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# 1. INTRODUCTION

- 1.1 This supplementary paper has been prepared to inform the preparation of the Ealing Development Framework. It has been prepared by GVA Grimley's Planning Development and Regeneration (PDR) team and is based on the May 2007 overview of Ealing Town Centre's property market.
- 1.2 This supplementary paper provides additional analysis and forecasts of the potential need for new retail, commercial leisure, office and residential uses and floorspace up to 2021, drawing on the latest population and economic growth trends.
- 1.3 For the retail and commercial leisure sectors we also provide further information to support the Vision for an uplift in the scale and quality of Ealing town centre's offer. We consider that the treatment of this 'quality gap' is a vital element of the overall Vision, particularly in the context of committed and proposed new shopping centre developments and extensions in the West London area, such as White City and Brent Cross. This new and existing competition will further impact on established shopping and spend patterns across the West London area and Ealing town centre in particular.

## 2. RETAIL & COMMERCIAL LEISURE FUTURES

- 2.1 This section sets out our overview of the relative qualitative and quantitative need for new retail and commercial leisure floorspace in Ealing Town Centre.

### Ealing Town Centre: Retail Futures

- 2.2 Ealing Town Centre is the principal focus for shopping in the Borough of Ealing. The town centre is unusual in that it is divided into two distinct and very different areas. The main shopping centres of Ealing Broadway and West Ealing are separated by a range of other key town centre uses (predominantly offices) along the Uxbridge Road. As a result, the eastern (Ealing Broadway) and western (West Ealing) ends of the Uxbridge Road are characterised by their own distinct commercial offer, catchments and built form.
- 2.3 Ealing Broadway is the dominant shopping area and comprises a range of more mainstream national multiple retailers. In contrast West Ealing is characterised by more value-orientated multiple retailers and a mix of independent/ethnic retailers, primarily serving its local resident catchment population.
- 2.4 Given the different scale, character, attraction and role of these two distinct shopping centres, we have necessarily considered them separately in our review of their respective retail and commercial leisure offer.
- 2.5 The following sets out the headlines from the findings of our May 2007 study. It specifically identifies the key issues facing the future vitality and viability of these two centres as shopping and leisure destinations.
- 2.6 Ealing is classified as a **Metropolitan Centre** in the London Plan. These centres are identified as typically serving wide catchment areas covering several Boroughs. They generally comprise a significant quantum and range of comparison shopping, typically over 100,000 sqm of retail floorspace.
- 2.7 However, based on the surveys and research carried out as part of the West London Study, it is clear that Ealing's catchment is not as wide as other London Metropolitan Centres (such as, for example, Bromley, Croydon, Romford and Kingston). This partly reflects the level of competition from other shopping locations in West London, but it also, in our view, reflects the fact that the scale and quality of Ealing's retail and wider town centre offer is falling behind other Metropolitan Centres, many of which have experienced significant new retail development and investment over the last decade.

