

Ealing Town Centre Retail & Leisure Study

London Borough of Ealing | April 2017



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For and on behalf of GVA Grimley Ltd

1 INTRODUCTION

- 1.1 GVA are instructed by the London Borough of Ealing to prepare the Ealing Town Centre Retail Study. The report sets out the role and status of the 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 in accordance with guidance set out in the NPPF and accompanying Planning Practice Guidance (PPG). The outputs draw conclusions in respect of the centre's overall performance, and identifies future requirements in respect of investment, development and change in order to retain Metropolitan Centre status.

Background

- 1.2 The reason for this study is to ensure an up-to-date evidence base in response to the Inspectors recommendation at the Examination into the Core Strategy (November 2011). It was concluded that an updated retail needs study would be undertaken within the next 5 years, i.e. 2017. This requirement was clearly set out in the Inspector's report to Ealing Council in February 2012:

*The London Boroughs of Ealing, Hounslow and Hammersmith and Fulham Joint Retail Needs Study 2010 [EB28] updated the West London Retail Needs Study 2006 [EB27]. In the light of the statements made querying the retail evidence base, a further paper was produced in October 2011 [ED93]. This concluded that, despite the uncertainty over growth rates in the current economic climate, the evidence in the studies which underpin the CS remained robust and credible. **The Council has committed to review the delivery of and demand for retail floorspace through the Annual Monitoring Report and an updated retail needs study would be undertaken within the next 5 years.** This would be the time for any adjustments found necessary in the light of market conditions. The CS covers the period up to 2026 and provides for an additional 'up to' floorspace for each of the identified centres based on the findings in ED28. This gives the degree of flexibility necessary in the light of the current economic circumstances. At this time, I find no soundness reason for a different approach from that provided for in the robust and credible evidence base.*

[Para.50, Report on the Examination into Development Strategy Development Document, February 2012]

- 1.3 The role of Ealing as a 'Metropolitan' Town Centre is fundamental to ensuring the borough's ability to compete effectively within the sub-regional town centre network. In order to ensure its continued strength, vitality and viability, the London Borough of Ealing have commissioned a two-stage methodology as follows:

Stage 1: Ealing Town Centre Retail Study: A focused study into the performance, health and future potential of Ealing Metropolitan Centre;

Stage 2: A Borough-wide evidence based report into the qualitative and quantitative performance of the network of town centres, and the identification of a suitable strategy for each to facilitate future enhancement, growth and change.

- 1.4 This study forms Stage 1.

Report Structure

- 1.5 This study incorporates the following key steps:

- **Policy Review:** specifically identifying development opportunities and the extent to which development plan aspirations have been achieved;
- **National Retail and Leisure Trends:** in order to understand how town centres are changing and what is driving their growth and vitality into the future;
- **Sub-Regional Context:** sets Ealing in context in the sub-region to help gauge the wider catchment performance of competing town centres;
- **Ealing Town Centre:** a detailed town centre health check to analyse the centre's performance against key national guidance indicators (set out in the NPPG). This section will also provide an update on development plan town centre site allocations;
- **Benchmarking of Centres:** a benchmarking exercise, identifying how Ealing town centre is performing as a Metropolitan Centre in comparison with the network of London Metropolitan Town Centres;
- **Conclusions and Recommendations:** drawing together key work elements to understand the extent to which the development plan has been implemented, the performance of Ealing town centre in the context of key performance indicators, benchmarking with competing centres and the network of Metropolitan Town Centres across London, and the need for future investment and change moving forwards. The outputs will specifically identify any shortfalls in provision/performance and recommend the most appropriate means to meet this shortfall.

2 POLICY FRAMEWORK

- 2.1 In this section we summarise the key features of national and local planning policy guidance which provide the context and framework for the remainder of this study.

National Planning Policy Framework (NPPF) March 2012

- 2.2 The National Planning Policy Framework (NPPF), published on 27 March 2012, sets out the Government's planning policies for England and replaces the suite of national Planning Policy Statements, Planning Policy Guidance and Circulars with a single document.
- 2.3 The NPPF continues to recognise that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each Local Planning Authority (LPA) should produce a single Local Plan for its area with any additional documents to be used only where clearly justified.

Plan Making

- 2.4 The NPPF maintains the general thrust of previous policy set out in PPS4 – Planning for Sustainable Economic Growth (2009). It 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. In planning for town centres LPAs should:
- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
 - Define a network and hierarchy of centres that are resilient to anticipated future economic changes;
 - Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
 - Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
 - Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
 - Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site

availability. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;

- Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available;
 - Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
 - Recognise that residential development can play an important role in ensuring the vitality of centres; and
 - Where town centres are in decline, plan positively for their future to encourage economic activity.
- 2.5 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia:
- The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
 - The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
 - The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
 - The capacity of existing centres to accommodate new town centre development.
- 2.6 Local Plans will be examined by an independent inspector whose role it is to assess whether the plan is sound. In order to be found sound the Plan should be:
- Positively prepared i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements
 - Justified i.e. the most appropriate strategy, when considered against the alternatives;
 - Effective i.e. deliverable over its plan period and based on effective joint working; and
 - Consistent with national policy i.e. enable the delivery of sustainable development

Development Control

- 2.7 The NPPF adopts a positive approach, with a presumption in favour of sustainable development and support for economic growth in order to meet the development

needs of the local area. In terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise. Paragraphs 24-27 confirm the policy requirements for assessing proposed new retail floorspace.

- 2.8 Paragraph 24 states that Local Planning Authorities should apply a sequential approach to planning applications for main town centre uses which do not fall within an existing centre and are not in accordance with an up-to-date Local Plan. They should require applications for main town centre uses to be located within town centres, followed by edge of centre locations and if no suitable sites are identified only then should out of centre sites be considered. In determining edge of centre and out of centre applications, preference should be given to accessible sites that are well connected to the town centre. Both applicant and local authority are requested to demonstrate flexibility on issues such as format and scale.
- 2.9 Paragraph 26 requires Local Planning Authorities to request an impact assessment on applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, if the development is over a proportionate, locally set threshold. If no threshold is set then a default threshold of 2,500 sq m should be applied. Paragraph 27 directs Local Planning Authorities to refuse an application where it fails to satisfy the sequential approach, or is likely to have significant adverse impact on one or more of the factors listed under Paragraph 26, including:
- The impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal.
 - The impact of the proposal on the vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made.
- 2.10 Overall, the NPPF adopts a positive approach, with a presumption in favour of sustainable development and support for economic growth. The NPPF is a material consideration in planning decisions.

National Planning Policy Guidance (NPPG) (2014)

- 2.11 In March 2014 the Department for Communities and Local Government (DCLG) launched the online planning practice guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource provides guidance on how to assess and plan to meet

the needs of main town centre uses in full through the production of a positive vision or strategy for town centres.

Permitted Development

- 2.12 The Town and Country Planning (General Permitted Development) (England) Order 2015 has introduced greater flexibility to enable a more straightforward change of use within shopping frontages. The amendments allow permitted change from retail premises (A1) to financial services (A2), and restaurants and cafes (A3) without a time limit on that change of use. The move is designed to reduce vacancies on high streets, but a consequence is that local authority retail frontage policies can be bypassed unless alternative mechanisms are in place.

London Plan (2016)

- 2.13 In March 2016, the Mayor adopted the London Plan (consolidated with alterations since 2011). This consolidated plan is now operative as formal alterations to the London Plan and forms part of the development plan for Greater London. It is a strategic spatial planning document setting the London-wide context within which individual London Boroughs must set their local planning policies. The London Plan forms part of the 'Development Plan' for the purposes of development control and planning decisions, and local policy frameworks must be 'in general conformity'.
- 2.14 Ealing is classified as a Metropolitan Centre within the London-Wide retail hierarchy (Table A2.1, Annex 2 & Map 2.6, p.83). To set this in context, paragraph A2.3, Annex 2 defines the town centre 'categories' within London; there are five broad types which perform different but complementary roles:
- **International centres** (West End, Knightsbridge) – London's globally renowned retail destinations with a wide range of high-order comparison shopping with excellent levels of public transport accessibility.
 - **Metropolitan centres** (i.e. Bromley, Croydon, Ealing) – serve wide catchments which can extend over several boroughs and into parts of the wider South East region. Typically they contain at least 100,000 sq m of retail, leisure and service floorspace with a significant proportion of high-order comparison goods relative to convenience goods. These centres generally have very good accessibility and significant employment, service and leisure functions.
 - **Major Centres** – typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000 sq m of retail, leisure and service floorspace with a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.
 - **District Centres** – distributed more widely than the Metropolitan and Major Centres, providing convenience goods and services for more local communities and

accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 SQ M of retail, leisure and service floorspace. Some District Centres have developed specialist shopping functions.

- **Neighbourhood and more local centres** – typically serve a localised catchment often most accessible by walking and cycling and include local parades and small clusters of shops, mostly for convenience goods and other services. They may include a small supermarket (typically up to around 500 SQ M), sub-post office, pharmacy, Laundrette and other useful local services. Together with District Centres they can play a key role in addressing areas deficient in local retail and other services.
- 2.15 Policies 2.15 and 4.7-4.8 of the London Plan provide the strategic framework for town centre policy development and implementation.
- 2.16 Policy 2.15 has a strategic focus primarily for sustaining the vitality and viability of the existing network of town centres and co-ordinating their development to sustain and improve a competitive choice of goods and services. In the preparation of Local Plans, boroughs are encouraged to sustain and enhance the vitality and viability of centres; in particular, taking realistic account of changes in consumer behaviour and the impact of internet and multi-channel shopping, identifying town centre boundaries and frontages, and relating the existing and planned role of a centre to the wider network to achieve its broader objectives.
- 2.17 Policy 2.15 also encourages local authorities to proactively manage the changing roles of centres, especially those with surplus retail and office floorspace, considering the scope for consolidating and strengthening them by encouraging a wider range of services. Local authorities might also consider promoting diversification, particularly through high density, residential led, mixed use re-development and allowing greater flexibility for non-A1 retail uses in secondary shopping frontages where relevant.
- 2.18 Paragraph 2.72 clarifies that a wide range of uses will enhance the vitality and viability of town centres. These include leisure uses which contribute to London's evening economy, higher density housing, the redevelopment or conversion of redundant offices or under-used space above shops, and a range of civic services and facilities.
- 2.19 Paragraph 2.72c states that across the capital as a whole, growth in the requirement for additional floorspace may contract relative to historic expectations. However, beneath this headline figure the changing shopping habits and expectations of London's expanding and dense population are likely to give rise to significant demand for modern, more efficient forms of retailing. The London Plan adds that as far as possible, this should be met through redevelopment of existing capacity, largely within or on the edge of town centres.
- 2.20 Paragraph 2.74 emphasises that the current role of town centres should be tested through regular town centre 'health checks', and that this process should ensure that the network is sufficiently flexible to accommodate change in the role of centres and their relationships to one another. Centres can be reclassified and, where appropriate, new centres designated, through subsequent reviews or alterations to the London Plan and DPDs. Health checks should be undertaken as part of each London Boroughs local plan review and as part of the GLA's wider town centre health check assessments.
- 2.21 Annex 2 incorporates Ealing within the 'medium growth' town centre category (paragraph A2.6), i.e. town centres with moderate levels of demand for retail, leisure or office floorspace and with physical and public transport capacity to accommodate it. This falls below the 'high growth' threshold which includes those centres likely to experience strategically significant levels of growth, and above the 'low growth' threshold which includes those centres that are encourage to pursue a policy of consolidation.
- 2.22 Annex 2 also indicates potential future changes to the classification of town centres in the network over the Plan Period. Ealing is not identified for any potential reclassification, but amongst the higher order centres, Woolwich, Canary Wharf and Brent Cross are identified (Table A2.2, p.374) as having the potential to be reclassified upwards to a Metropolitan Centre (alongside Ealing) over the Plan Period.
- 2.23 Policy 4.7 focuses on Retail and Town Centre Development, emphasising that the Mayor supports a strong, partnership approach to assessing need and bringing forward capacity for retail, commercial, culture and leisure development in town centres. In preparing Local Plans, Policy 4.7 states that boroughs should:
- Identify future levels of retail and other commercial floorspace need;
 - Undertake regular town centre health checks to inform strategic and local policy and implementation;
 - Take a proactive partnership approach to identify capacity and bring forward development within or, where appropriate, on the edge of town centres;
 - Firmly resist inappropriate out of centre development;
 - Manage existing out of centre retail and leisure development in line with the sequential approach, seeking to reduce car dependency, improve public transport, cycling and walking access and promote more sustainable forms of development.
- 2.24 In taking planning decisions on proposed retail and town centre development, the following principles should be applied:
- The scale of retail, commercial, culture and leisure development should be related to the size, role and function of a town centre and its catchment;
 - Retail, commercial, culture and leisure development should be focused on sites within town centres, or if no in-centre sites are available, on sites on the edges of

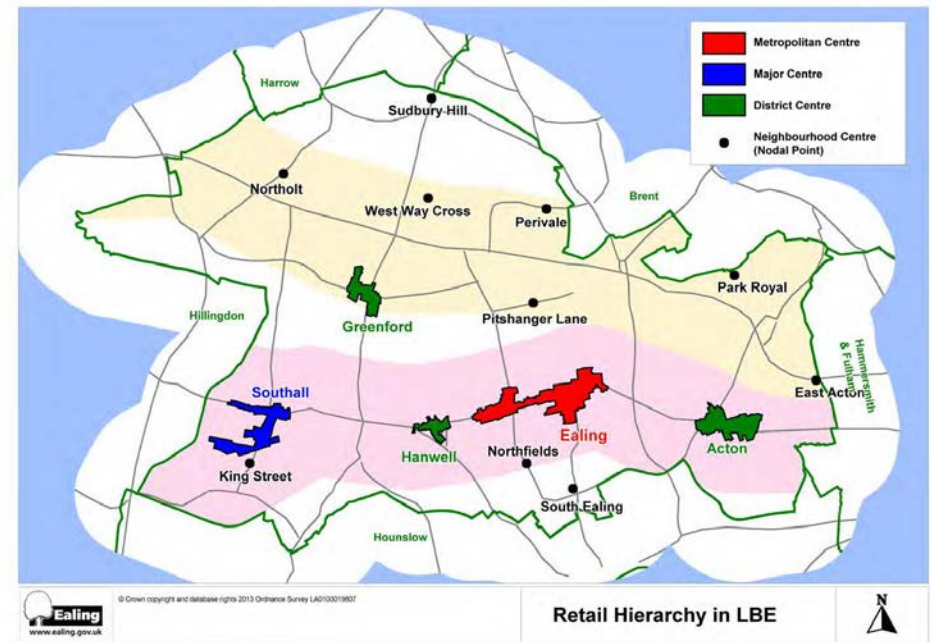
centres that are, or can be, well integrated with the existing centre and public transport.

- 2.25 The London Plan draws on data published by Experian, which suggests that household expenditure is likely to rise from £124 billion in 2011 to over £234 billion by 2036, whilst London household expenditure on comparison goods retail is projected to rise from £23 billion in 2011 to over £48 billion by 2036. In this context, paragraph 4.40 sets out that London could have a baseline need for an additional 0.9-2.2 million sq m of comparison goods retail floorspace by 2036 – this is broadly equivalent to 20+ shopping centres the scale of Westfield Stratford City. Ealing is in a good position with medium growth potential to help meet this need for comparison goods floorspace arising in London.
- 2.26 Policy 4.8 supports successful and diverse retail, and in the context of planning decisions and local plan preparation, boroughs are directed to take a proactive approach to planning for retail. In particular, Local Plans are instructed to bring forward capacity for additional comparison goods retailing particularly in International, Metropolitan (including Ealing) and Major Centres. The supporting text adds that larger centres are appropriate locations for accommodating much of the growth in comparison goods retail expenditure and floorspace because they are the most accessible by public transport and have greater capacity to provide choice and competition.

