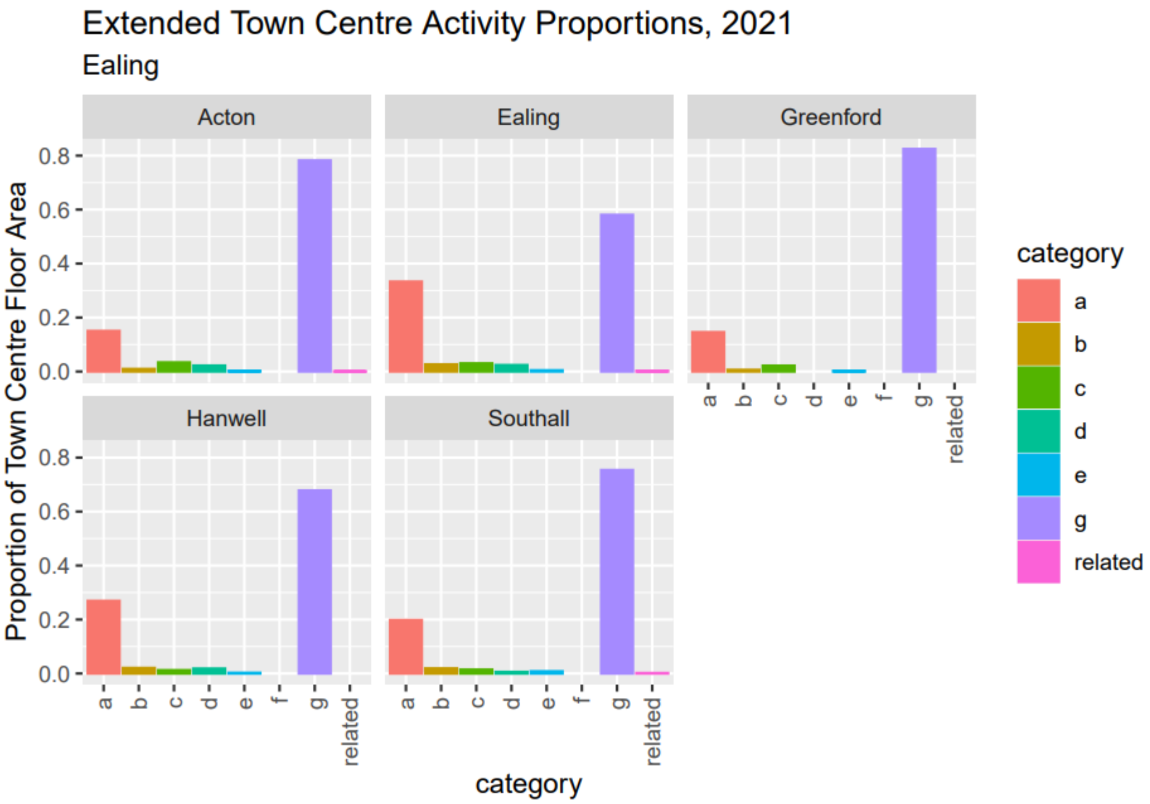
Town Centre Level Vacancy Proportions relative to WLA average, 2021
Hounslow
Brentford
Chiswick
Feltham
High Street
Hounslow
0.2
0.1
0.0
−0.1
−0.2
−0.3
a
b
c
d
e
g
category
roportion of Town Centre Floor Area Relative to WLA Average