- 2.8 Ealing Town Centre as a whole has a total estimated **floorspace** of circa 124,292 sq.m gross according to The London Plan document '*London-wide Town Centre Health Checks 2006 Analysis*', published in 2007. This comprises a total retail floorspace of circa 92,422 sq.m, of which 69,432 sq.m is estimated to be for comparison goods retailing. Therefore, in terms of its overall comparison goods offer, it falls significantly behind the majority of London's other Metropolitan Centres in terms of its total floorspace (such as, for example, Bromley, Croydon, Romford, Ilford, Sutton and Hounslow).
- 2.9 The '*London Town Centre Assessment*' conducted for the Greater London Authority (GLA) in September 2004 also shows that Ealing's comparison goods floorspace is lower than for a number of 'Major Centres', including Camden Town, Walthamstow, Kensington High Street, Lewisham, Streatham and Wimbledon. We therefore conclude that Ealing is not "punching its weight" as a Metropolitan Centre in the context of London's identified network of centres.
- 2.10 This is further underlined by the fact that although Ealing Broadway has slightly improved its **Javelin VenueScore** ranking from 106<sup>th</sup> to 100<sup>th</sup> between 2005/06, it is still behind other Metropolitan Centres in the national rankings of shopping locations<sup>1</sup>. For example, Kingston (16<sup>th</sup>), Croydon (27<sup>th</sup>), Bromley (30<sup>th</sup>) Romford (54<sup>th</sup>) and Sutton (80<sup>th</sup>) are all ranked significantly higher than Ealing based on the scale and quality of their retail offer. We would expect that, as part of the Vision for Ealing, it is realistic to assume that the town centre could and should achieve a ranking in the 'top 50-75' centres.
- 2.11 Our assessment of other key economic performance indicators also indicated that Ealing is 'lagging' behind other centres. For example, Ealing Broadway's 2006 estimated **Prime Zone A Rental Level** of c.£2,045/sqm was significantly lower than for Oxford Street West (£5,651/sq.m), Brent Cross (£4,575/sq.m) and Kingston (£3,283/sq.m), as well as for Uxbridge (£2,260/sq.m) and Richmond (£2,153/sq.m).
- 2.12 Also, although **vacancy levels** across Ealing TC are relatively low benchmarked against West London and national averages, the published **market demand** for representation in the centre is relatively high<sup>2</sup>. There is therefore clearly an under-supply of new large shop units to meet the needs of modern retailers seeking space in the centre. This again reflects the fact that there has been no major investment in Ealing's retail offer and floorspace since the Arcadia Centre opened in 1986/7.
- 2.13 In terms of the quality of its retail and commercial leisure offer, it is also apparent that Ealing Town Centre is falling behind other Metropolitan and Major Centres in London.

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<sup>1</sup> This ranking is based on a number of key retail and town centre indicators. Please note that West Ealing was ranked 444<sup>th</sup> by VenueScore in 2006

<sup>2</sup> There were 102 retailers and leisure operators with stated requirements for Ealing Town Centre in April 2007, placing the centre 39<sup>th</sup> in the national rankings. It has consistently been in the 'top 50' since 2000.

2.14 Ealing Broadway has a range of mainstream fashion retailers, including Next, River Island, Wallis, Dorothy Perkins, Wallis, Evans, Top Shop and Warehouse (please note that Miss Selfridge has recently closed its store). However, when benchmarked against other competing West London centres, such as Richmond, Kingston and Brent Cross, there is a clear “**quality gap**” in Ealing’s choice of high end fashion and specialist retail offer. The table in Appendix 1 to this Briefing Paper illustrates some of the higher end retailers not currently represented in Ealing Broadway, including:

- Austin Reed
- Coast
- Disney Store
- Dune
- French Connection
- Gap
- H&M
- Hobbs
- Jigsaw
- Karen Millen
- La Senza
- Laura Ashley
- Lush
- Reiss
- Russell & Bromley
- TM Lewin
- Zara

2.15 Although some of these more ‘aspirational’ fashion retailers have previously been represented in Ealing and have recently moved out (such as Laura Ashley and Russell & Bromley), we nevertheless consider that a ‘step change’ is needed in the quality of Ealing’s overall fashion offer to help meet the potential challenge of existing and new competing locations in the West London area (such as White City and the proposed extension to Brent Cross). In our view an uplift in the scale and quality of Ealing’s retail offer should also help to ‘claw back’ a proportion of the more affluent and mobile shoppers living in the town’s catchment, but who are currently shopping elsewhere.

2.16 Also, following the recent closure of Beales (which is to be replaced by Primark) and the Daniels store redevelopment, there is no major (quality) **department stores** to anchor Ealing Broadway’s retail offer compared with other major centres in the West London area. We understand that Debenhams does have a potential requirement for representation in Ealing and we consider that it would provide a strong anchor to the town’s overall offer, as well as acting as a catalyst to help achieve a ‘step change’ in the quality of Ealing’s retail fashion offer.