Development Strategy 2026 (April 2012)

- 2.27 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.
- 2.28 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 centre in accordance with the established shopping hierarchy (Policy 1.1(d) (Figure 3.1). The vision is to harness opportunities for growth and development and promote improvement in appropriate locations. These locations are primarily along the 'Uxbridge Road/Crossrail' and the 'A40/Park Royal' corridors – illustrated on Figure 3.1. Five Crossrail stations are located throughout the Ealing southern corridor, and will provide a major impetus for growth and development.
- 2.29 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 retail floorspace over the Plan period (**borough-wide**). This retail floorspace will be primarily directed towards The Uxbridge Road/Crossrail corridor (including Ealing town centre and around Ealing Broadway Station) and The A40/Park Royal corridor.

Figure 3.1: Retail Hierarchy in London Borough of Ealing



- 2.30 Core Strategy Policy 2.5 identifies strategies to revitalise Ealing Metropolitan Centre, while sustaining and enhancing its position in the London retail hierarchy. Part(a) of the policy states that the regeneration of Ealing Metropolitan Centre can be realised through the provision of new homes, shops, offices, sport and leisure and other public facilities, resulting in a diverse and vibrant centre. It provides a target to provide up to 50,000 sq m gross retail floorspace, with potential development sites specified in the Development Sites DPD, including Dickens Yard, Arcadia, Lamertons, Ealing Broadway Shopping Centre, and the Office Quarter between Ealing Broadway and West Ealing.
- 2.31 Part (b) of the policy aims to define and reinforce the distinctive character and roles of different parts of the town centre, including different quarters:
- **Ealing Broadway**, which is recognised as a high quality retail destination;
 - **Ealing Green**, which is seen to fulfil more of a cultural, community and educational role;
 - **West Ealing**, which comprises of contrasting retail offer of value and convenience goods and a wide range of eating places; and

- The section of Uxbridge Road between Ealing Broadway and West Ealing, which is seen as the location of high quality head offices and ancillary functions.

- 2.32 Part (c) states that development and change must strengthen and extend the retail core of the town centre leading to an increase in the quantum, quality and diversity of the existing retail/leisure offer and sustain the town centre's position in the retail hierarchy. Part (e) aims to protect and enhance the quality of the existing townscape and historic character, and Part (f) recommends public realm and transport improvements for Ealing Broadway and West Ealing to cater for Crossrail services.
- 2.33 Part (g) encourages the provision of a comprehensive range of cultural, heritage, social, sport and leisure facilities, including a boutique hotel, cinema, additional restaurants and cafes, and improvements to the Questors Theatre and Ealing Town Hall and Pitzhanger Manor.

Adopted Policies Map (2013)

- 2.34 LB Ealing's Adopted Policies Map illustrates the boundary of Ealing Metropolitan Town Centre, encompassing Ealing Broadway and West Ealing, as shown in Figure 3.2. The map identifies primary and secondary shopping frontages, and given their reach, it can be concluded that the 'town centre' allocation forms the Primary Shopping Area for the purposes of retail policy. Eighteen development sites are identified, with all but one being located within the Primary Shopping Area. We discuss these further below.

Figure 3.2: Ealing Metropolitan Centre Policy Allocations



Development Sites DPD (December 2013)

- 2.35 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.
- 2.36 Ealing Metropolitan Centre is the location for a number of allocated development sites. As noted when discussing the adopted policies map, there are 18 development sites in and around the town centre, 17 of which are located within the Primary Shopping Area. Those considered relevant to this study are set out below.

EAL1 Eastern Gateway (51 – 53 The Mall)

- 2.37 With a site area of 0.20ha, the site is allocated for mixed use development appropriate to the town centre including replacement office. It is identified as an opportunity to enhance the townscape at the eastern entrance to the town centre.

Current Site Status: No Change.

EAL2 Ealing Broadway Crossrail Station

- 2.38 With a site area of 1.64ha, the site is allocated for mixed use development appropriate to the town centre, compatible with the function of Ealing Broadway Station as a strategic public transport interchange. Ealing Broadway Station will be significantly upgraded as part of Crossrail, with the construction of a new station entrance and associated public realm improvements. These changes support the provision of additional development above and around the station, including the demolition or substantial refurbishment of Villiers House.

Current Site Status: Under Construction

EAL3 Arcadia (The Broadway / Springbridge Road / Haven Green Ealing)

- 2.39 With a site area of 1.78ha, the site is allocated for mixed use development appropriate to the town centre, including additional retail, commercial, leisure/entertainment and residential. The existing buildings on the site are considered insufficient to accommodate the scale, range or quality of retail offer required to support the vitality and viability of the town centre, and their comparatively low intensity of development underutilises a key town centre site adjacent to the station. The text makes reference to the 'Arcadia Site Supplementary Planning Document'.

Current Site Status: Part Implemented (McDonalds/TK Maxx/Morrison's). Remainder of site subject to Call-In Inquiry (Ref: APP/A5270/V/16/3151295) scheduled for May 2017.

EAL4 Ealing (Broadway Shopping Centre / The Broadway / High Street)

- 2.40 With a site area of 3.58ha, the site is allocated for refurbishment and where possible redevelopment to provide mixed use development appropriate to the town centre including additional retail, commercial, leisure/entertainment, residential and community. The current configuration of the shopping centre forms a large, inward-facing urban block with poor permeability that creates barriers to pedestrian movement and is detrimental to the overall legibility of the town centre. The centre had received limited investment since opening in 1981, but current owners, British Land, are currently rolling out a refurbishment programme.

Current Site Status: Refurbishment on-going.

EAL5 Sandringham Mews (High Street/New Broadway/Sandringham Mews)

- 2.41 With a site area of 0.63ha the site is allocated for mixed use development appropriate to the town centre, with the potential for student accommodation. Current uses on the triangular shaped site to the west of The Broadway Shopping Centre include retail, restaurants/cafes, public house and surface level car park. EAL5 presents an opportunity to enhance the townscape while making more efficient use of the site.

Current Site Status: No Change.

EAL6 Cinema (59-63 New Broadway / 14-22 Bond Street / 1 Mattock Lane)

- 2.42 With a site area of 0.88ha the site is allocated for mixed use development appropriate to the town centre, including multiscreen cinema, retail, commercial and residential. The outstanding planning permission for the multiscreen cinema will provide a significant leisure development within the town centre, which Ealing currently lacks, and restore the retained façade as a key townscape element. Development of the wider site with complementary uses will support an enlivened film/cinema quarter that provides a range of cultural, leisure and entertainment uses suitable for all ages, including retail and restaurants.

Current Site Status: Under Construction.

EAL11 West Ealing Station Approach (West Ealing)

- 2.43 With a site area of 0.27ha the site is allocated for mixed use development appropriate to the town centre. Currently dominated by small-scale retail units and car parking, the site is underused in relation to its location within the town centre, and appropriate for an

intensified mix of uses. The proximity to a residential area and the arrival of Crossrail make it suitable for the introduction of higher-density mixed use, enhancing the character of the town centre and the main route from the station to the high street area.

Current Site Status: No Change.

EAL12 West Ealing Crossrail Station (West Ealing)

- 2.44 With a site area of 0.11ha, the site is allocated for mixed use development appropriate to the town centre, compatible with the functioning of the Crossrail station. The location of this underused but strategic site in a town centre on premises adjacent to a Crossrail station and nearby designated shopping parades justify a high standard mixed use redevelopment featuring retail uses, which will complement and enhance the Crossrail station planned for opening in 2019, and respect the character of the adjacent residential area.

Current Site Status: No Change.

EAL14 Maitland Yard (West Ealing)

- 2.45 With a site area of 0.84ha, the site is allocated for mixed use development appropriate to the town centre with retention of town centre car parking. The incoherent and low density patchwork of uses on this site does not reflect its prominent town centre location. Redevelopment presents an opportunity to improve the site's legibility, restore a sense of enclosure, a coherent building line and improve the relationship to its surroundings, including to local heritage assets and the adjacent Dean Gardens.

Current Site Status: No Change.

EAL15 66-88 Broadway (West Ealing)

- 2.46 With a site area of 0.27ha, the site is allocated for mixed use development appropriate to the town centre. The site's prime location within West Ealing supports intensification and diversification of uses. The bulky and monotonous built form currently on the site does not reflect the existing variations in the street scene, which would benefit from a more sympathetic development at this location.

Current Site Status: No Change.

EAL16 59-119 Broadway and New Ealing House (West Ealing)

- 2.47 With a site area of 1.39ha, the site is allocated for mixed use development appropriate to the town centre including retail, commercial, residential, and reprovision of community uses and car park. The layout of this prime site at the heart of West Ealing would benefit

from a more legible layout featuring key town centre uses organised around a functional, welcoming and pedestrian friendly network of public spaces.

Current Site Status: Part Implemented: Lidl/Bright House/Holiday Inn Express.

EAL17 Chignell Place (West Ealing)

- 2.48 With a site area of 0.36ha, the site is allocated for mixed use development appropriate to the town centre, including retention of place of worship. The highly accessible and well-connected town centre location supports the intensification of existing uses. Redevelopment further provides an opportunity to improve the design quality of the block and of the adjacent public realm to restore the perimeter block structure.

Current Site Status: No Change.

EAL18 130 -140 Broadway (West Ealing)

- 2.49 With a site area of 0.16ha, the site is allocated for mixed use development appropriate to the town centre, including provision of community uses. The redevelopment of this site offers the opportunity for a high quality development to enhance the street scene and the approach to a key north-south thoroughway in the Green Man Lane estate.

Current Site Status: No Change.

Development Management DPD (December 2013)

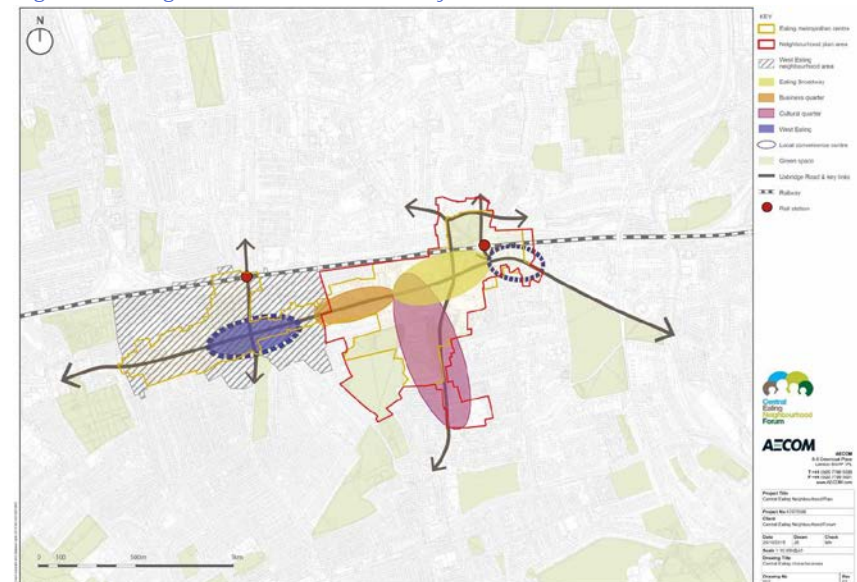
- 2.50 The Development Management DPD (DM DPD) forms part of the wider Local Plan and should be read alongside the Development Strategy 2026 and the Development Sites DPD, both discussed above. Within this framework, the role of the DM DPD is to set out the criteria by which planning applications are assessed.
- 2.51 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.
- 2.52 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.

- 2.53 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.

Emerging Central Ealing Neighbourhood Plan (2016)

- 2.54 A Central Ealing Neighbourhood Plan has been produced by the Central Ealing Neighbourhood Forum (CENF) in consultation with local residents, businesses and organisations in the community. The consultation period for this plan ended in November 2016, and was the subject of an Examination in Public on Thursday 16th February 2017. The Independent Examiners report was published on 20th March 2017, within which he recommended the Neighbourhood Development Plan should proceed to Referendums.
- 2.55 Depending on the outcome of the referendums, the document may be considered a material consideration when determining planning applications in the context of paragraph 216 of the NPPF. This identifies the stage of preparation and number of unresolved objections as two factors influencing the weight that may be given to policies within an emerging plan in decision making.

Figure 3.3: Neighbourhood Plan Boundary



- 2.56 The Neighbourhood Plan has been produced to help guide the development of Ealing town centre during the period 2017 - 2026. The neighbourhood area covered by this plan incorporates Ealing Broadway, the Cultural Quarter and Business Quarter, but excludes West Ealing (Figure 3.3).
- 2.57 The Plan shares the aspirations of the Development Strategy 2026, with a vision that seeks to reaffirm Central Ealing as a “distinctive and welcoming place attracting people from a wide catchment area to visit, work, study, shop and stay”. The Neighbourhood Plan acknowledges the role that retail can play in realising this vision, specifically through encouraging a “renewed shopping experience and a vibrant mix of retail and complementary uses/facilities”. It also identifies other key issues such as protecting the existing townscape, creating a pedestrian-friendly town centre and becoming a regional centre of excellence for culture and education.
- 2.58 The Central Ealing Neighbourhood Plan contains two policies relating to retail use. Policy E1 recommends that all new and proposed retail frontages within the Primary Shopping Area should be designated as ‘primary’ or ‘secondary’. The policy emphasises that the introduction of non-retail units will not be permitted within primary frontages, but may be permitted within those new shopping frontages designated as secondary, provided that:
- an active street level frontage is maintained and the uses are complementary to the functioning of the retail area by providing a direct service to the public and meeting community needs;
 - it will not create an unbroken run of three or more non-shop units;
 - it will not result in an over-concentration of such uses in the frontage.
- 2.59 Policy E1 recognises that to remain competitive, the town centre will need to allow more flexibility in the provision of complementary uses in secondary shopping frontages in accordance with Local Plan Policy 2.15. The supporting text states that primary frontages should continue to concentrate on retail shops, but the overall strategy should be to improve the attraction of both primary and secondary frontages. Complementary uses are defined to include dentists, clinics or health centres, veterinary surgeries, cafes or restaurants, financial services, gyms, and fitness studios, for example. The Independent Examiner recommended that the words ‘primary shopping area’ be deleted from Policy E1 as no evidence was found to support how the boundary was drawn; he concluded that there is no PSA in the development plan.
- 2.60 Policy E2 seeks to encourage a diverse retail offering in Central Ealing, through taking a more restrictive stance to applications for change of use class concerning existing retail premises. This policy calls for increased consideration of the individual character of the town centre. It states that changes will not be permitted where there are existing over-concentrations of certain uses or where the proposed use, including the need for control

of opening hours and types of premises, may erode local amenity. In particular, this policy calls for the need to avoid over-concentration of licensed uses such as gambling and sale of alcohol and recommends refusing all applications for new sui generis class uses for money lenders, amusement arcades and casinos.