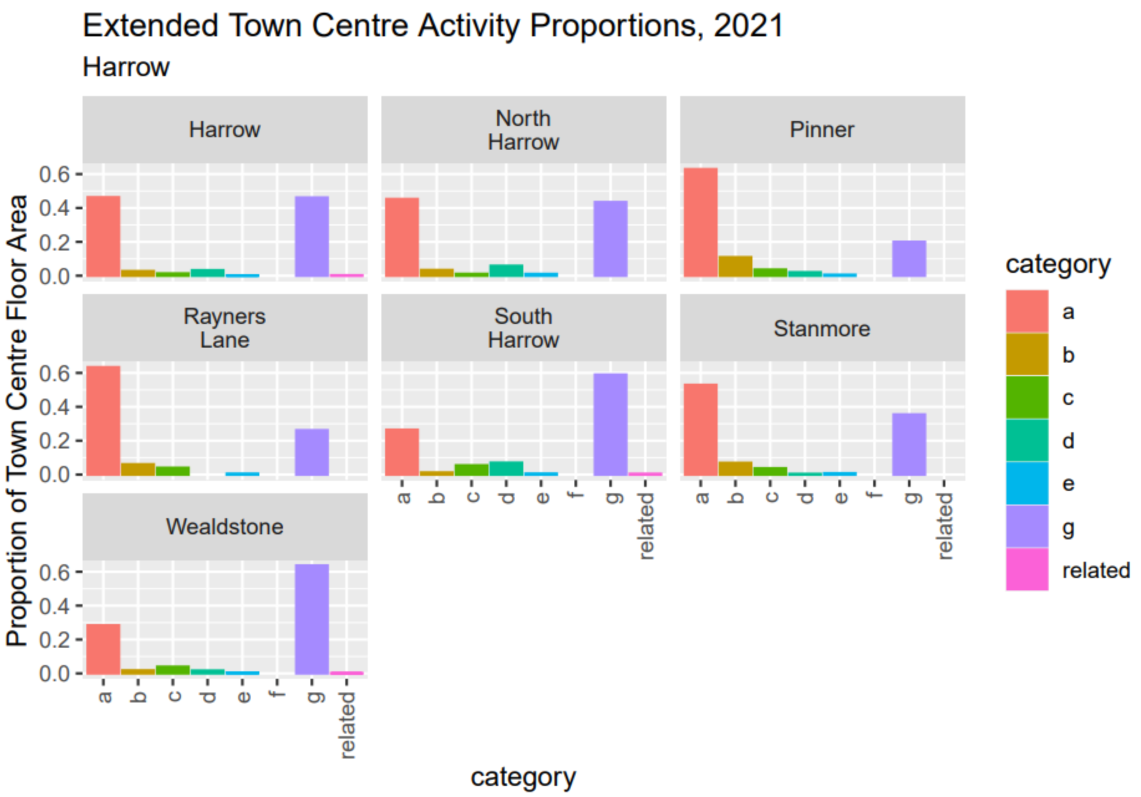
Activity Outside of Designated Town Centre Areas

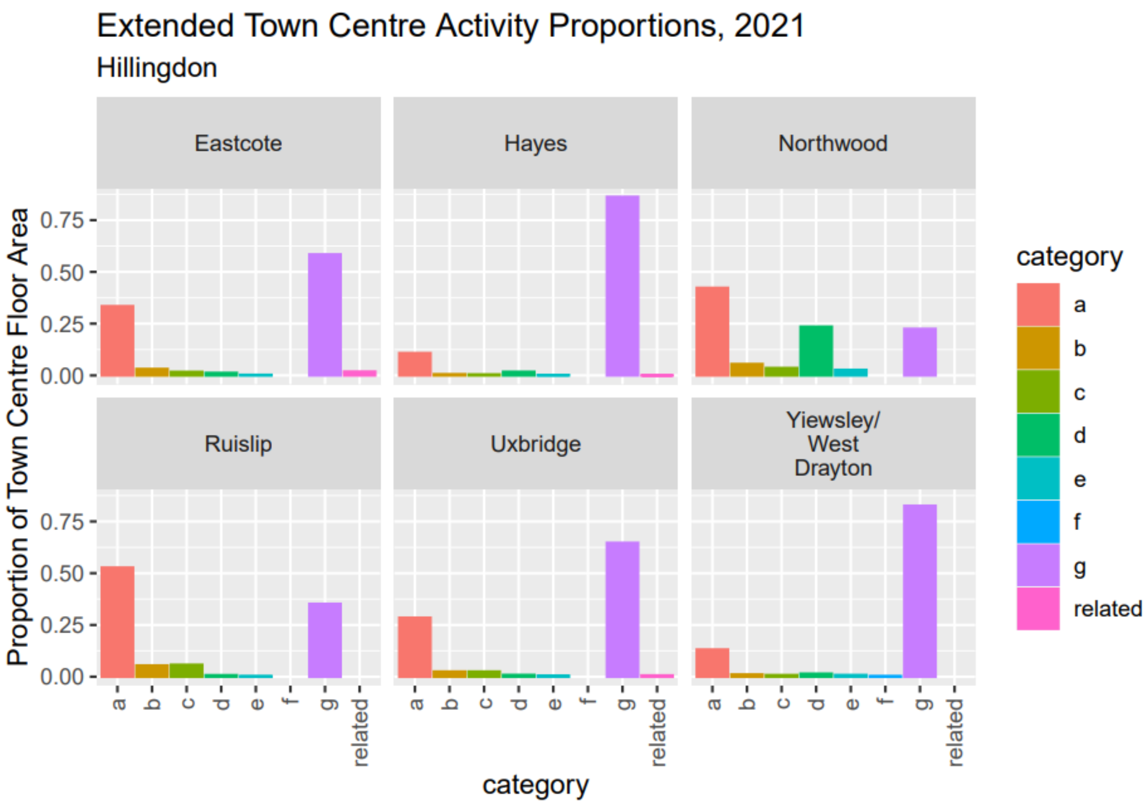
As is shown in Figure 1, the research team have identified a number of Class E business activity clusters outside of the boundaries of the official Town Centre Areas.