2.17 With regard to **West Ealing**, its offer comprises some major national multiple retailers not represented in Ealing Broadway (such as BhS and Woolworths), as well as retailers represented in both centres (such as Boots and Superdrug). However, the centre’s comparison goods offer is mainly characterised by discount and value-led retailers, such as Peacocks, 99p Stores, Wilkinsons, Ethel Austin, QS Ladieswear and New Look. Marks and

- Spencer moved out of the centre in late 1990s and this store has since been redeveloped and occupied by Wilkinson's, with residential above ground floor level.
- 2.18 West Ealing also has a stronger role as a convenience goods shopping destination, comprising the recently extended Waitrose store on Alexandria Road and the Sainsbury store on Uxbridge Road, along with a popular market and smaller independent convenience and ethnic stores.
- 2.19 We consider that West Ealing should build on its role as a more value-led, affordable shopping location. This will complement the role of Ealing Broadway as the main fashion shopping and commercial leisure destination in the Borough. However, this does not mean that the centre can compromise on the quality of its shopping environment, and there is significant potential to improve its built form and public space.
- 2.20 The redevelopment and reprovision of the Sainsbury store represents one potential opportunity to improve West Ealing's retail offer and environment. The store is small and outdated by modern standards and would benefit from new investment and redevelopment, potentially by improving its frontage onto the Uxbridge Road. However, the costs of land assembly could be prohibitive. More detailed discussions with the operator and viability testing are needed to help deliver a new store and scheme, along with the potential need for the Council to exercise its CPO powers.
- 2.21 We also consider that West Ealing's ethnic and independent retail offer is particularly important to its future vitality and viability. This offer would be complementary to the new investment and development proposed for Ealing Broadway, which will strengthen the latter's more mainstream multiple retail offer. Finding a new permanent high quality accommodation for the market could also provide a major anchor to West Ealing's overall retail offer.
- 2.22 In terms of the **economic capacity** for new retail floorspace in Ealing Town Centre, the headline forecasts set out in our May 2007 *Property Market Review* provided a broad indication of the potential for new comparison goods retailing up to 2021.
- 2.23 These retail capacity forecasts draw on the key findings of the '2006 West London Study' (see for example Appendix 13, Table 23) and are based on an expenditure growth rate of +4.3% per annum and a 'productivity' growth rate for existing retail floorspace of +2.0% per annum. Full details of the underlying assumptions are set out in the 'West London Study'.
- 2.24 However, more recent forecasts produced by Experian Business Strategies (EBS) in November 2007 for comparison goods expenditure indicate a lower growth rate of +3.8% per annum. EBS state that these revised forecasts take better account of the impact of economic trends on consumer confidence and spending over the short to medium term.

2.25 We have therefore tested the sensitivity of the retail capacity forecasts for the following market share scenarios based on the 'lower' (+3.8% per annum) and 'higher' (+4.3% per annum) expenditure growth forecasts:

- **Scenario 1: 'Decline'** – Assumes no new development in Ealing. This scenario tests the potential impact of new commitments elsewhere in West London (such as White City) on the town centre's potential market share of comparison goods spend in Zones 4-10 (i.e. the zones that broadly represent the Borough area). We assumed in the '*West London Study*' that Ealing's market share from its core zones could fall from circa 35% in 2006 to 32% in 2011.
- **Scenario 2: 'No Change'** – Assumes that Ealing will be able, at the very minimum, to maintain its current market share of circa 35% from Zones 4-10 following new development and investment in the town centre (i.e. assume that Dickens Yard and the Arcadia redevelopment will lead to an improvement in the scale and quality of the town centre's retail and leisure offer) up to 2011.
- **Scenario 3: 'Growth'** – Assumes that Ealing will increase its market share over the forecast period following new development in the town centre. We assume that the scale and quality of new retail development proposed for the town centre (including a new department store anchor and 'high end' fashion retailing) would help to 'claw back' shoppers and spend currently leaking out of the core zones (i.e. 4-10) to existing shopping centres (such as Brent Cross), as well as new developments (such as White City). In this case we have assumed a relatively modest uplift in Ealing's overall market shares from Zones 4-10 from c.35% in 2006, to 38% by 2011, and rising to 40% by 2021<sup>3</sup>.

2.26 The tables below illustrate the range of capacity forecasts based on the different market share and spend growth scenarios<sup>4</sup>.