Joint Retail Needs Study Update (2010)

- 2.61 This study was jointly commissioned by Ealing, Hounslow, and Hammersmith and Fulham Councils and supervised by a steering group of officers from the three boroughs. The Study, dated May 2010, was undertaken by Roger Tym and Partners (‘The 2010 Study’ from hereon).
- 2.62 In terms of quantitative performance, the report concluded that Ealing Metropolitan Centre was performing strongly (£9,346 per sq m net) (Table 6.2), but noted this was a consequence of pent up demand in the market and a high level of comparison goods expenditure growth which has not been matched by any significant new floorspace being developed during that period (paragraph 6.12). Nothing has occurred in the intervening period to dissipate this demand.
- 2.63 Based on this performance, the report identified a need for up to 50,243 sq m gross of comparison goods floorspace in Ealing Metropolitan Centre to the period 2031 (17,500 sq m gross by 2021) – in a constant market share scenario (Table 6.6). Within a more ‘aspirational’ market share adjustment upwards in Ealing town centre (taking into account commitments and policy aspirations/opportunity), the study identifies a need for 33,248 sq m gross by 2021, growing to c.70,000 sq m gross by 2031 (Table 6.12).
- 2.64 The need for convenience goods floorspace in Ealing town centre is more conservative, equating to just 611 sq m gross by 2021, and growing to 1,827 sq m gross by 2031 (Table 7.4). The need for additional convenience goods floorspace is instead identified for the smaller towns of Acton, Hanwell and Greenford, reflecting their more local shopping function when compared to Ealing Metropolitan Centre.
- 2.65 The conclusions considered that Ealing was fulfilling the role of a Metropolitan Centre, but that the centre should support the introduction of higher order comparison goods floorspace to meet its qualitative deficiencies (including the absence of a department store) and to ensure that the centre responds to competition from Westfield and an extension to Brent Cross.
- 2.66 For Ealing Metropolitan Centre, the recommendations (paragraph 12.27 / v) encourage alternative solutions to the Arcadia Centre extension and/or alternative sites applying flexible design principles in order to deliver new modern units of up to a total of 32,400 sq m gross of comparison floorspace by 2021 or deliver a scheme of sufficient critical mass to ensure a viable development and the qualitative deficiencies of the centre are

addressed. The report recommends an improved and developed retail circuit, ensuring sufficient connectivity and integration between the different elements of the centre.

Ealing Metropolitan Centre Spatial Development Framework (2010)

2.67 This document, prepared by Tibbalds, is a review of the Ealing Town Centre Spatial Development Framework 2008, and provides an updated spatial vision and strategic scenarios for the future of the Ealing Metropolitan Centre. The document is based on the town centre comprising 6 main character areas:

- Eastern Gateway
- Ealing Broadway Retail Core
- Cultural Quarter
- Uxbridge Road Business Quarter
- West Ealing Fringe
- West Ealing Core

2.68 The report set out a number of issues concerning retail to address through the spatial priorities and objectives. These indicate a combination of external pressures and deficiencies regarding Ealing's retail offering as a Metropolitan Centre, in particular:

- The increased 'leakage' of affluent and mobile shoppers and spend to competing and new shopping locations;
- The performance of the town centre when compared to other competing centres;
- The relative under-provision of high quality fashion brands benchmarked against other Metropolitan Centres;
- The lack of a strong department store offer and the lack of specialist retailers in Ealing Broadway;
- The limited supply of large modern shop units in both centres;
- The lack of integration between Ealing Broadway and West Ealing;
- The levels of congestion on the Uxbridge Road; and
- The quality of the existing eating and drinking offer.

2.69 The Spatial Development Strategy also identified a number of key objectives, two of which relate specifically to retail and the town centre:

- Prevent the slow decline of Ealing Town Centre by improving its retail offer, strengthening its core retail role as a Metropolitan Centre, and by providing a stronger complementary retail offer to further support existing retail uses.

- Introduce a vibrant and diverse range of new homes, shops, office, sport and leisure and other public facilities, commensurate with its Metropolitan status. Extend the range and offer of the cultural and leisure uses within the town centre.

2.70 The report concluded by advocating more diverse uses for Ealing Metropolitan Centre in order to prevent its slow decline, but also capitalise on strengths, such as the arrival of Crossrail. Objectives included the introduction of new homes, office, sport and leisure uses; as well as strengthening its existing core retail offer as a Metropolitan Centre and providing more complementary retail uses.

2.71 The report set 5 key spatial priorities for Ealing Metropolitan Town Centre:

1. **Prioritise retail** - The main focus for proposals in the town centre should be for an improved and extended shopping area that is complementary to existing retail.
2. **Protect existing business uses** - The Employment Land Review (2010) makes a clear recommendation that business/ office uses should be consolidated and retained within the business quarter along Uxbridge Road. This leads to a clear preference for the protection of business uses in this part of the town centre and mixed/residential led uses above retail in other areas.
3. **Ensure a mix on the Arcadia site** - The testing of the Arcadia site and the strategic scenarios points to advantages from a mixed use scheme that contains both residential and commercial land uses above retail. This allows a greater degree of flexibility for change over time and also creates valuable employment/office floorspace.
4. **Prioritise the townscape role of new buildings and consistency of scale** - Development should focus on consistent frontages, new urban spaces and strong design character that relates in scale to (but does not copy) the Victorian and spatial heritage of the town centre.
5. **Encourage the growth of the cultural quarter** - Build on the already diverse and creative mix of uses in this part of the town centre to help the night time economy and extend the range of reasons for people to visit Ealing Town Centre.

Summary

- The NPPF 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 LPA's to recognise that town centres are the heart of their communities and to pursue policies which protect their health and vitality.
- Amendments to Permitted Development – introduced in 2015 – enable a change of use from Use Class A1 to A2 and A3 without planning permission. This change enables shop owners to bypass Local Plan frontage policies, thereby undermining the overall town centre strategy and aspirations of the development plan. In particular, it puts at risk the protection of a core comparison goods retail shopping area normally identified as the Primary Shopping Frontage. A critical mass of

clothing/footwear and non-food comparison goods retailing continues to underpin successful town centres, driving visitation rates and footfall and should be protected.

- The Council may wish to consider the introduction of an Article 4 direction preventing permitted development/change of use from A1 to A2/A3 across the Primary Shopping Area, or the Primary Shopping Frontage. This will enable the Council to consider each application on its own merits and protect the core comparison goods shopping function at a period of potential growth and change in Ealing town centre.
- Ealing is one of 13 Metropolitan Centres in London and is identified as a 'medium growth' town centre, having moderate levels of demand and physical capacity to accommodate it. The London Plan promotes town centre diversification through mixed-use town centre redevelopment, and notes that changing shopping habits and the expectations of London's expanding and dense population will give rise to significant demand for modern, more efficient forms of retailing. Local authorities must remain mindful that town centres can be reclassified upwards or downwards in the London-wide retail hierarchy, and strategies should aspire to at least retain a hierarchical position.
- The Development Strategy recognises the strategic location of Ealing Metropolitan Centre within Uxbridge Road/Crossrail growth corridor, and consequent ability to harness for growth and development. The strategy seeks to revitalise Ealing Metropolitan Centre through the provision of up to 50,000 sq m of retail floorspace alongside new homes, offices, sport and leisure and other public facilities. The distinctive character and roles of different parts of the town centre are recognised, highlighting a unique strength, appeal and individuality to build upon.
- The adopted policies map allocates Primary and Secondary Shopping Frontages and a Town Centre Boundary, in accordance with the NPPF, but is not specific in respect of clearly defined Primary Shopping Area. The Development Sites DPD identifies a strong range of central sites to meet the need outlined in the Development Strategy (50,000 sq m), including Dickens Yard, Arcadia, Ealing Broadway Shopping Centre and the Cinema site – key strategic sites with the ability to substantially strengthen the role and function of Ealing town centre.
- Retail and town centre policies within the suite of Local Plan documents – including the Development Management DPD and the emerging Ealing Neighbourhood Plan – and underpinned to a large extent on the ability to enforce Shopping Frontage Use Class thresholds. As noted earlier, these are now vulnerable as a consequence of Permitted Development rights. The Joint Retail Needs Study (2010) identified a strong town centre quantitative performance, and concluded this to be a consequence of pent up demand in the market, high levels of comparison goods expenditure growth, and the absence of new retail floorspace needed to dissipate this demand. No significant development has occurred since this period to alter this position in Ealing.
- In summary, Ealing has a good supply of physical development opportunities, a significant level of comparison goods retail 'need' driven by expenditure growth and a strong level of pent up market demand. The development plan strategy seeks to grow and strengthen the retail offer in order to consolidate Metropolitan Centre status, alongside the diversification of town centre uses, and residential and office markets. The existing character areas provide a strong base for growth and change,

whilst development sites provide opportunities to improve shopper movement through an enhanced 'retail circuit'.

3 NATIONAL TRENDS

- 3.1 In this section we set out a summary of current national trends in respect of the retail and commercial leisure sectors, which can have implications for future growth of centres and demand for new retail floorspace. As part of our assessment, we consider the potential implications of these trends on Ealing Metropolitan Centre.

Economic Recovery?

- 3.2 Analysis published by Experian identified that following several years of subdued performance, including the period of recession; a 'strong economic upswing' subsequently took place, driven by increases in consumer spending and business investment.

- 3.3 In their Retail Planner Briefing Note (November 2016), Experian comment that:

'The UK recovery has continued into 2016. However, there has been some moderation to the pace of upswing since 2014... the recovery has become increasingly reliant on consumer spending as investment has slowed. The near term outlook has become more uncertain following the UK referendum vote in June 2016 in favour of leaving the EU. While the economy has thus far proved resilient, the vote has created major uncertainties, which are expected to take a toll on business sentiment, investment and hiring plans over the coming year'.

- 3.4 In terms of future projections of consumer spending, Experian's outlook is noticeably cautious, stating that:

'We expect consumer spending to begin to weaken over 2017, suffering from higher inflation in the wake of the steep fall in the sterling's exchange rate since the referendum. Wage growth remains modest and is likely to be overtaken by higher inflation, which in turn will constrain spending power'.

- 3.5 Experian conclude that 'the outlook for the next two years for the UK economy has weakened significantly following the Brexit vote'. In the medium term, Experian consider that 'the repercussions of the recession and the implications of the EU referendum vote are set to hamper economic progress for a few years. Much will depend on the outcome of trade negotiations and terminating involvement with the EU. These negotiations could take several years to conclude, and in the meantime, uncertainty over the final deal is expected to constrain business confidence and investment plans'.

- 3.6 There has therefore been a return in confidence to consumer spending in recent years, which offers potential for strongly-performing town centres to capitalise on, although the

most recent guidance from Experian suggests that this recent return to confidence is now being challenged by the uncertainty arising from the referendum vote in June 2016 — as well as other changes in the retail sector which we discuss below.

Internet Growth and 'Click & Collect'

- 3.7 The online shopping population is reaching saturation, and any future growth in the market is likely to come from increased spend driven by new technology, a better 'browsing' experience and improved delivery options. The growth in online sales has previously raised concerns about the continued need for bricks and mortar stores; however trends indicate that online and in-store shopping channels are becoming increasingly blurred and there continues to be an important role for the 'high street' to play.

- 3.8 The 'Click and Collect' market is the largest on-line growth sector in the UK at the current time. Recent data from industry monitor Verdict¹ suggests that click & collect expenditure is expected to grow by 64% between 2016 and 2021, compared to an online growth of 38% over the same period. Verdict's study forecasts that click & collect will grow across all categories, but will particularly be driven by the clothing and footwear sector. The proportion of online orders completed by click & collect has increased from 8.8% in 2011 to 22.5% in 2015², demonstrating steadily-increasing year-on-year growth.

- 3.9 The popularity of click & collect is clearly an important opportunity for town centres, as it can act as a footfall generator in its own right. Verdict identify that 39% of consumers make an additional purchase when collecting an item from a store, up from 29% in 2013. The average amount spent on additional in-store purchases is £13. The majority of national retailers now operate click & collect services. Of the top 10 UK retailers by online revenue in 2015 (see Figure 3.1), many have a trading presence in the Borough's town centres.

- 3.10 Despite being a relatively new concept for the retail sector to embrace, click & collect is therefore affirming that physical stores can continue to have a role in the multichannel shopping environment. However the independent retail sector has generally been

8.8%

Proportion of online orders completed by 'Click & Collect' in 2011

22.5%

Proportion of online orders completed by 'Click & Collect' in 2015

64%

Forecast growth in 'Click & Collect' expenditure between 2016 and 2021

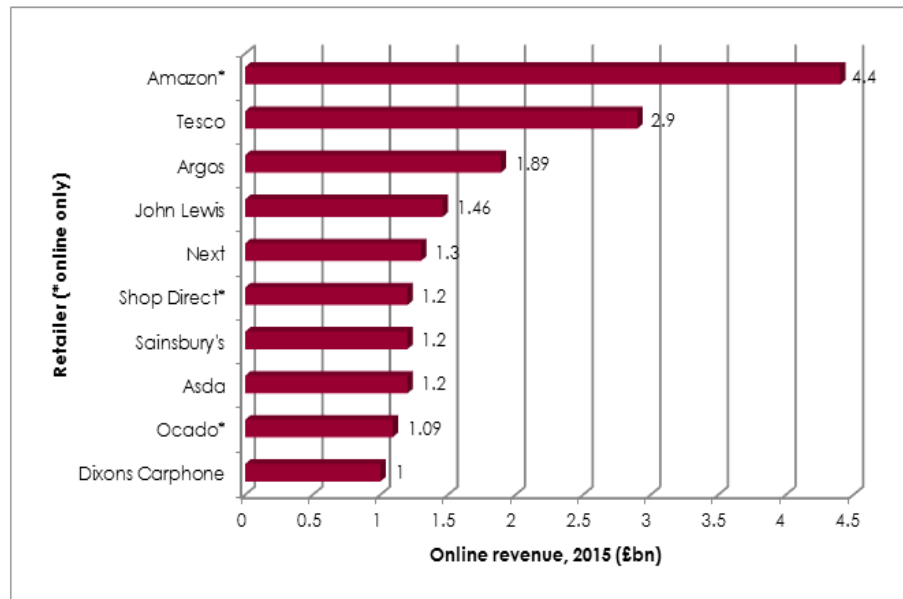
¹ Source: Verdict Retail Channel Series – Click & Collect in the UK 2016

² Source: IMRG Click & Collect Update April 2016, <https://www.imrg.org/imrg-insight/click-collect-update-april-2016/>

slower to embrace the click & collect model and this represents an important opportunity in locations such as Ealing where the independent retail sector is an important contributor to the overall vitality and viability of the town centre – particularly in the cultural quarter.

- 3.11 The click & collect model is not solely benefiting town centres — for example Morrisons is trialling Amazon Lockers in a number of its stores, whilst retailers such as Doddle are opening stores within or close to mainline railway stations, acting as click & collect ‘hubs’ where customers can get orders from a wide variety of retailers sent to and return unwanted goods from. Therefore for town centres to benefit as the ‘preferred locations’ for click & collect services they need to have a strong, complementary offer, to give residents multiple reasons to visit. Increasingly, local shops and newsagents are also offering ‘Click & Collect’ facilities, using networks such as CollectPlus, which partners with brands such as ASOS, John Lewis and House of Fraser to deliver online orders to a network of 6,000 local shops across the country, and convenience stores operated by Nisa, Spar and Costcutter.