Allocating these business clusters to their nearest town centre and then including these businesses in the analysis presents quite a different picture of business activity in the WLA study area.




Extended Town Centre Activity Proportions, 2021
Ealing
Acton
Ealing
Greenford
Hanwell
Southall
Proportion of Town Centre Floor Area
category
category
a
b
c
d
e
g
related


Extended Town Centre Activity Proportions, 2021
Harrow
Harrow
North Harrow
Pinner
Rayners Lane
South Harrow
Stanmore
Wealdstone
Proportion of Town Centre Floor Area
category
category
a
b
c
d
e
g
related


Extended Town Centre Activity Proportions, 2021
Hillingdon
Eastcote
Hayes
Northwood
Ruislip
Uxbridge
Yiewsley/ West Drayton
Proportion of Town Centre Floor Area
0.75
0.50
0.25
0.00
a b c d e f g related
category
category
a
b
c
d
e
f
g
related

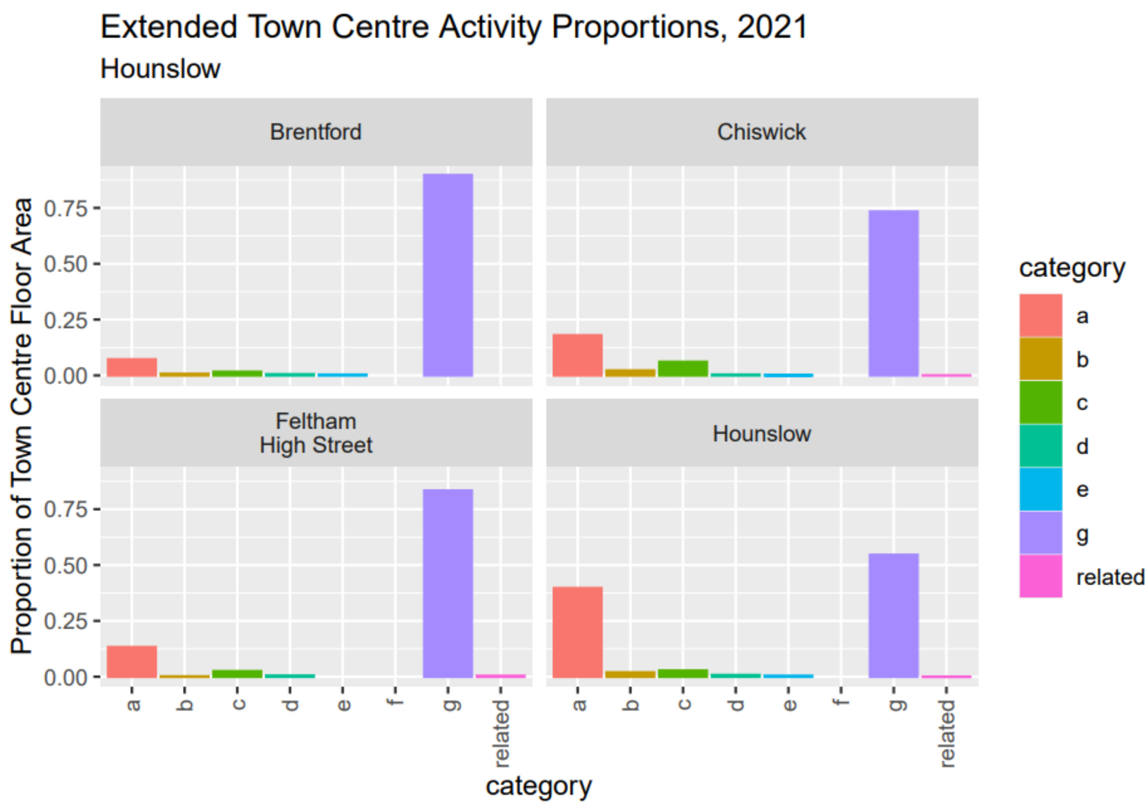

Extended Town Centre Activity Proportions, 2021
Hounslow
Brentford
Chiswick
Feltham High Street
Hounslow
Proportion of Town Centre Floor Area
0.75
0.50
0.25
0.00
a b c d e f g related
category
category
a
b
c
d
e
g
related

Table 7: Occupancy statistics by Class E sub-class, extended Town Centre Areas

A	2012	1,092,107	8,740	118.2
A	2017	1,459,757	11,470	122.1
A	2021	1,558,739	12,188	123.5
B	2012	76,777	524	134.9
B	2017	113,111	739	141.8
B	2021	116,536	802	136.2
C	2012	109,157	630	172.5
C	2017	137,217	958	156.3
C	2021	149,544	1,238	137.0
D	2012	35,608	37	1040.7
D	2017	69,178	77	848.9
D	2021	102,044	98	1073.3
E	2012	20,111	175	113.6
E	2017	26,513	229	115.5
E	2021	26,308	244	101.0
F	2012	0	0	0.0
F	2017	500	1	500.1
F	2021	500	1	500.1
G	2012	1,980,281	7,237	237.9
G	2017	3,498,591	12,998	224.6
G	2021	3,786,133	15,773	196.1