**Table 2.1: Summary of forecast capacity for additional comparison retail floorspace (sq.m net)  
Based on expenditure growth forecast of +4.3% per annum**

Market Share Scenarios for Zones 4-10 only	2011 (sq m net)	2016 (sq m net)	2021 (sq m net)
Scenario 1: Declining Market Share	280	10,423	22,020
Scenario 2: Constant Market Share	6,427	17,632	30,366
Scenario 3: Growth in Market Share	11,252	25,231	41,387

<sup>3</sup> Please note that these assumptions are only indicative and do not assume uplift in Ealing town centre's market share from other zones across the study area, or indeed the potential uplift that could occur in its trade draw from a wider area.

<sup>4</sup> The forecasts only provide a broad indication of the potential capacity for new floorspace up to 2021 and should not be treated as a 'threshold' for new development. The forecasts could be subject to further revision, depending on updates to the main assumptions and inputs to the model.

**Table 2.2: Summary of forecast capacity for additional comparison retail floorspace (sq.m net)  
Based on expenditure growth forecast of +3.8% per annum**

<b>Market Share Scenarios for Zones 4-10 only</b>	<b>2011 (sq m net)</b>	<b>2016 (sq m net)</b>	<b>2021 (sq m net)</b>
Scenario 4: Declining Market Share	-1,587	6,168	14,851
Scenario 5: Constant Market Share	4,357	12,973	22,542
Scenario 6: Growth in Market Share	9,022	20,146	32,699

2.27 The tables show that Ealing could have the potential capacity for between 10,423 sq.m and 25,231 sq.m net of additional comparison goods floorspace by 2016 based on different market share assumptions and the 'higher' spend growth forecast. The recently revised 'lower' spend growth forecast recommended by EBS results in a reduced capacity in 2016 of between 6,168 sq.m and 20,146 sq.m net.

2.28 We have advised the Council to treat these forecasts with caution. The capacity assessment should be regularly monitored and updated to take account of revisions to the baseline assumptions, population/spend growth forecasts and new developments/commitments. However, in planning policy terms we consider that it is realistic and reasonable to assume that Ealing Town Centre should, at the very least, maintain its current market share. We therefore consider that the capacity forecasts of between 12,973 sq.m and 17,632 sq.m net at 2016, based on the 'lower' and 'higher' growth forecasts, represent robust ranges in this case.

2.29 Ealing Council has subsequently provided GVA with an indication of the likely quantum of new floorspace proposed for the two major emerging retail/mixed use schemes in the town centre (i.e. Dickens Yard and the Arcadia Centre redevelopment). It is our understanding that the planning application for the Arcadia Centre redevelopment involves the demolition of the existing buildings on the site (with the exception of no.35 and no.30-34 The Broadway) and the construction of six buildings for a mix of residential, commercial / leisure uses, landscaping and car parking. The breakdown of the proposed uses is as follows:

<b>Use Class</b>	<b>Floorspace (Gross External Area)</b>
Residential	700 units
Class A1/A2	20,627 sq.m
Class A3	863 sq.m
Class B1	884 sq.m
Class D2	2,245 sq.m

Source: Arcadia Centre Redevelopment, Vol 3: Appendix 8b – Retail Statement (May 2007)

- 2.30 According to the Retail Statement submitted in support of the planning application, the overall increase in Class A floorspace equates to an additional 5,903 sq.m GEA. We assume that this GEA is equivalent to a net sales area of c.4,427 sq.m based on a conversion ratio of 75:25 net to gross (as set out in the supporting Retail Statement).
- 2.31 For Dickens Yard we understand that the emerging scheme will comprise circa 10,000 sq.m of retail, commercial and community space as set out in the table below:

**Dickens Yard: Proposed Breakdown of Uses and Floorspace**

Use	Floorspace
Residential	680 units
Class A1/A2	8,000 sq.m
Class A3	1,300 sq.m
Community	325 sq.m
Other	375 sq.m

Source: LB of Ealing

- 2.32 At the time of preparing this study, it was not clear as to whether the total retail floorspace is gross or net. Nevertheless, based on our assessment of the indicative plans we have assumed that the 8,000 sq.m represents net additional retail floorspace.
- 2.33 Therefore, in combination these two major proposed town centre developments could result in an increase of circa 12,427 sq.m net in Ealing Broadway's existing comparison goods floorspace stock.
- 2.34 Benchmarked against both our 'high' and 'low' growth capacity forecasts, this new floorspace will account for all the forecast capacity for Ealing Town Centre up to 2011. Assuming constant market shares, by 2016 we forecast that there could be a residual floorspace capacity of circa 5,205 sq.m net based on the 'higher' spend growth scenario (Scenario 2), or circa 550 sq.m assuming the 'lower' growth scenario (Scenario 5).