Figure 3.1: Top ten UK retailers by online revenue, 2015



Source: Retail Week/Prospect, January 2016. *denotes online only stores. Note: John Lewis also has Click & Collect facilities available via Waitrose stores

Changing Retailer Space Requirements

- 3.12 During the last recession retailers' margins were squeezed, whilst other costs have continued to rise and a raft of multiple and independent retailers have either collapsed or significantly shrunk their store portfolios in recent years. The growth of the internet means that retailers no longer need stores in every town to achieve national coverage, and many are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites. Many operators are continuing to close stores in less-profitable, smaller locations as leases expire.
- 3.13 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. This 'polarisation' of retailing is enabling larger dominant centres to continue to attract key flagship formats. Ealing's proximity to shopping destinations such as central London, Brent Cross and Shepherds Bush/Westfield means this trend is particularly applicable.
- 3.14 The consequence which often arises is that smaller and medium-sized centres become home to more, value-orientated retailers – Poundland, Wilko, Primark and so on – who are more reluctant to pay the rental costs associated with higher-order centres, and, much in the same way that Woolworths previously did, are developing a comprehensive network of coverage in smaller towns, often by being able to acquire prime retail sites at relatively competitive rates. The retail offer in Ealing has been reasonably resilient to this trend, and whilst offering a number of value retailers, the centre has retained a good mix of mid-range operators reflecting its Metropolitan Centre status.

The Role of the Town Centre

- 3.15 The town centre has been the main shopping channel for centuries, but in the face of new forms of e-tailing (i.e. online shopping) and m-tailing (shopping through mobile phones, tablets and so on), many centres will need to continue to adapt in order to remain viable shopping destinations. Across the UK, footfall decreased in High Street locations during the first quarter of 2016³, emphasising the need for centres to offer a broad range of uses to assist in driving footfall. Many centres are increasingly positioning themselves as being locations for leisure and social activities alongside traditional retailing, with more bars, restaurants, food outlets and community spaces. The Local Plan

³ Source: IPSOS Retail Traffic Index

and London Plan have picked up this trend with many policies protecting the core retail function, but promoting town centre diversification (see Section 2).

- 3.16 Centres which offer a unique/specialist retail offer which cannot be matched online are also likely to continue to perform strongly. Ealing is fortunate to have a strong and attractive cultural quarter/character area offering a good quality range of independent and niche eating/drinking operators. A town centre strategy should seek to build upon this strong physical base, and Ealing must continue to provide an attractive shopping, leisure and evening economy experience which the internet is unable to match.

The Convenience Sector

- 3.17 One of the biggest changes which has taken place since the Council's previous evidence base study is a fundamental change in food shopping patterns. Industry data providers Mintel have recently described the changes in convenience goods shopping as 'the trends of the whole of the post-war era [being] reversed'. Key notable changes include:

- Superstores are losing market share;
- The convenience [small -format] stores of the market leaders and the Co-op are gaining share;
- Aldi and Lidl are achieving double-digit growth;
- Other convenience stores are losing share;
- Certain retailers classified as non-food retailers, notably M&S and the non-food discounters such as Home Bargains and Poundland are increasing their share of food spending; and
- Online demand is growing.

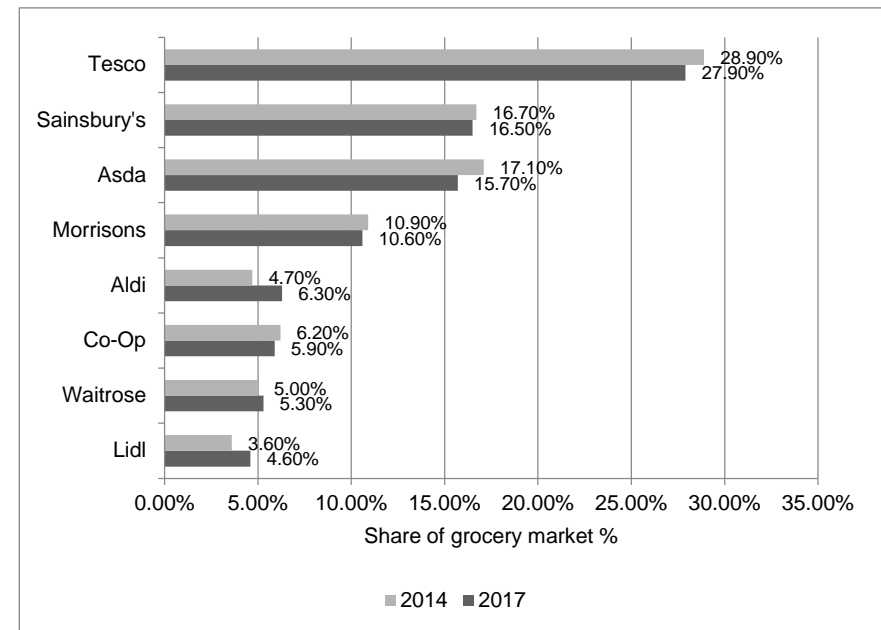
- 3.18 Mintel consider there to be two reasons behind these trends, which they consider started in 2012, with the first of these trends of particular relevance given the location and composition of Ealing. Firstly, Mintel consider that 'there has been a shift of population back into inner cities and much of it into rented accommodation. These people are much more likely to shop on an 'as needs' basis and to eat out; so the majority of their food retail demand goes to smaller, local convenience stores. This is also apparent in the growth of craft bakers and the development of specialist delis'. Secondly, Mintel note that 'Aldi and Lidl have transformed their offer, expanding their ranges, strengthening their fresh foods and adding premium lines'. We think this has led to a step change in their performance and that we are approaching a time when growth will be primarily driven by store openings'.

- 3.19 The increased popularity of 'as needs' shopping is behind the growth of small-format 'convenience' stores such as Sainsbury's Local, Tesco Express, Co-Operative, Marks &

Spencer Simply Food and Little Waitrose, with this trend particularly apparent in urban areas. The main foodstores (i.e. the 'big four' – Asda, Morrisons, Sainsbury's and Tesco) have responded to these changes by reigning in substantial expansion of their estates, particularly in terms of larger-format superstores. Both Tesco and Morrisons announced a closure programme of underperforming stores in 2015, and further store closures were announced by Morrisons in 2016. Ealing town centre has been resilient to such cut-backs, and has instead benefitted recently from a new Morrisons foodstore as part of the Arcadia Centre redevelopment.

- 3.20 Both Aldi and Lidl have gained market share for a number of consecutive years, largely at the expense of the 'big four', and both Aldi and Lidl are pursuing ambitious development programmes of opening new stores as well as refurbishing older stores. Mintel consider that, aside from growth from new store openings, the increased market share of these operators may now begin to plateau. The market share of Aldi and Lidl combined is now over 10% of the total grocery market - but as can be seen from Figure 3.2 neither operator is yet challenging the dominance of the 'big four' retailers of Tesco, Sainsbury's, Asda and Morrisons

Figure 3.2: Market share of main foodstore operators, 2014 and 2017



Source: Kantar Worldpanel, March 2017

- 3.21 Notwithstanding the trends discussed above, over 50% of food shopping is still undertaken in larger-format supermarkets — and if shopping in Aldi and Lidl stores is included this figure rises to over two-thirds of all food shopping. There is still therefore clearly a role for the larger-format store to play in convenience goods shopping. Operators with 'hyper-market' format stores (over 60,000 sq ft net) are seeking to introduce concessions or sub-lets to make better use of excess space. For example, some branches of Sainsbury's are trialling Argos concessions, and branches of Tesco Extra include either concessions from other Tesco-owned brands, or other fashion retailers.

Commercial Leisure

- 3.22 As the nature of retail and high-street shopping continues to change over time, the commercial leisure sector is becoming an increasingly important contributor to the vitality and viability of town centres. Leisure time is a precious commodity to consumers and in order to maximise free time, research suggests that town centre visitors often combine leisure activities as part of an overall going out experience.
- 3.23 There is extensive evidence that demonstrates the importance which café culture can make to wider vitality and viability of town centres. Beyond Retail's 'Redefining the Shape and Purpose of Town Centres' (November 2013) concluded that:

"town centres need to develop alternative functions to draw people back and support its retail base. Town centres will remain important as a focus for social and commercial purposes however must seek to provide more than a neighbourhood shopping role. Expanding their other roles will be an important response to the polarisation of shopping and in creating a vibrant, social, commercial and cultural hub' (our emphasis)."

- 3.24 The contribution which commercial leisure can make to town centres is also identified in the GLA's 'Accommodating Growth in Town Centres' study (2013). The report states that 'most commentators predict that commercial leisure, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace'. A shift towards a broader mix in centres 'can have wider positive implications on the performance of the town centres in question: residents and visitors spend longer in the centre, undertake 'linked trips' between retail, leisure and other uses, and increase their dwell-time in a centre. The development of a strong commercial leisure offer can also help to increase footfall outside of retail hours, for example in early evenings'.
- 3.25 Drawing on the findings of the GLA's own monitoring of its town centres, the study notes that 'The recently published GLA Town Centre Health Checks report confirms the increasing trend for town centres to look towards the commercial leisure sector to help diversify their retail offer'. The report found that there is almost 2.9million sq m of leisure floorspace in London's town centres, an increase in 230,000 sq m (+9%) since 2007. The

report notes that growth was particularly strong in restaurants and cafes, with a 21% increase in outlets between 2007 and 2013. This trend has continued to the present day.



- 3.26 The pub industry suffered during the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. This decline continues today, at a rate of approximately 30 pub closures per week across the country. Many pubs have in recent years been converted to small-format convenience stores. Additional factors such as competition from supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Similar to the foodstores, however, value led brands such as JD Wetherspoon have achieved sales growth in recent years and continue to expand. In London, the popularity of specialist pubs offering craft beers and local ales also remains strong, and this is a trend which is now becoming popular in other urban areas.
- 3.27 The health and fitness sector continues to perform strongly as the social trend involving the maintenance of personal health and fitness shows no sign of abating. The health and fitness market is currently being expanded through investment by value and budget operators such as Easy Gym, Gymbox and Pure Gym. This new breed of venues aims to appeal to a wider market with flexible, low cost monthly or 'pay as you go' subscriptions. These facilities are usually located in high-footfall and edge of centre locations, often as part of a wider leisure offer.

- 3.28 The cinema market is continuing to perform strongly, and in recent years has overtaken foodstores as a typical 'anchor' to new town centre development schemes. Both major cinema operators (e.g. Cineworld, Odeon) and smaller/independent operators (e.g. Curzon, Everyman) continue to open new developments. The absence of a cinema in Ealing town centre in recent years is being addressed through the development of the 'Filmworks' site opposite the Town Hall. This will contribute significantly to the overall vitality and viability of the town centre, and assist in pedestrian circulation towards the western end of New Broadway.

Summary

- Whilst 'traditional' high streets continue to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years and continued changes in consumer shopping behaviour, town centres have remained relatively resilient in more recent years. The growth in online shopping historically focused on negativity for the high street, but in the context of 'click and collect' there are clear opportunities for town centres to maximise linked trip opportunities as retailers move towards a seamless transition between store-based and virtual shopping experiences. For Ealing, we consider the implications of such trends in later sections.
- The main foodstore operators have implemented major cut-backs in recent years, particularly in the 'large-format' stores, with some even closing down. Ealing town centre has been resilient to such cut-backs, and the convenience sector has strengthened through the new Morrisons store as part of the Arcadia Centre redevelopment. The changes observed in convenience goods shopping patterns also present an opportunity for the high street to benefit, as smaller format stores now preferred by many operators can more readily be accommodated in town centre locations.
- Town centre strategies which support the continued evolution of the high street are considered ever more vital. In larger centres like Ealing, this should be underpinned by a critical mass of core, high quality shopping, alongside an improved mix of non-retail leisure services to drive increased dwell time and spend. Improvements to commercial leisure provision (both in terms of daytime uses such as cafes and evening uses such as cinemas, bars and restaurants) is a major opportunity which town centres should continue to embrace, increasing the 'trading hours' of the town centre beyond those typically associated with retailers.

4 SUB REGIONAL CONTEXT

- 4.1 The May 2010 Joint Retail Needs Study Update examined the performance of Ealing Metropolitan Centre in the context of the retail network of centres across the wider sub-region. The analysis focused on the shopping catchments, trade flows, and the implications of permitted schemes in identified 'competing' centres. A telephone survey of 3,000 households across 30 survey zones was undertaken (2009) which informed the findings.
- 4.2 The Household Telephone Survey identified that Ealing Metropolitan Centre was retaining 29.5% of Zone 4-10 comparison goods expenditure (broadly equivalent to the borough boundary). Leakage of comparison goods trade from the borough was travelling to Central London/West End (6.6%), Brent Cross (5.2%), Shepherds Bush/Westfield (4.1%), Hounslow (3.1%) and Uxbridge (2.9%). Shepherds Bush/Westfield was, at the time of the 2010 report, a 'new' competitor as a consequence of the opening of Westfield shopping centre.
- 4.3 The report also makes comparisons with the trading position in 2006, the time of the previous Retail Needs Assessment, and prior to the opening of Westfield Shepherds Bush. This highlights that Westfield has had the greatest impact on Ealing town centre (-11%) when compared against the higher order centres within the joint authority boroughs, including Hammersmith and Hounslow. The figures confirm that the turnover of Ealing Metropolitan Centre declined between 2006 and 2009 by £37.2m.
- 4.4 It is also apparent that Westfield has had an impact on comparison goods trade leakage to higher order destinations outside the joint authority area. People living within the West London authorities were now choosing to visit Westfield, rather than the West End, Kingston, Richmond, Uxbridge and Harrow, for example. Trade travelling to Kingston for example has fallen by 23.8%, Uxbridge 21.2%, Harrow 53.3%, and Richmond 18.9%. Whilst Westfield has had an impact on Ealing Metropolitan Centre of £37.2m, trade travelling from the West London authorities to Kingston and Harrow has fallen by £82.9m and £55.3m respectively.
- 4.5 Borough-wide convenience goods trade retention is stronger, equating to 60.8% (2009). At the time of the study, the Tesco in the old Hoover building and Waitrose in West Ealing attracted the greatest levels of convenience goods trade. Only the Tesco Metro in Ealing registered in the survey as a convenience goods destination, whilst Sainsbury's and Waitrose in West Ealing achieved reasonably strong market shares, identifying them as two of the most popular stores in Ealing borough.

- 4.6 In Section 5 of the 2010 report, the future impact of identified major retail developments was assessed, including the direct impacts on Ealing Metropolitan Centre. The exercise focused on comparison goods led schemes due to their wider sphere of influence on shopping patterns, and included Dickens Yard in Ealing, the Central Square and 'Quintain Sites' in Wembley, and the Brent Cross extension. In Ealing, Dickens Yard is under construction, and will provide between c.4,500-9,000 sq m of A1 shopping floorspace. On 15th March 2017, Jigsaw was confirmed as the first operator to occupy the scheme, scheduled to open for trading in 2018. The full Dickens Yard development is expected to be completed in 2019.

Dickens Yard, Ealing



- 4.7 The 2010 report concluded that despite the initial uplift in market share for Ealing following the Dickens Yard scheme, the centre will suffer a slight decline in turnover by 2016 due to competition from other schemes in Wembley and Brent Cross. The outputs from Section 5 confirm that the development of the Dickens Yard scheme is necessary to – at best – maintain Ealing's 2009 market share in 2016; this is in the context that Ealing has already lost market share due to the 'Westfield effect'. In summary, the implementation of Dickens Yard will not alone be sufficient to enhance market share given the extent of investment in the sub-regional network of centres/destinations.

- 4.8 We provide an update to committed and pipeline development in the Sub-Regional competing centres below in order to gauge the extent of current and future threats to the health of Ealing Metropolitan Centre.

Pipeline Development/Future Challenges

- 4.9 We set out here an update in respect of the key competing centres, their aspirations for future change and details of recent and future development that might compete with Ealing for market share. Based on previous analysis and our in-depth understanding of the catchment area, we focus our analysis on Brent Cross, Shepherds Bush/Westfield, Hounslow, Uxbridge and Wembley.