Related	2012	8,951	24	353.4
Related	2017	6,717	32	237.1
Related	2021	5,050	38	150.2
NA	2012	3,322,993	17,368	170.7
NA	2017	5,311,584	26,506	175.7
NA	2021	5,744,854	30,386	162.6

Table 8: Vacancy statistics by Class E sub-class, extended Town Centre Areas

A	2012	18,878	8130	2.0
A	2017	91,034	11,470	6.6
A	2021	116,169	12,188	8.2
B	2012	1,760	85	20.6
B	2017	7,187	562	13.7
B	2021	14,182	679	21.3
C	2012	3,550	296	19.9
C	2017	17,791	814	25.2
C	2021	23,372	1,097	29.5
D	2012	894	6	303.1
D	2017	1,158	10	228.1
D	2021	3,461	39	161.4
E	2012	191	23	12.0
E	2017	737	41	19.2
E	2021	3,001	81	76.1
F	2012	0	0	0.0
F	2017	0	0	0.0
F	2021	0	0	0.0
G	2012	56,879	6,945	8.0
G	2017	502,545	12,987	30.9
G	2021	785,807	15,682	41.1
Related	2012	0	0	0.0
Related	2017	1,105	3	446.5
Related	2021	3,735	23	304.9
NA	2012	82,359	17,368	3.9
NA	2017	621,557	26,506	18.6
NA	2021	949,849	30,386	24.3

Key Observations

- Our analysis has shown that ignoring Class E activity outside of Town Centre Areas significantly under-estimates economic activity across the WLA boroughs.
- Office floor space and unit counts dominates outside of Town Centre Areas, both in terms of occupancy and vacancy statistics.
- The average floor area for retail businesses drops by around 20 m^2 outside of Town Centre Areas, while it increases by some 80 m^2 for office space.
- The average floor area for office space has been noticeably decreasing since 2012 outside of Town Centre Areas as well
- Vacancy statistics are driven by office vacancy and it is this Class E sub-class which has shown the greatest increase in terms of counts and vacant floor space across the whole WLA area.

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