## Ealing Town Centre: Commercial Leisure Futures

- 2.35 The May 2007 'Property Market Review' indicated that there is a good choice of branded and independent cafés, restaurants and bars in Ealing. These are currently mainly clustered in Ealing Broadway on the Mall, Haven Green (to the north of the station), Bond Street and along the Uxbridge Road. This offer is complemented by specialist ethnic restaurants and take-aways in West Ealing.
- 2.36 Nevertheless, we consider that the choice of quality restaurants and bars in Ealing Broadway is more limited than in other competing centres in West London, such as Chiswick, Richmond

- and Kingston for example. The table in Appendix 1 shows, for example, that operators such as Wagamama, Yo Sushi, Nandos and Pret A Manger are not currently represented in Ealing.
- 2.37 Furthermore, the most recent list of requirements from restaurant/café operators for representation in Ealing indicates interest from a number of quality players, including ASK, Smollensky's, Zizzi and Lupa. In total, existing requirements amount to between 2,500 – 5,000 sq.m gross of new floorspace.
- 2.38 We therefore consider that there is an opportunity for new development and investment to provide an enhanced food and drink offer in Ealing Broadway. This would be balanced by the strengthening of the specialist and ethnic food and drink offer in West Ealing and towards the western end of the Uxbridge Road, between Ealing Broadway and West Ealing.
- 2.39 Ealing has several privately operated **health & fitness/leisure centres** in Ealing Broadway. There are currently no private leisure centres and/or health clubs in West Ealing, which represents a potential 'gap' in the market. There are also no Council-operated leisure centres in either Ealing Broadway or West Ealing. The West London Study highlighted the fact that health and fitness provision is less dense in the western part of Ealing although provided the market demand is there, and the sites exist, health & fitness clubs should usually be encouraged within town centres and within mixed-use retail/residential schemes.
- 2.40 Ealing has only one small and outdated **cinema**, namely the 3-screen Empire cinema along the Uxbridge Road. Planning permission was granted in 2003 to redevelop the site to provide a 16-screen multiplex but development has not started. There is no cinema in West Ealing following the closure of the 'Bollywood' Cinema on Northfield Avenue, which has since been developed for residential with ground floor uses. The West London Study highlighted capacity for an additional 12 (2006), 19 (2011) and 34 (2021) cinema screens within West London to meet demand from future population growth. In Ealing, even if the Empire cinema is redeveloped as planned, the West London Study indicated that there would still be a qualitative deficiency in the west of Ealing borough for a smaller mainstream cinema (of circa 3-6 screens).
- 2.41 Ealing does not have any other commercial leisure operators. The West London Study noted that **bingo** provision is particularly limited in Ealing and concluded that if there are sites available, and the market demand is there, additional bingo club provision could fill gaps in the central and western parts of the Borough. It also identified the following potential need:
- In terms of **ten pin bowling**, the West London Study states that further facilities could be supported in the western part of Ealing Borough; and

- there is sufficient expenditure capacity in West London to justify the development of new **casino** facilities, given that Ealing currently has no major Casino venues.

2.42 There is an independent theatre ('Questors') in Ealing Broadway that stages high quality amateur productions, but it is situated behind the main shopping centre on Mattock Lane. We consider that it could benefit from a more high profile location and/or promotion within Ealing Broadway. There are also several museums and art galleries close to the town centre, which would also benefit from more high profile locations and/or stronger promotion.

2.43 There are currently no branded hotels within Ealing town centre, apart from a Ramada Hotel by Ealing Common. Although there are several small independent operators on the edge of the centre, many of these are poor by modern standards. We therefore consider that there could be a need for high end and/or budget hotel to be provided as part of the town's overall offer.