Brent Cross

- 4.10 In 2010, the Brent Cross Cricklewood Development Partners secured a planning permission for a £4bn masterplan to create a new town centre including 7,500 homes, 27,000 jobs, three re-built schools, new parks and community facilities, an additional train station on the Midland Mainline, and major road and public transport improvements. In October 2013 the Development Partners submitted a Section 73 application to make changes to conditions attached to the 2010 Permission. A new permission was granted in July 2014, and the Reserved Matters applications (2015) for detailed works of the first phase of the Brent Cross Cricklewood regeneration have now been approved. The permissions remain unimplemented.

Brent Cross Extension/Refurbishment



Shepherds Bush/Westfield

- 4.11 Westfield London currently houses over 360 luxury, premium and high street retailers from more than 15 different countries. It is also home to The Village, a luxury mall designed specifically to cater for the growing consumer demand for luxury products. As well as providing a world-leading shopping experience, Westfield London is a leisure and social destination for Londoners and tourists alike with a 17 screen state-of-the-art cinema, the UK's first Kidzania, the Atrium events space, a flagship gym and an array of restaurants and bars. Westfield London also plays host to the latest music artists through the Westfield Presents platform, providing spaces and technical support for artists to perform in the centre.

Westfield Shepherds Bush Extension



- 4.12 Westfield London is embarking upon a £1bn plus project that will add 740,000 sq ft of high-quality retail anchored by a 230,000 sq ft John Lewis Department store, residential and mixed-use space to create an appealing townscape with a vibrant pedestrian quarter around high quality public realm. New homes, shops and businesses will add to the mix and vitality in the White City Opportunity Area with other landowner investors and benefit the local community that live and work there. The scheme has been granted planning permission (2015/02565/VAR).

Hounslow

- 4.13 Hounslow Council appointed development partners Barratt London and Wilson Bowden to deliver the 'vision to transform' Hounslow Town Centre, and in February 2016 planning permission was granted for the 'Hounslow High Street Quarter':

demolition of commercial and residential properties, site clearance and redevelopment comprising - The construction of a mixed-use development comprising five blocks with 527 residential units (311 private units, 108 shared ownership units and 108 affordable rent units), a multiscreen cinema (Use Class D2) of 5,267 sq m (GEA), 9,830 sq m (GEA) of retail, restaurant and cafe uses (Use Classes A1, A2, A3, A4 and A5), infrastructure including 513 parking spaces, 686 cycle parking spaces, service areas, public realm incorporating pedestrian/cycle circulation areas with associated hard and soft landscaping and private amenity spaces. [App Ref: P/2015/0913]

Hounslow High Street Quarter



- 4.14 The site comprises an area of 2.48 hectares within Hounslow Town Centre. A new pedestrian piazza at the centre of the scheme is intended to form the centrepiece of the proposals, complementing the existing town centre open spaces, including the street market and events space. The scheme will include a leisure hub, introducing a new multiscreen cinema into the area, and around 9,830 sq m (GEA) of retail, restaurant and café floorspace, with tables lining the pavements and an area dedicated to family sports and games orientated activities.

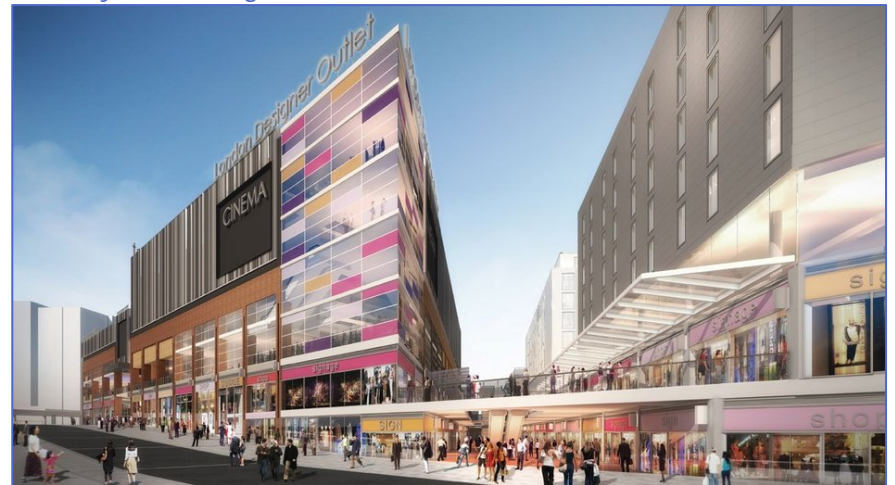
Uxbridge

- 4.15 Uxbridge is identified as a Metropolitan Centre in the London Borough of Hillingdon Local Plan (2012). The centre performs a strong comparison retail function and offers a good convenience shopping offer. The primary retail area includes two shopping centres — Pavilions (which opened in 1973) and Intu Uxbridge (which opened in 2001), plus a traditional High Street. The centre has a good, if fairly typical, range of retailers trading including Next, Marks & Spencer, Debenhams, H&M, Topshop/Topman and so on. There is an Odeon cinema located within the Intu Uxbridge centre.
- 4.16 A new community is being planned on the edge of Uxbridge town centre; 'St. Andrew's Park' development will include up to 1,340 new homes, a new primary school, large public park, offices, shops, restaurants, theatre, hotel, museum and care home.

Wembley

- 4.17 Wembley Central (in Wembley town centre, adjoining Wembley Central train station) is now open for trading with a small range of operators including Argos, TK Maxx, Bright House, Sports Direct and EE. The Wembley Park London Designer Outlet Centre has also opened since the 2010 Study. The 'destination', located adjacent to Wembley Stadium and close to Wembley Station train station, has over 50 outlets, a Cineworld Cinema and a large range of eating/drinking operators. Retailers include North Face, Superdry, Phase Eight, Bench, Clarks, Gap, Fiorelli, H&M, Jack Wills, Joy, M&S Outlet, Next Outlet, Nike, Lee and Levis.

Wembley London Designer Outlet



- 4.18 The boundary of Wembley town centre defined in the Core Strategy (2010) takes account of, and includes, land where consents have been granted for retail expansion. This includes the London Designer Outlet now open for trading. However, since the Core Strategy was adopted in 2010, consent has been granted for a further 30,000 sq m of new retail/town centre floorspace on land at Engineers Way (Planning Ref: 10/3032); other uses include 25,000 sq m business B1, 5,000-20,000 sq m hotel C1, up to 3,000 sq m community uses, up to 5,000 sq m leisure and entertainment uses, up to 25,000 sq m student accommodation, and up to 1,300 residential units.
- 4.19 The Wembley Area Action Plan (January 2015) confirms that the scale of this proposed new development is in keeping with a major town centre and it is concluded to be logical, therefore, to extend Wembley town centre to include this area.

Summary

- Westfield, Shepherd's Bush has had an 11% impact on Ealing Metropolitan Town Centre, equating to a trade diversion in the region of £37m; a greater impact than any other centre in the three West London Authorities. Kingston and Harrow have both experienced a higher trade diversion, with £82.9m and £55.3m (respectively) of West London Authority expenditure transferring to Westfield, Shepherds Bush. Ealing has, in comparison, been relatively resilient.
- Dickens Yard in Ealing is the most advanced development site in Ealing town centre; it is under construction and set to introduce a number of additional retail operators to the high street mix. The previous Retail Study concluded that the Dickens Yard scheme will – at best – maintain Ealing's 2009 market share in the context of competing schemes being brought forward at Brent Cross and Wembley. The implementation of Dickens Yard will not alone be sufficient to enhance market share given the extent of investment in the sub-regional network of centres/destinations.
- Since the previous Retail Study, further investment is emerging in the network of competing centres. Whilst Brent Cross remains unimplemented it continues to move forwards as a scheme; both Wembley sites have been implemented and a further major retail scheme has recently been permitted; an extension to Westfield, including a John Lewis anchor department store, has been granted planning permission; Hounslow High Street quarter has been granted planning permission; and Uxbridge will benefit from a new edge of centre community with retail, cultural and community facilities.
- In accordance with the Development Strategy 2026, Ealing Metropolitan Centre will need to bring forward investment over and above Dickens Yard and the cinema site to retain and enhance market share, consolidating its Metropolitan Centre position within the network of sub-regional competing centres. In particular, modern retail accommodation – like that being brought forward at Brent Cross, Westfield, Wembley and Hounslow – is needed to attract multiple high street operators currently absent from the town centre.

5 EALING TOWN CENTRE

- 5.1 Ealing Metropolitan Centre is one of 13 Metropolitan Centres in London and is the principal focus for shopping in the Borough of Ealing. It consists of Ealing Broadway at the eastern end of the Uxbridge Road and West Ealing towards the western end. These operate as two distinct shopping areas, separated by a range of other key town centre uses along Uxbridge Road. It benefits from a number of advantages related to its geographic location, in particular its proximity to Central London and Heathrow; its accessibility; the quality of its built environment; the proximity of a large and diverse population and the availability of land for development.

Diversity of Uses

- 5.2 In this section, the diversity of uses within Ealing Broadway and West Ealing is identified in order to separate and identify their differentiated composition and role in advance of considering Ealing Metropolitan Centre as a whole. Ealing Broadway is the main retail core of the town centre containing the larger floorplate retail uses and shopping centres; whilst West Ealing is the secondary retail area within the town centre and almost comprises a local town centre in its own right.

Ealing Broadway

- 5.3 Based on the latest survey undertaken by Experian Goad (July 2016), Ealing Broadway currently comprises 76,775 sq m gross retail and service floorspace across 344 units of which 29 were identified as being vacant. Table 5.1 and 5.2 below set out the diversity of retail and service units in Ealing town centre compared to the national average in respect of town centre composition.

Table 5.1: Ealing Broadway Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	30	8.72	8.69	0.03
Comparison	98	28.49	31.65	-3.16
Leisure Service	100	29.07	23.54	5.53
Retail Service	46	13.37	14.10	-0.73
Financial and Business Service	41	11.92	10.54	1.38
Vacant	29	8.43	11.19	-2.76
Misc	0	0	0.12	-0.12
Total	344	100	100	-

Table 5.2: Ealing Broadway Composition of Uses (Floorspace sq m gross)

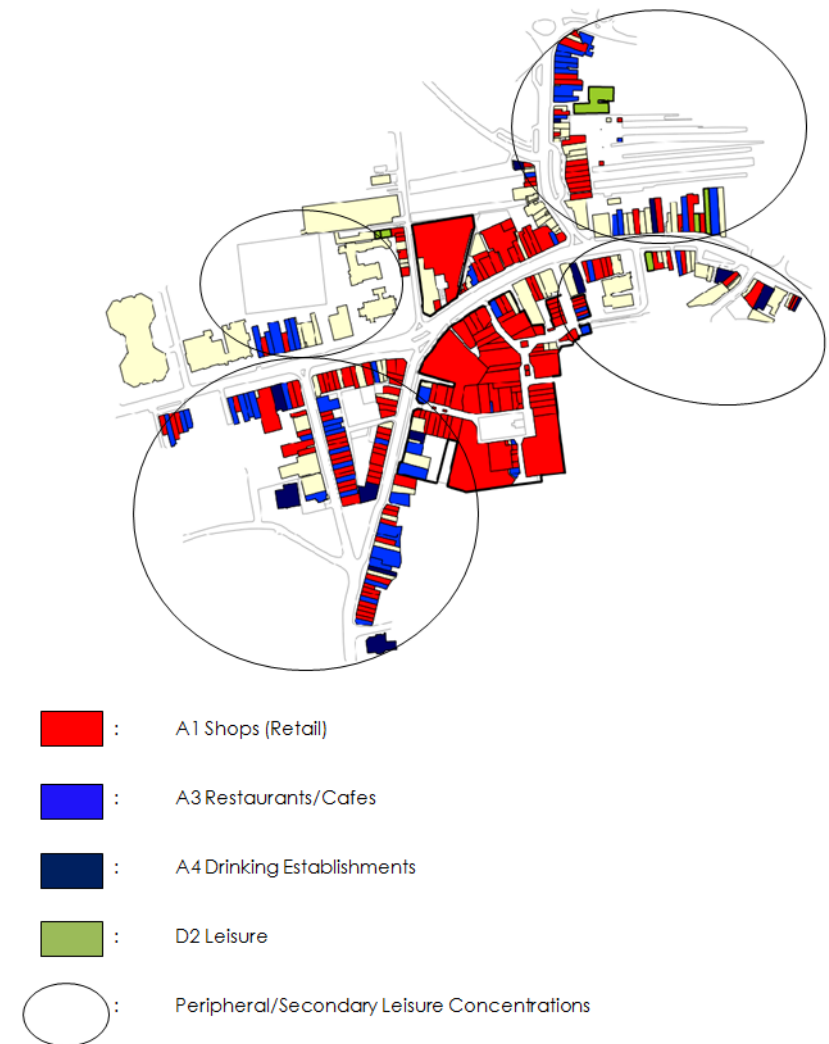
	Floorspace	% of Total	UK Average (%)	Variance
Convenience	9,467	12.33	15.18	-2.85
Comparison	31,103	40.51	35.64	4.87
Leisure Service	19,593	25.52	24.62	0.9
Retail Service	5,110	6.66	6.74	-0.08
Financial and Business Service	7,897	10.29	7.90	2.39
Vacant	3,605	4.70	9.19	-4.49
Misc	0	0	0.11	-0.11
Total	76,775	100	100	-

- 5.4 Convenience goods provision in Ealing Broadway is broadly in line with the UK national average, accounting for 12.3% of floorspace and 8.7% of total units. A number of stores remain represented from the 2010 Retail Study including Tesco Express on Haven Green Parade, the Sainsbury's Local on The Broadway and M&S Food in the Ealing Broadway Centre. There has been some recent improvement to the food offer in this part of the town centre following the opening of a good sized Tesco Metro in the Ealing Broadway Centre and a Morrison's foodstore on The Broadway.
- 5.5 During 2014, the Arcadia Centre on The Broadway was redeveloped (Ref: P/2013/1127). The scheme demolished 25 previously smaller sized units and replaced them with 3 larger, modern configured units now occupied by McDonalds, TK Maxx and Morrisons. TK Maxx occupies the entire first floor, whilst Morrisons occupies most of the ground floor alongside McDonalds. Qualitatively, and alongside the smaller, independent convenience stores, Ealing Broadway has a good mix, range and quality of foodstore.
- 5.6 The comparison goods (non-food) offer is marginally below the UK national average in terms of number of units; 28.5% compared to 31.7% (Table 5.1). You would expect a higher order Metropolitan Centre to be performing at a stronger level than identified by Experian in July 2016, albeit the proportion of floorspace is higher. The Experian Goad Category Report (2016) provides a finer grained break down of the sub-categories of comparison goods which highlights the below average number of children's and infants wear, footwear and menswear, and a proportion of ladies wear and accessories that is only just above the national average. There are no department stores, but three variety stores are identified including Marks & Spencer, Argos and TK Maxx.
- 5.7 The retail mix is generally mid-range, with national multiple clothing and footwear retailers largely confined to Marks & Spencer, H&M, New Look, Clarks, Bravissimo, JD Sports, Monsoon/Accessorize, Primark, River Island, Next, Clark and Office. Other national

multiples include Argos, Boots, Currys & PC World, Superdrug, Waterstones, Bang & Olufsen, Morrisons, Tesco Metro, WH Smith, Holland and Barratt, Ryman Stationer and Sainsbury's.

