

Appendix [7] Retail impact tables

Table 1: Convenience goods turnover of the proposed development

Occupier	Gross floorspace (sq.m.)	Net (sales) Floorspace (sq.m.)	Company average sales density £'s sq.m.	Turnover 2021 (£ms)	Turnover 2024 (£ms)
Farmfoods	687	575	5,424	3.12	3.12

Table 2: Population and convenience goods expenditure within the PCA 2021-2024

	2021	2024
Population	41,808	42,240
Expenditure per capita (£'s)	£2,081	£2,042
Total convenience goods expenditure (£ms)	£87.00	£86.25
Total convenience goods expenditure excluding special forms of trading (£ms)	£81.52	£81.07

Note:

1. Population within the 5-minute drive time is sourced from Experian using the company's Location Analyst software under licence.
2. Expenditure per capita within the 5-minute drive time sourced from Experian. This excludes special forms of trading equating to 6.3% in 2021 and 6.0% in 2024 (Source: Figure 5, Experian Retail Planner Briefing Note 19, January 2022).
3. Per capita growth rates for convenience goods based on Figure 6 of Experian Retail Planner Briefing Note 19.

Table 3: High level assessment of retail impact 2024 (£ms)

PCA convenience goods expenditure in 2024 from residents	£81.07
Inflow (assumed 10%)	£8.11
Total resident expenditure + inflow	£89.18
Convenience goods turnover of Uxbridge Road, Hayes Town Centre	£74.1
Convenience goods turnover of Uxbridge Road, Hayes Town Centre drawn from PCA	£18.5
Market Penetration Rate (MPR) of PCA of Uxbridge Road, Hayes	22.8%
Proposed convenience goods trade draw within Farmfoods in 2024 drawn from the PCA (%)	90%
Proposed convenience goods turnover draw within Farmfoods in 2024 drawn from the PCA	£2.81
Market Penetration Rate (MPR)	3.5%
Impact on MPR of existing stores in 2024	$22.8\% \times 3.5\% = 0.80\%$
Trade diversion based on reduction in MPR for existing convenience goods stores in 2024	$0.80\% \times £81.07m = £0.65m$ $£0.65m / £74.1m =$ 0.88%

Notes:

1. The Convenience Goods Retail Study Update (2012) concludes that Uxbridge Road draw the majority of its trade from the southern part of Hillingdon with little trade draw from residents in Southall to the east.
2. The estimated convenience goods turnover of Uxbridge Road Town Centre is based on the 2012 study adjusted to 2020 prices. The majority of the turnover is accounted for by the Sainsbury's superstore on the Lombardy retail park.

Table 4: Convenience goods impact on individual stores/centres in 2024

Centre/store	Convenience goods turnover 2024 (£ms)	Trade draw (%)	Trade draw (£ms)	Impact (%)
Uxbridge Road, Hayes				
- Sainsburys	£57.2	30%	0.94	1.6
- Lidl	£7.1	5%	0.15	2.1
- Other	£9.8	2%	0.06	0.6
Total	£74.1	37%	1.15	1.6
Uxbridge	£138.7	20%	0.62	0.4
Hayes District Centre	£14.4	1%	0.03	0.2
Yiewsley/West Drayton District Centre	£39.1	3%	0.09	0.2
Other town centres in Hillingdon	£289.1	13%	0.41	0.1
Out of centre	-	16%	0.50	N.C
Elsewhere	-	10%	0.32	N.C
Total	-	100%	3.12	N.C

Notes:

Other town centres in Hillingdon include: Eastcote District centre, Northwood District Centre, Ruislip District Centre, Minor Town Centres (Northwood Hills and Ruislip Manor), Local Centres and parades.