## 3. OFFICE FUTURES

- 3.1 This section sets out our assessment of future office market demand and projected floorspace requirements for Ealing Town Centre, building on the key findings of the May 2007 report.
- 3.2 In order to complete this exercise, we have carried out a high-level assessment that has sought to determine current levels of office-related employment and projected future growth in the Town Centre up to 2021. We have then applied this growth rate to baseline office floorspace stock in the Town Centre to estimate future floorspace requirements. We have then compared this analysis to the GLA London Office Policy Review (August 2006).
- 3.3 Our findings and analysis is set out in more detail below.

### Projected Employment Growth

- 3.4 Using GLA Employment Forecasts and Annual Business Enquiry (ABI) Employee analysis (2006 data), we have established the following employment forecasts for Ealing and Ealing Town Centre:
- Total employment in Ealing – circa 138,000
  - Office related employment – 33,231 (i.e. people employed in Financial and Business Services sector)
  - ABI ward level employment data indicated that an estimated 40% of current office related employment is located in Ealing Town Centre (approximately 14,400 employees)
  - Office-related employment projected to grow by 8%, 20% and 26% from 2006 up to 2011, 2016 and 2021 respectively (office-related employment taken to be from defined Financial and Business Services sector)

### Projected Floorspace Requirement

- 3.5 Valuation Office Agency data set out within our May 2007 Property Market Review estimated that the total stock of office floorspace in Ealing in 2006 was 443,000 sq.m (circa 4.8 million sq.ft).
- 3.6 Earlier analysis established that approximately 40% of current office related employment is located within Ealing Town Centre. On this basis, it can be estimated that the total stock of office floorspace within Ealing Town Centre is approximately 180,000 sq.m (circa 1.9 million sq.ft). This figure is likely to represent an upper estimate, as town centre offices will tend to be at a higher density than out-of-town locations.

3.7 We have applied forecasted employment growth rates to the existing stock of office floorspace in Ealing Town Centre to estimate the following future floorspace requirements. These figures are inclusive of an 8% vacancy rate and are based on the assumption that office employment densities remain constant. The figures show a range assuming that 40-60% of new additional floorspace will be accommodated within the Town Centre. In order to reflect the net additional requirement, we have also deducted a corresponding proportion of the GLA estimated pipeline stock from extant and non-completed planning permissions (approximately 12,700 and 19,000 sq.m at 40% and 60% respectively).

**Table 3.1: Projected Floorspace Requirement for Ealing Town Centre based on Existing Stock**

	2006 – 2011	2006 – 2016	2006 – 2021
Net Additional Requirement (sq.m)	2,000 – 4,000	26,000 – 38,000	37,000 – 55,000

3.8 The table shows that, based on office employment projections, there will be a net additional requirement for approximately 2,000 – 4,000 sq.m of office floorspace in Ealing Town Centre up to 2011. This reflects the large amount of pipeline stock estimated by the GLA to be either under construction or in extant planning permissions. It should be noted, therefore, that this assumes that all of the extant planning permissions will be implemented.

3.9 However, the table also shows that there will be a net additional requirement for approximately 26,000 – 38,000 sq.m (280,000 – 410,000 sq.ft) and 37,000 – 55,000 sq.m (400,000 – 590,000 sq.ft) of office floorspace in Ealing Town Centre up to 2016 and 2021 respectively.

3.10 It should be noted that these estimates are based purely on employment estimates. As such, no account is taken of future market forces. Although these estimates do not utilise employment density ratios, they implicitly assume that densities will remain constant up to 2021. These estimates also assume that 40-60% of new additional office floorspace will be located specifically in Ealing Town Centre. The lower range reflects current proportions estimated from ABI employment data while the upper range reflects future demand and policy promoting Town Centre development.