- 5.8 Many of these operators are strong attractors with a loyal customer base, and names such as Primark, H&M and Marks & Spencer, are amongst the strongest footfall drivers in today's market. Nevertheless, the overall quality, range and breadth is limited compared to town centres at the same level in the London wide retail hierarchy (i.e. Metropolitan Centres). Operators you might expect in centres like Ealing include East, Jigsaw, French Connection, Cath Kidston, White Stuff, Fat Face, Jo Jo Maman Bebe, Phase Eight, Gerry Weber, Space NK, Russell & Bromley, Warehouse, Mint Velvet, Miss Selfridge, Top Shop and Hobbs, for example.
- 5.9 We note that Jigsaw has recently been confirmed to occupy new space in Dickens Yard, reinforcing the resilience of Ealing town centre as a destination in close proximity to Westfield, and also the market demand from operators if the appropriate unit space is provided.
- 5.10 100 outlets are in occupation by leisure services, such as cafes, bars, public houses, cinemas and restaurants. This is equivalent to 29% of all units in the centre — considerably above the UK average of 23.5%. This confirms the positive contribution which leisure services are already making to the vitality and viability of Ealing metropolitan town centre. Indeed, analysis of sub-category representation within the leisure services category shows that:
- Café uses in the centre account for 6.2% of all units, above the UK average of 4.4%;
 - Restaurant uses in the centre account for 10.4% of all units, over double the UK average of 4.6%;
 - Bars and wine bars in the centre account for 2.7% of all units, above the UK average of 1.6%.
- 5.11 The presence of Class A3, A4 and D2 uses in Ealing metropolitan town centre is mapped on Figure 5.1. Figure 5.1 visually shows how significant a contribution that leisure uses are already making to the wider offer of Ealing metropolitan town centre, and are predominantly located in 'secondary' shopping areas including Bond Street/New Broadway; High Street; Haven Green; and The Mall. This highlights the effectiveness of development plan frontage policies, safeguarding the Primary Shopping Frontage for A1 Use Classes, but 'flags up' the risk of permitted development rights bypassing local plan policies moving forwards (see discussion in Section 2).
- 5.12 The clear qualitative gap in the offer is the absence of a cinema; however this shortfall will be addressed in the near future following completion of the Filmworks development (St George) opposite the town hall.

Figure 5.1 Ealing Broadway Use Classes Location Map



Ealing Broadway Use Classes Location Map

- 5.13 In the Financial & Business Services category, 37 units are occupied by banks, building societies, estate agents and so on. This is equivalent to 12.0% of all units in the centre, in line with the UK average of 10.5%, and confirming no over-concentration of this use type. Within this category, estate agents and banks dominate the mix, both being noticeably above national average.

West Ealing

- 5.14 Based on the latest survey undertaken by Experian Goad (July 2016), West Ealing currently comprises 52,563 sq m gross retail and service floorspace across 247 units of which 24 were identified as being vacant. Table 5.3 and 5.4 below set out the diversity of retail and service units in West Ealing compared to the national average in respect of town centre composition.

Table 5.3: West Ealing Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	29	11.7	8.69	3.05
Comparison	55	22.3	31.65	-9.38
Leisure Service	67	27.1	23.54	3.59
Retail Service	43	17.4	14.10	3.31
Financial and Business Service	25	10.1	10.54	-0.42
Vacant	24	9.7	11.19	-1.47
Misc	4	1.6	0.12	1.5
Total	247	100	100	-

- 5.15 The outputs from the survey highlight the different role that West Ealing performs compared to Ealing Broadway. In particular, the centre has an above average provision of convenience, leisure service and retail service operators, and a below average provision of comparison goods operators. The comparison offer is particularly weak (22.3% of units compared to 31.7% national average), but this reflects the centres more
- 5.16 Compared to Ealing Broadway, the mix of national multiple retailers is substantially more limited and includes Waitrose, Tesco Express, Warren Evans furniture, Majestic Wine, Iceland, Poundland, Holland and Barratt, Boot, Lidl, Wilko, Superdrug, Poundworld and Sainsbury's. Bhs closed down, but West Ealing has retained 1,500 sq m of A1 retail space at ground floor level within this unit. This is consistent the more secondary nature of retailing in West Ealing, and we would not expect this stretch of frontage to attract a much improved mid-range mix at this point in time. The Ealing Farmers Market was

established in September 2001 and trades every Saturday morning between 9am and 1pm on Leeland Road, offering predominantly food products.

Table 5.4: West Ealing Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	12,987	24.71	15.18	9.53
Comparison	16,267	30.95	35.64	-4.69
Leisure Service	11,269	21.44	24.62	-3.18
Retail Service	4,933	9.38	6.74	2.64
Financial and Business Service	3,902	7.42	7.90	-0.48
Vacant	2,815	5.36	9.19	-3.83
Misc	390	0.74	0.11	0.63
Total	52,563	100	100	-

Ealing Metropolitan Centre (Ealing Broadway and West Ealing Combined)

- 5.17 Ealing Broadway and West Ealing combined comprise 129,308 sq m gross retail and service floorspace across 591 units of which 53 were identified as being vacant. Table 5.5 and 5.6 below set out the diversity of retail and service units in Ealing Metropolitan Centre compared to the national average in respect of town centre composition. Overall, the vacancy rate is below average, and there is a strong provision of leisure services, but a below average number of comparison goods operators.

Table 5.5: Ealing Metropolitan Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	59	9.98	8.69	1.29
Comparison	153	25.89	31.65	-5.76
Leisure Service	167	28.26	23.54	4.72
Retail Service	89	15.06	14.10	0.96
Financial and Business Service	66	11.17	10.54	0.63
Vacant	53	8.97	11.19	-2.22
Misc	4	0.68	0.12	0.56
Total	591	100	100	-

Table 5.6: Ealing Metropolitan Centre Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	22,454	17.36	15.18	2.18
Comparison	47,370	36.63	35.64	0.99
Leisure Service	30,832	23.86	24.62	-0.76
Retail Service	10,043	7.76	6.74	1.02
Financial and Business Service	11,799	9.12	7.90	1.22
Vacant	6,420	4.96	9.19	-4.23
Misc	390	0.30	0.11	0.19
Total	129,308	100	100	-

Character Areas

5.18 As part of the 2010 Spatial Development Framework a number of character areas were identified throughout Ealing Metropolitan Centre. These remain unchanged and provide a useful contextual description of the layout and composition of the centre, where the key uses are concentrated, and the strength in physical layout when considering 'character areas' and retail circuit:

- **Eastern Gateway** - has an increasing sense of scale and active uses on approach to the town centre from the east and Ealing Common. Mostly smaller retail uses and cafes closely located with residential uses. Policy recognises an opportunity to create a much improved physical 'gateway' to Ealing Metropolitan Centre from the east.
- **Ealing Broadway** - the main retail core of the town centre containing the larger floorplate retail uses and shopping centres. Within Ealing Broadway, the key 'anchor' stores can be considered to be Primark and H&M in the Ealing Broadway Centre, and Marks & Spencer and TK Maxx on The Broadway. The Morrisons and Tesco Metro supermarkets can also be considered to play an 'anchor' role to the retail offer. Other key stores present in the centre include fashion operators such as Next, River Island, H&M and New Look, alongside other operators such as Tiger, Waterstones, Boots, WH Smith and Currys/PC World.

On the commercial leisure side, notable operators present in the centre include Cote, Carluccio's, Wagamama, Wasabi and Turtle Bay restaurants, and coffee shops such as Starbucks, Caffe Nero and Costa. Much of the commercial leisure offer is concentrated around the southern end of the town centre, along High Street and as part of the Ealing Broadway Shopping Centre. Further representation of café/restaurant operators is also apparent on the northern side of New Broadway, where Franco Manca and Pho are recent openings, alongside a large branch of Bill's Restaurant. Shoppers with mobility problems, including the elderly, have use of

scooters or wheelchairs as part of the ShopMobility scheme that has relocated to the Ealing Broadway Shopping Centre.

Cultural Quarter - to the west and south of the main retail core is a range and focus of cultural uses. This includes the cinema site (currently under construction), Questors theatre, Pitshanger Manor Gallery and cultural centre and a range of restaurants and cafes that give this area a broader usage and evening economy. The strong independent café and restaurant sector present in The Green / Bond Street area provide further diversity to the offer of the centre and promoting a vibrant centre both during and outside retail trading hours. Buildings in this area are generally consistent in scale and form clear street frontages.

- **Business Quarter** - to the west of the main retail core. It is broadly consistent in its character of pavilion office buildings sitting in irregular rows along either side of the Uxbridge Road. A key characteristic are gaps between the buildings and the taller scale and strong entrances of each building.
- **West Ealing Fringe** - is the start of West Ealing to the west of the Business Quarter and at the very western end of the town centre. This area contains a broader, generally smaller scale of retail and supporting uses in lower but reasonably continuous buildings. This area has the least clear role of any in the town centre as it is neither prime retail nor secondary retail but a mix of all sorts of activities.
- **West Ealing** - is the secondary retail area within the town centre and almost comprises a local town centre in its own right. It contains a good mix of uses and buildings and a more limited number of multiple retailers but within a generally more local mix. West Ealing offers a greater range of major retailers within the convenience sector.

The majority of major retailers are concentrated on The Broadway, in the area bounded by Brownlow Road to the west and Green Man Lane to the east. This area is also in close proximity to other local amenities such as the Public Library, Ealing Magistrates Court, West London Islamic Centre and options for car parking. Buildings are mid-scale and form consistent street frontages onto the Uxbridge Road with a more complicated street arrangement behind. To the north is the core regeneration area of the Green Man Lane Estate, with approval for a significant regeneration and rebuild project.

- 5.19 Ealing metropolitan town centre benefits from a reasonably strong retail and commercial leisure mix, with a number of key national multiple retailer 'attractors' and a well-established more independent-orientated retail mix – particularly identified in the cultural quarter. A key strength of the centre is the strongly defined physical 'character areas' which should form the focus of a town centre strategy moving forwards. This is a strong physical base to build upon, which should also focus on those attractive buildings of architectural interest and character.

Vacancy Rate

- 5.20 The most recent Experian Goad survey (July 2016) highlighted a vacancy rate of 8.4% (29 units) in the Ealing Broadway character area, which is just below the national average of 11.2%. This vacancy level is slightly lower than the results of the Roger Tym 2010 Retail Study update which reported a vacancy rate of 9.6%. GVA updated the Experian Goad survey in February 2017 in order to identify any change to the vacancy rate since July 2016. The on-site survey noted a number of newly vacant units, although these were small units in primarily secondary shopping areas. There were no apparent clusters or 'problem areas' within Ealing Broadway that might require a focused policy response.
- 5.21 The findings from the February 2017 site survey are set out in Table 5.7. It is evident that three previously vacant units have been occupied by cafes and restaurant uses including Wasabi (three previously vacant units combined), Starbucks and Mikka Turkish Cuisine. A further two units on the link between the Ealing Broadway Centre and Oak Road are being refurbished to a high quality to provide one single restaurant unit. Elsewhere across Ealing Broadway, seven units have become newly vacant, but aside from Fat Face these operators were generally smaller, independent retailers of low quality, located in secondary shopping areas. Taking into account re-occupied vacant units, and newly vacant units, Ealing Broadway has 31 vacant units, a small 2 unit increase since July 2016.

Table 5.9: Vacant Unit Update: Ealing Broadway

Re-Occupied Vacant Units (Since July 2016)			
Operator	Address	Category	Use Class
Wasabi	51-51 Ealing Broadway Centre	Leisure Service	A3 Restaurant/Café
Mikka Turkish Cuisine	39-41 New Broadway	Leisure Service	A3 Restaurant/Café
Starbucks	7A-8 Central Buildings, The Broadway	Leisure Service	A3 Restaurant/Café
Newly Vacant Units (Since July 2016)			
Operator	Address	Category	Use Class
Deli Polonia	35 High Street	Leisure Service	A3 Restaurant/Café
Fat Face	61 The Broadway/Ealing	Comparison	A1 Shop

	Broadway Centre		
Star Bar	45 Haven Green	Leisure Service	A4 Drinking Establishment
Gosia Travel Agent	62 The Broadway	Retail Service	A1 Shop
Check In Ladies and Menswear	24 The Broadway	Comparison	A1 Shop
Rumbles Gifts	3A Oak Road	Comparison	A1 Shop
Children's Hope Foundation Charity Shop	51A The Mall	Comparison	A1 Shop

- 5.22 The most recent Experian Goad survey for West Ealing (July 2016) highlighted a vacancy rate of 9.7% (24 units), which – like Ealing Broadway – is just below the national average of 11.2%. GVA updated the Experian Goad survey in February 2017 during the same site visit as that carried out for Ealing Broadway; the reason being to identify any change to the vacancy rate since July 2016. Again, vacant units are generally scattered throughout the West Ealing shopping area, although there is a strong concentration in Chignell Place, a small and run-down 'precinct' set back from Broadway and sandwiched between Brownlow Road and Walsingham Road. The precinct is primarily vacant and has an unattractive and intimidating environment.
- 5.23 The findings from the February 2017 site survey are set out in Table 5.8. It is evident that five previously vacant units have been re-occupied by a range of uses in the A5, B1, D1 and Sui Generis categories; the new operators have not contributed to strengthening the 'shopping' role of West Ealing, but do provide a range of wider town centre uses. Since July 2016, eight units have closed down. These were from a range of businesses including fast food take-aways, estate agents, small convenience stores and carpets/flooring. It is apparent that West Ealing has lost a number of A1 shops over the last seven months, which have been replaced by hot food take-aways and non-retail 'other' town centre uses.

Table 5.10: Vacant Unit Update: West Ealing

Re-Occupied Vacant Units (Since July 2016)			
Operator	Address	Category	Use Class
Pizza Take-Away	131 Uxbridge Road	Leisure Service	A5 Hot Food Take-Away
Private Tuition Office	13 Drayton Green Road	-	B1 Business
TLC Laser Clinic	29 Broadway	Retail Service	D1 Non Residential Institution
Casino	127 Broadway	Leisure Service	Sui Generis
Dominos	140 Broadway	Leisure Service	A5 Hot Food Take-Away
Newly Vacant Units (Since July 2016)			
Operator	Address	Category	Use Class
Ealing Properties	130 Uxbridge Road	Financial & Business Services	A2 Financial and Professional Services
New Ealing Carpets & Flooring	185 Uxbridge Road	Comparison	A1 Shop
Chicken Run	18B Broadway	Leisure Service	A5 Hot Food Take-Away
Wine & Grocery	1-3 Drayton Green Road	Convenience	A1 Shop
Ealing Show Market Grocer	45 Broadway	Convenience	A1 Shop
Cash Generator	86 Broadway	Financial & Business Services	A1 Shop
Farah Hair & Beauty	105 Broadway	Retail Service	A1 Shop
Barbers	111 Broadway	Retail Service	A1 Shop

Planned Investment

- 5.24 As referenced earlier, Ealing Metropolitan Centre has a number of development opportunities with which to enhance the environment and town centre offer. The full schedule is outlined in Section 2, but we detail here those larger strategic sites that are being brought forward to fruition at the current time and will have a more immediate impact on the vitality and viability of Ealing town centre.

Dickens Yard

- 5.25 Dickens Yard is located outside but adjoining the defined Primary Shopping Area in Ealing Metropolitan Town Centre. The mixed use scheme, which ranges from 2 to 14 storeys and has a maximum of 698 residential units, is under construction; Jigsaw has recently been confirmed as the first operator to commit to the scheme, and is scheduled to open for trading in 2018. It has a permitted 'commercial' floorspace of 10,424 sq m, comprised as follows:

- Class A1 (retail) and class A3 (café/restaurant): 9,040 sq m;
- Class B1 (office): 139 sq m;
- Class D1 (community use): 325 sq m;
- Class D2 (health spa): 920 sq m.