## London Office Policy Review (August 2006)

3.11 In order to supplement the above analysis, we have had regard to the London Office Policy Review (August 2006). This estimates that Financial and Business Services Employment in Ealing is projected to grow by circa 8,600 between 2006 and 2021. Based on this growth assumption, the report estimates additional office space requirements for Ealing as follows:

- 422,878 sq.ft up to 2011

- 1,077,077 sq.ft up to 2016
- 1,396,995 sq.ft up to 2021

3.12 These estimates assumed an increasing scale of office employment density and an 8% Vacancy Rate.

3.13 The GLA report then estimated that at the end of 2005, there was a total of approximately 31,700 sq.m (341,000 sq.ft) of office floorspace either under construction or in extant planning permissions. On the assumption that 40-60% of required floorspace will be accommodated in the town centre, the GLA data would indicate the following office floorspace demand:

**Table 3.2: Projected Floorspace Requirement for Ealing Town Centre based on GLA Employment Densities**

	2006 – 2011	2006 – 2016	2006 – 2021
Net Additional Requirement (sq.m)	3,000 – 5,000	27,000 – 41,000	40,000 – 60,000

## Summary Projection

3.14 The two approaches detailed above have provided comparable estimates of future office floorspace requirements in Ealing Town Centre. Based on the two approaches, the following net additional office floorspace estimates have been calculated for Ealing Town Centre up to 2021:

**Table 3.3: Summary Projected Floorspace Requirement for Ealing Town Centre**

	2006 – 2011	2006 – 2016	2006 – 2021
Net Additional Requirement (sq.m)	2,000 – 4,000	25,000 – 40,000	40,000 – 60,000

## 4. RESIDENTIAL FUTURES

- 4.1 The following analysis looks at the recent performance of the residential property market in Ealing. This section will focus on property price growth, recent completions and residential planning permissions and pipeline development.

### Market Overview

- 4.2 In May 2007 GVA prepared a Property Market Baseline Report for Ealing Town Centre. This demonstrated that there has been a strong level of demand for residential property in Ealing in recent years. This is highlighted by an estimated growth in property prices of 224% over the last ten years between 1996 and 2006. This compares favourably with London as a whole, which has experienced an estimated 218% rise in average house price growth over the same period.
- 4.3 Enquiries made of local residential agents indicated that house prices are expected to continue to grow at a strong rate. There is high demand in Ealing with agents reporting increased levels of registration.
- 4.4 Our baseline report found that demand for property in Ealing appears to be coming from people moving out of central London as they can get more space for their money due to lower average prices of semi-detached and detached properties.
- 4.5 The report demonstrated that there has been increasing demand for detached and semi-detached properties as reflected by rising average prices. This supports the contention that demand is coming from young families and professional couples looking to upgrade their space from central London.
- 4.6 With regard to Ealing Town Centre, continual strong demand for housing in London will mean that there will be a market for all types of property including high density accommodation, particularly in sustainable locations close to Central London transport links.

### Future Requirement

- 4.7 The adopted housing target for the London Borough of Ealing for the period 2002 – 2017 is 9,750 units (650 dwellings per annum). However, In July 2005, the GLA published the results of the 2004 Housing Capacity Study. A revised target of 915 per annum for Ealing for the remaining 10-year plan period from 2007 – 2017 was included in the Draft Alterations to the London Plan, published in October 2005. This means that the Ealing will have to make provision for a total of 9,150 dwellings over the next 10-years.

- 4.8 The London Borough of Ealing Annual Monitoring Report (2005 – 2006) estimates that as at mid-2006, extant planning permissions equate to a net pipeline of approximately 2,100 units. If it is assumed that all of these planning permissions will be implemented, there would be a residual requirement in Ealing of approximately 7,050 units up to 2017.
- 4.9 Please note that we have not assessed the type and mix of new residential units planned and proposed for the town centre. Nevertheless, it is clear that the 680 new units proposed for the Dickens Yard scheme, along with the 700 units for the Arcadia redevelopment, will represent a significant uplift in Ealing's population and available spend to support existing and new facilities.