- 5.26 St George West London Limited recently submitted a Section 73 planning application in support of an amendment to the approved planning application P/2008/0156 in order to allow the entire c.10,000 sq m commercial floorspace to be granted as flexible A1, A3, A4, D1 and D2 floorspace within the following maximum thresholds:

- Class A3 (café/restaurant uses): 4,000 sq m;
- Class A4 (drinking establishments): 380 sq m;
- Class D2 (assembly and leisure): 2,600 sq m.

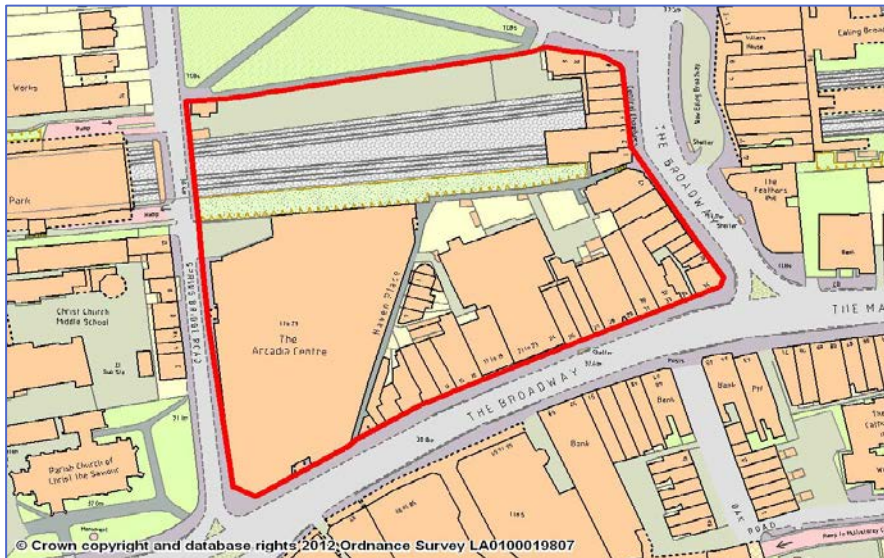
9-42 The Broadway

- 5.27 The proposal site (0.6ha) is located within Ealing Metropolitan Centre, opposite Ealing Broadway Station. The site is bound to the north by the railway line, on its south and east side by The Broadway and on its west side by the newly refurbished shopping centre at 1-8 The Broadway (McDonalds/TK Maxx/Morrisons). The majority of the site is occupied by approximately 8,200 sq m GIA of retail and commercial units.

- 5.28 The proposed uses will be accommodated within 8 new buildings ranging from 2 to 18 storeys in height, providing 188 residential units, 7,765 sq m GIA of retail floorspace

(A1/A3), 913 sq m GIA of flexible retail, community and leisure floorspace (A1/A3/D1/D2) and 598 sq m GIA floorspace for a new music venue (A4/Sui Generis) [all figures include plant and ancillary floorspace]. Retail uses (A1/A3) and flexible A1/A3/D1/D2 floorspace will be accommodated at ground and upper ground floor levels. The Ealing Club will more than double in size providing a new dedicated music, performing arts, comedy and film screenings venue.

EAL3: Arcadia



Note: The Arcadia Centre in south west corner of the site has been developed

- 5.29 The proposed A1//A3/D1/D2 floorspace will be located at ground and upper ground floor levels across 21 units. The A1/A3 floorspace (7,765 sq m GIA) will be located at ground level, and 913 sq m GIA of flexible A1/A3/D1/D2 will be located at upper ground floor level. Larger two storey units will be located on The Broadway to accommodate high street retailers and to provide Ealing with the prime retail accommodation that is currently lacking in the area. Smaller retail/restaurant units will be located within the new mews at Haven Place which are intended for smaller independent occupiers. The combined active frontage of these units will total approximately 350metres which, we understand to be over twice the length that currently exists on Site.
- 5.30 The planning application was formally 'called-in' by the Secretary of State in August 2016; the reasons include the vitality of the town centre, delivering a wide choice of housing, and conserving and enhancing the historic environment. The Inquiry is scheduled to commence on 9th May 2017.

Empire Cinema/Ealing Filmworks

- 5.31 The original cinema site fronting New Broadway was occupied by Empire Cinema until its closure. Full planning permission for a 16 screen cinema with café areas was granted in 2008 (2003/5043), and the planning permission was implemented through the demolition of the majority of the cinema building in 2009, with the exception of the locally listed façade, which has been retained in situ and is supported with steelwork. In 2014 a new outline planning permission and reserved matters applications were granted for (Ref: 2013/3938 and 2014/6489):

"redevelopment of the site (following demolition of existing buildings except for retained cinema façade) to provide multi-screen cinema of up to 2,503 sq m, incorporating up to 900 sq m of other Class D2 leisure space, between 4,509 sq m and 4,934 sq m mixed commercial floorspace (Classes A1/A2/A3/A4/D2) at ground and part first floor level, gallery space (D1) and between 143 and 161 residential units (Class C3) in buildings of between 5 and 7 storeys in height. Creation of public realm, including outdoor performance space."

- 5.32 The scheme, which is now under construction, will retain commercial uses at ground floor and include a large area of public realm within the centre of the scheme, which could be utilised as outdoor performance space. The scheme will enhance pedestrian linkages and connectivity through the site facilitating improved routes from the Town Hall to Matlock Lane/Ealing Green and Bond Street (The Cultural Quarter), helping to create a much needed 'retail circuit' in the town centre.

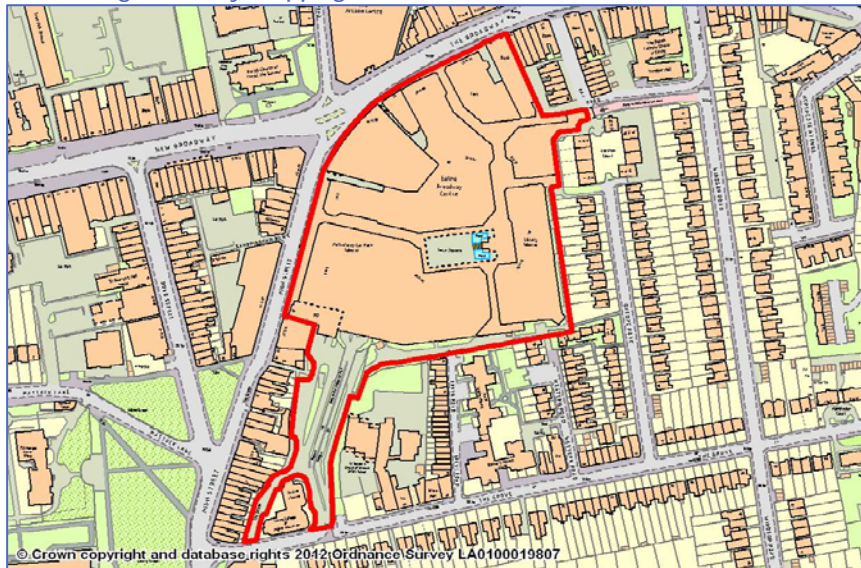
EAL6: Cinema Site



Ealing Broadway Shopping Centre

- 5.33 As noted in Section 2, the site is allocated for refurbishment and where possible redevelopment. The current owners, British Land have committed resources in recent years to refurbishment of the shopping centre in order to modernise and create a more attractive shopping and public realm environment. Some units have been reconfigured and in some cases 'merged' in order to attract certain national multiple operators. Wasabi, for example, has recently occupied three previously vacant units on the entrance to High Street.

EA4: Ealing Broadway Shopping Centre



and quality of the eating/drinking offer in recent years, that there is market demand for representation in Ealing. At present, the physical unit configuration available is meeting the needs of the food/beverage operators, but there is no space/opportunity to enable higher quality clothing/footwear retailers to enter the market at the current time.

- West Ealing performs a different role, with a greater emphasis on convenience goods retailing, leisure and retail services. The comparison goods shopping role is more limited in this part of the Metropolitan Centre, consistent with the more secondary nature of retailing in West Ealing. Vacancy rates are below the national average, and it is concluded that West Ealing is performing adequately, meeting the needs of a more localised catchment area, and offering a more discount retail offer including, for example, Wilko, Lidl and Poundland.
- Ealing metropolitan town centre benefits from a reasonably strong retail and commercial leisure mix, with a number of key national multiple retail 'attractors' and a well-established more independent-orientated retail mix – particularly identified in the cultural quarter. A key strength of the centre is the strongly defined physical 'character areas' which should form the focus of a town centre strategy moving forwards. This is a strong physical base to build upon, which should also focus on those attractive buildings of architectural interest and character.
- 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. Ealing Metropolitan Centre is performing adequately, but the development schemes being brought forward are insufficient on their own to meet the clear qualitative need for a better range and quality of national multiple high street retailers.

Summary

- Ealing Metropolitan Centre is performing adequately. Ealing Broadway provides the core shopping offer characteristic of a higher order centre, albeit the proportion of comparison goods units is below the national average in the footwear and some clothing categories, and retail mix is generally mid-range. Whilst a number of operators are strong attractors (Primark/M&S/H&M), the overall quality, range and breadth is limited. Convenience provision has improved recently and there is a good selection of foodstores available. Leisure services are substantially above national average with a strong proportion of cafes, restaurants, bars and wine bars.
- The clear gap is a greater representation of mid to higher end comparison goods clothing and footwear multiple retailers. It is apparent, given the growth in quantity

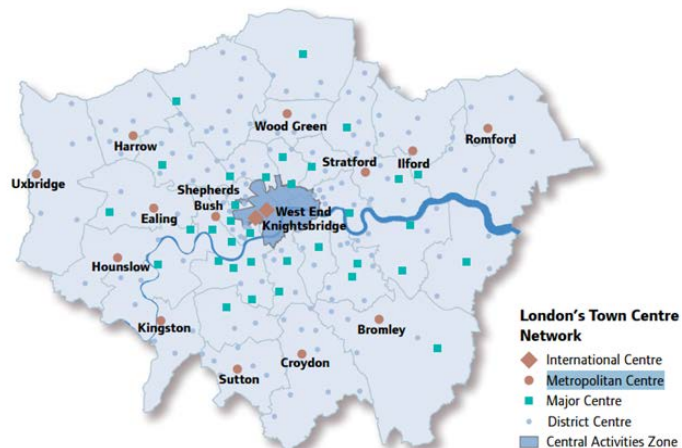
6 BENCHMARKING

6.1 The previous Retail Study confirmed that Ealing was performing as a Metropolitan Centre, a position which will be consolidated to some extent through the Dickens Yard and Cinema site developments, both of which are under construction. Previous sections of this report have, however, highlighted the risk of investment in competing centres and their potential in diverting a growing share of trade away from Ealing town centre. This section benchmarks Ealing against the network of Metropolitan Centres across London to compare and gauge performance, and to help highlight areas of opportunity moving forwards.

6.2 We have drawn on high level Experian Goad data to ensure a consistent and comparable data set, but have had to exclude Stratford on the grounds that this centre has not yet been surveyed by Experian. The centres included in our assessment are illustrated on Map 2.6 below, and include:

- Bromley
- Croydon
- Ealing
- Harrow
- Hounslow
- Ilford
- Kingston
- Romford
- Shepherd's Bush
- Sutton
- Uxbridge
- Wood Green

Map 2.6 London's town centre network



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6.3 Drawing on Experian Goad, the data benchmarks Ealing alongside the existing Metropolitan Centres in the following 'town centre' criteria:

- Total Town Centre Floorspace;
- Multiple Outlet Count;
- Total Leisure Floorspace;
- Total Café Floorspace;
- Total Restaurant Floorspace;
- Total Bar/Wine Bar Floorspace;

6.4 The outputs are illustrated in Figure 6.1-6.6 below. The outputs confirm that Ealing is performing at a high level, with scale and composition being consistent with the range of Metropolitan Centres. In particular, Ealing has a strong number of outlets (Fig.6.2) and multiple outlet count (Fig.6.3), and purely in terms of 'quantity', Ealing performs well. In terms of mix of uses, however, Ealing has a strong level of convenience goods floorspace (Fig 6.4), but a low level of comparison goods floorspace (Fig 6.5) compared to other Metropolitan Centres.

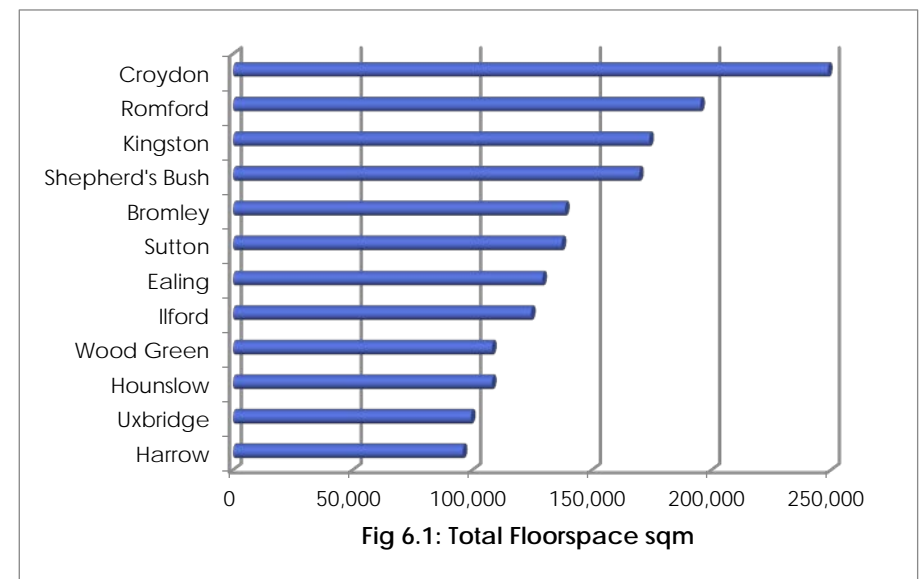
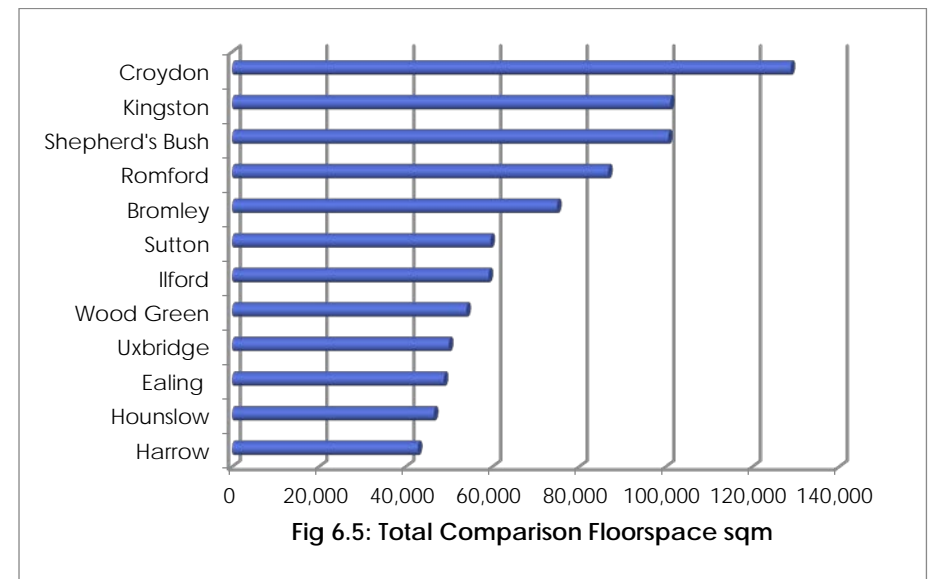
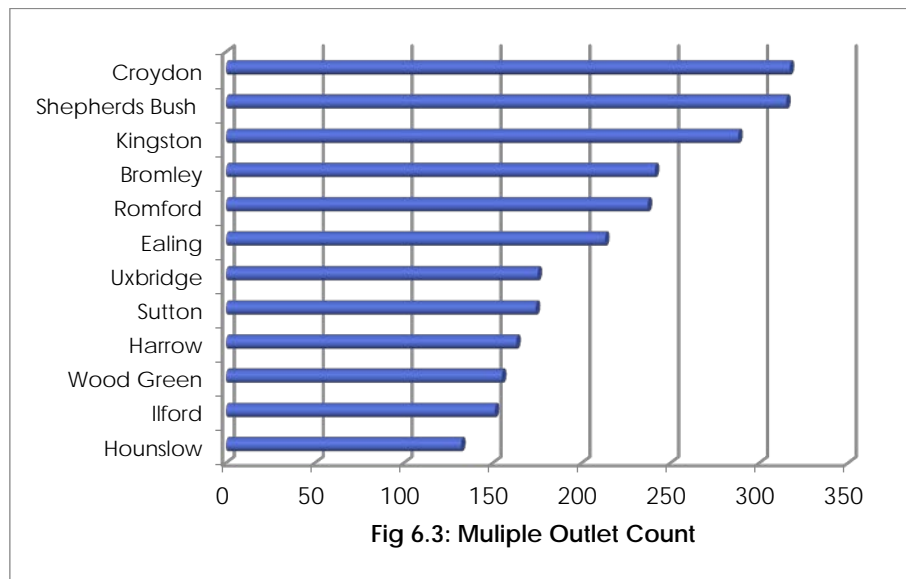
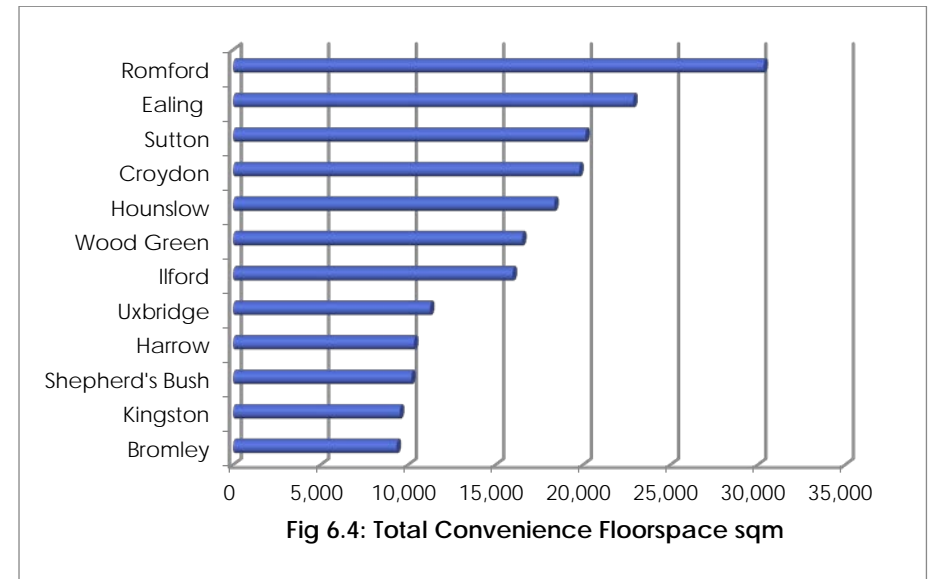
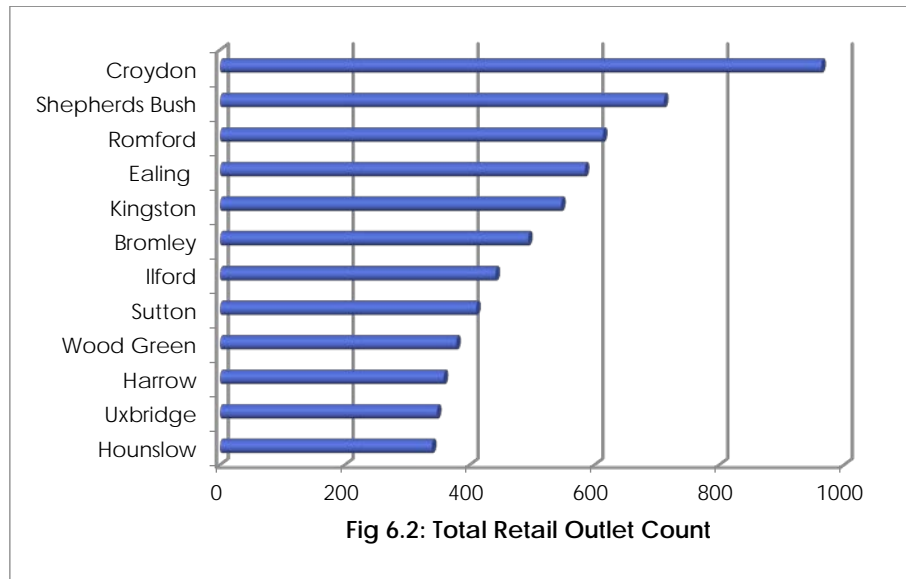
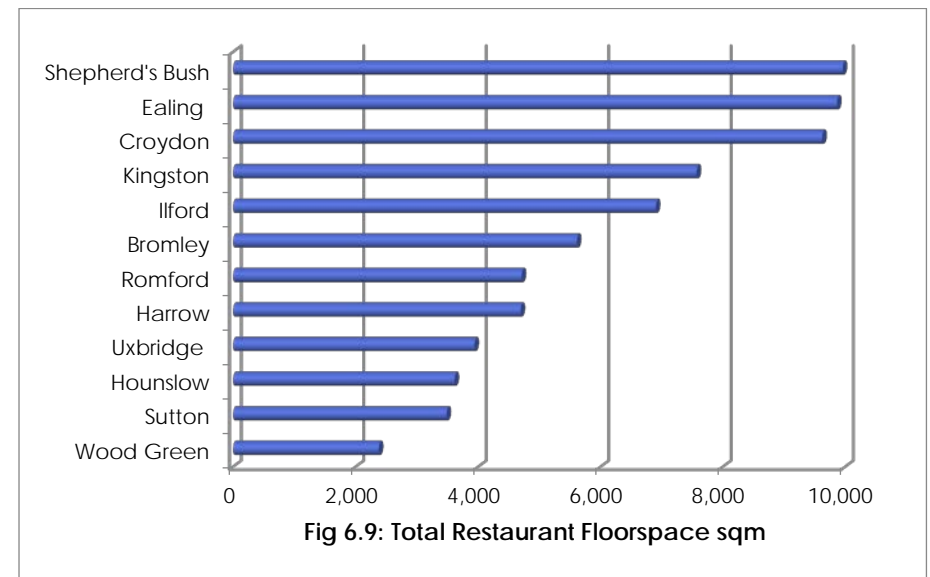
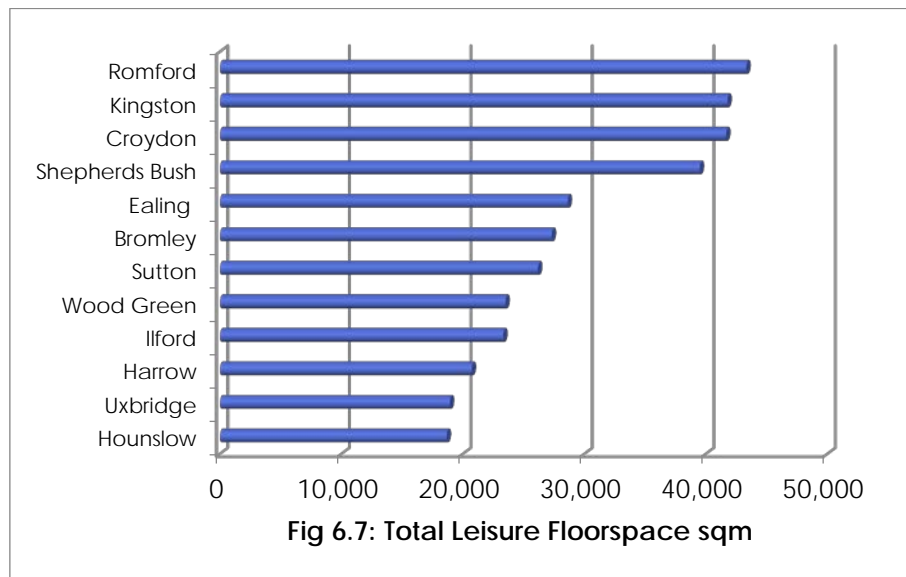
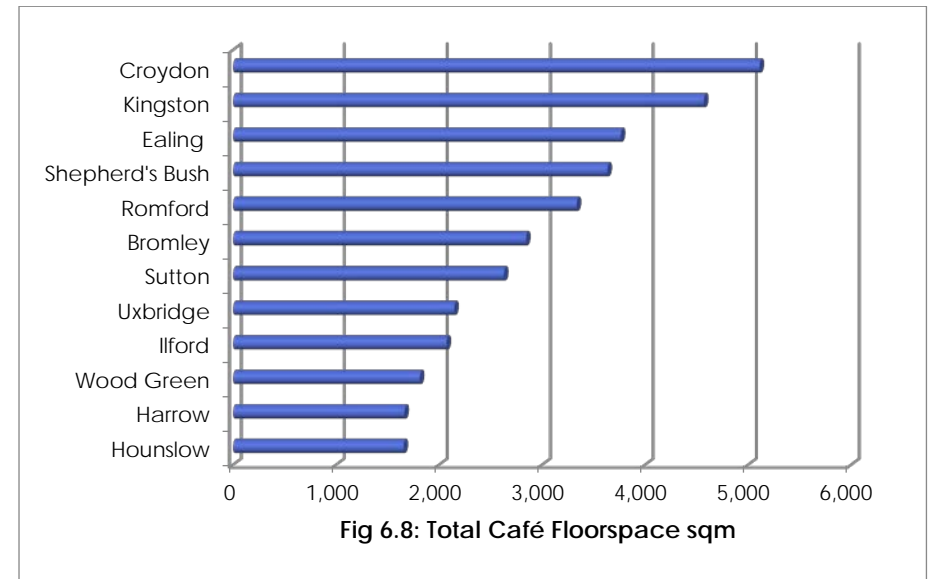
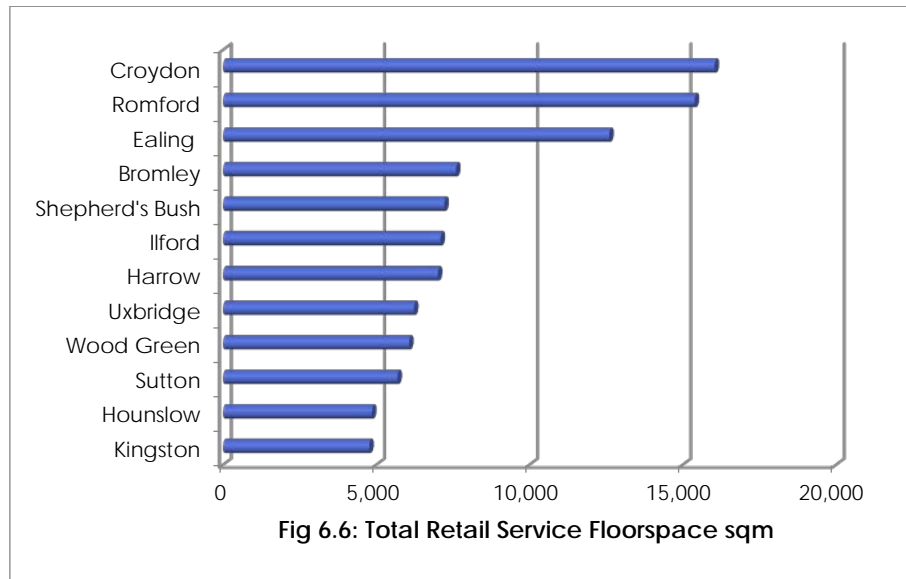


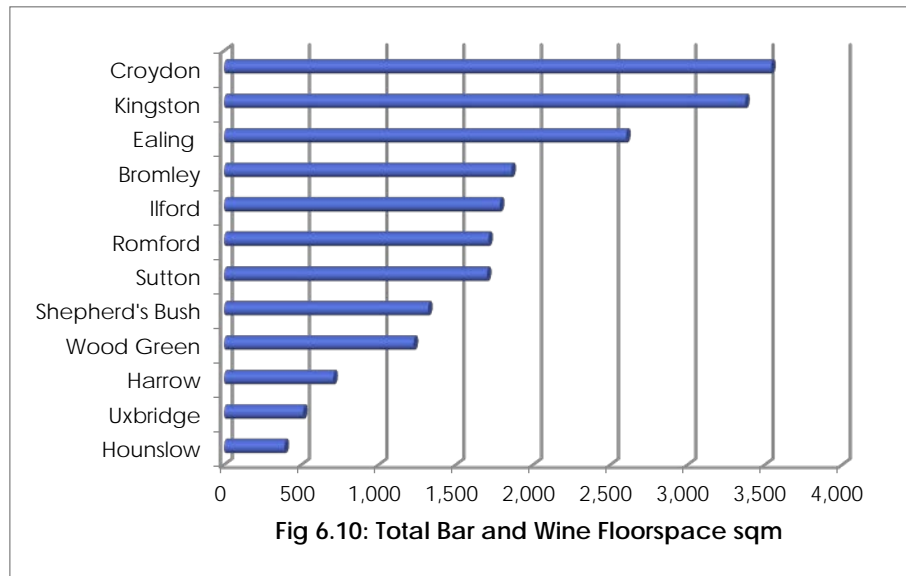
Fig 6.1: Total Floorspace sqm





- 6.5 In terms of other town centre uses, Ealing Metropolitan Centre has a strong level of Retail Service floorspace (health & beauty/dry cleaners/opticians), and a significant level of leisure service floorspace (cafes/restaurants/bars) compared to other Metropolitan Centres – positioned 2nd and 3rd for restaurants and cafes respectively. This is consistent with the findings of the qualitative health check review undertaken in Section 5.

should consider protecting the core Use Class A1 Primary Shopping Frontage whilst also facilitating the introduction of larger retail units into the Metropolitan Centre. It will be important for Ealing to enhance the comparison goods shopping offer over the plan period in order to continue to compete effectively with the network of Metropolitan London Centres.



Summary

- The findings of the benchmarking exercise confirms earlier outputs in this report, notably that Ealing is performing the role of Metropolitan Centre with a strong number of operators but a unit configuration largely restricted in size. As a consequence the floorspace of Ealing is a weaker benchmark than the number of units. It is also apparent that the level of comparison goods floorspace is low when compared to the network of Metropolitan Centres. The opportunity for Ealing is to improve the supply of larger retail units to meet the operational requirements of comparison goods multiple retailers (clothing/footwear).
- Again, consistent with the qualitative assessment of Ealing, the town centre has a particularly strong level of leisure floorspace, positioned 2nd and 3rd in the café and restaurant sector. Whilst a diversity of uses is important in a town centre, the Council

7 CONCLUSIONS

- 7.1 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.
- 7.2 The analysis found Ealing Metropolitan Centre to be performing adequately, 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. 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.
- 7.3 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'.
- 7.4 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.