## **APPENDIX 1:**

### **Ealing Town Centre – Retail and Leisure Offer**

Operator	Ealing Broadway	West Ealing	Richmond	Kingston	Chiswick	Watford	Brent Cross	Bluewater
Accessorize	Y	N	Y	Y	N	Y	Y	Y
Austin Reed	N	N	N	Y	N	N	Y	Y
Baratts	Y	N	N	Y	N	Y	Y	Y
Blacks	Y	N	Y	Y	Y	N	Y	Y
Boots	Y	Y	Y	Y	Y	Y	Y	Y
Clarks	Y	N	Y	Y	Y	Y	Y	Y
Clintons	Y	Y	Y	Y	Y	Y	Y	Y
Coast	N	N	Y	Y	N	Y	N	Y
Disney Store	N	N	N	Y	N	Y	N	Y
Dorothy Perkins	Y	N	N	Y	N	Y	Y	Y
Dune	N	N	N	N	N	N	Y	Y
Fat Face	Y	N	Y	Y	N	N	Y	Y
French Connection	N	N	Y	Y	N	Y	Y	Y
Gap	N	N	Y	Y	N	Y	Y	Y
H&M	N	N	N	Y	N	Y	Y	Y
Hobbs	N	N	Y	Y	N	N	Y	Y
JD Sports	N	N	N	Y	N	Y	Y	Y
Jigsaw	N	N	Y	Y	N	N	Y	Y
John Lewis	N	N	N	Y	N	Y	Y	Y
Karen Millen	N	N	Y	Y	N	N	Y	Y
Kew	N	N	N	Y	Y	N	Y	Y
La Senza	N	N	N	Y	N	Y	Y	Y
Laura Ashley	N	N	Y	Y	N	Y	N	Y
Lush	N	N	N	Y	N	N	N	Y
Marks and Spencer	Y	N	Y	Y	N	Y	Y	Y
Monsoon	Y	N	Y	Y	N	Y	Y	Y
Mothercare	Y	N	N	Y	N	Y	Y	Y
Oasis	Y	N	Y	Y	N	Y	Y	Y
Office	Y	N	N	Y	N	Y	Y	Y
Reiss	N	N	Y	Y	N	N	Y	Y
River Island	Y	N	Y	Y	N	Y	Y	Y
Russell & Bromley	N	N	Y	Y	N	N	Y	Y
Timpson	Y	N	Y	Y	N	Y	Y	Y
TM Lewin	N	N	N	Y	N	N	Y	Y
Topshop	Y	N	Y	Y	N	Y	Y	Y
WH Smith	Y	N	Y	Y	Y	Y	Y	Y
Zara	N	N	N	Y	N	Y	Y	Y
<b>TOTAL</b>	<b>17</b>	<b>2</b>	<b>22</b>	<b>36</b>	<b>6</b>	<b>25</b>	<b>33</b>	<b>37</b>

Operator	Ealing Broadway	West Ealing	Richmond	Kingston	Chiswick	Watford	Brent Cross	Bluemwater
BB's Coffee and Muffins	Y	N	N	N	N	Y	Y	Y
Burger King	Y	Y	N	N	N	Y	Y	Y
Carluccios	Y	N	Y	Y	Y	N	Y	Y
Costa Coffee	Y	N	Y	Y	N	Y	Y	Y
La Tasca	Y	N	N	Y	Y	Y	N	Y
Loch Fyne	N	N	N	N	N	N	N	Y
McDonalds	Y	N	Y	Y	Y	Y	Y	Y
Milles Cookies	N	N	N	N	N	Y	Y	Y
Nandos	N	N	Y	Y	Y	Y	N	Y
Pizza Express	Y	N	Y	N	Y	Y	N	Y
Pret A Manager	N	N	Y	Y	N	N	N	Y
Starbucks	Y	N	Y	Y	Y	Y	Y	Y
Thomtons	N	N	N	Y	N	Y	Y	Y
Tootsies	N	N	Y	N	Y	N	Y	Y
Wagamama	N	N	Y	Y	N	N	Y	N
Yo Sushi	N	N	N	N	N	N	Y	Y
<b>TOTAL</b>	<b>8</b>	<b>1</b>	<b>9</b>	<b>9</b>	<b>7</b>	<b>10</b>	<b>12</b>	<b>16</b>

**APPENDIX 2:**

**Ealing Town Centre Quantitative Retail Capacity Assessment -  
Scenario Testing**