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PLANS & APPENDICES: BOUND SEPARATELY

EXECUTIVE SUMMARY

Scope of Work

- 1.1 GVA Grimley was instructed by the three West London Authorities (WLA's – London Borough of Ealing, London Borough of Hammersmith & Fulham and London Borough of Hounslow) in August 2006 to undertake the West London Retail Needs Study. The study was completed in December 2006 and the information was up to date as of December 2006. The joint study is driven by a recognition of significant cross border and sub-regional issues. In this context it aims to address the interrelationship between the centres and the dynamics of the changing network of centres within the sub-region.
 - 1.2 The purpose of this study is to inform and guide town centre/retail planning in West London, and in particular, to input into the preparation of each authority's forthcoming Local Development Framework (LDF). Based on our research, analysis and overall findings, this strategic study specifically identifies the performance of centres and the need for retail and leisure floorspace to the period 2016, and beyond to 2021. The study covers both convenience and comparison goods retailing.
 - 1.3 Our terms of reference are to:
 - Examine the retail hierarchy in West London and the wider sub-region, and advise on the role of each centre and their relationship to each other in the retail hierarchy;
 - Establish the extent to which current retail and leisure provision within West London satisfies the level and nature of consumer demand within each catchment;
 - Estimate the scale and nature of any changes in this position that may arise in the light of:
 - Potential increases in population;
 - Forecast changes in retail expenditure;
 - Changing forms of retail and leisure provision;
 - Possible increases or decreases in the trade draw from competing centres.
 - Identify the scale and nature of additional retail and leisure provision that may be appropriate in West London to the period 2021.
 4. Our approach draws on the emerging recommendations of our Good Practice Guidance for the Department of Communities and Local Government (DCLG) on how to assess the need for, and impact of key town centre uses. Of particular relevance to this study, we have recommended a transparent approach, where the key steps of the analysis, data inputs and assumptions are clearly
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set out and justified. In accordance with the Good Practice Guidance, our approach is also underpinned by the use of up to date household telephone interviews and in-centre surveys to help establish current shopping and leisure patterns, town centre catchments and market share estimates for both comparison and convenience goods retailing.

5. This Study also comprises detailed audits and qualitative healthchecks of the relative vitality and viability of each Borough's major and smaller centres based, where possible, on the key performance indicators set out in PPS6 (paragraph 4.4).
6. In addition, we have carried out a broad review of national and regional trends in Black and Minority Ethnic (BME) retailing. We specifically examine the contribution that BME retail businesses make to the retail industry as a whole, as well as the overall vitality and viability of the main West London centres. We also set out the key drivers of (and challenges to) the future growth of this sector, and the extent to which planning policy can help to maintain and promote BME retailing.
7. Given its strategic importance across London, we have also reviewed and referred to the Greater London Authority's (GLA) strategic '*Town Centre Need Assessments*' (2004/2005) for comparison and convenience goods retailing. Although the GLA study is a strategic high level assessment of need, we have necessarily benchmarked our assumptions at the sub-regional level against it in order to highlight and describe the main variations in our approach.
8. This West London Study provides a robust and sound baseline evidence for the three London Boroughs to assess the network of centres and their relationship in the West London hierarchy, as well as the quantitative and qualitative need for new retail and leisure floorspace over the forecast period. This study will underpin future work elements including policy formulation and monitoring, the development of town centre strategies and the identification and allocation of potential development opportunity sites.

Policy Context

9. Planning Policy Statement 6 (PPS6) entitled 'Planning for Town Centres' was published in March 2006 and sets out the main issues and guidance relating to planning for the future of town centres and the main uses that relate to them. The key points of relevance to the West London Centres, are:-
 - The need to take a more proactive approach to accommodating town centre uses in central locations, including where appropriate promotion of the expansion of town centres; and, conversely a realistic approach to the management of decline where justified; and
 - The need to establish a hierarchy of centres in each region and sub-region, with any change in the role and function of centres to be secured as part of the preparation of regional spatial
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strategies (RSS) and through preparation of the development plans, rather than through individual applications.

10. The central objective of PPS6 is evidently, therefore, to promote the vitality and viability of town centres by planning for their growth and development. Where development is not suitable, viable and/or available in town centre and/or edge-of-centre locations, then PPS6 promotes the expansion of existing town centre boundaries, where possible. This study provides the baseline to assist the review of town centre boundaries in the next phase of work, which will need to focus on policy recommendations, town centre strategies and site allocations.
11. The three West London Authorities will also need to demonstrate a much more proactive approach to the planning and expansion of their main centres. PPS6 requires local authorities to plan for improvements to the range of services offered in local centres and to manage decline and change in any centres which can no longer realistically maintain their place in the retail hierarchy. This needs to be applied, in the context of regional policy, at the local level by the three West London Authorities in their Local Development Frameworks (LDF's). In the context of PPS6, follow on work will require the identification and allocation of development sites, along with strategy and policy recommendations. We discuss this in more detail at the end of this Section: The Next Steps.
12. In terms of regional policy context, the London Plan (2004), is a strategic plan setting out an integrated social, economic and environmental framework for the future development of London in the next 15-20 years. Within the London Retail Hierarchy, Ealing and Hounslow are identified as Metropolitan Centres; Southall, Hammersmith, Fulham and Chiswick are Major Centres; and Acton, Greenford, Hanwell, Shepherd's Bush, Feltham and Brentford are District Centres.
13. The GLA 'London Wide Comparison and Convenience Goods Floorspace Needs Assessments', developed a range of strategic capacity projections based on different scenarios. The Experian analysis does provide useful baseline data indicating population change and expenditure growth projections on a London-wide basis, and is also helpful in understanding the scale and implications of major schemes in the pipeline. It sets out the network of centres across London which enables an understanding of the scale, distribution and role of centres; and provides an indication of general areas of need for new floorspace.
14. The studies do not, however, provide the detailed evidence base needed by local authorities for the preparation of LDF policies, or to guide development control decisions at the local level. In accordance with national and GLA recommendations, therefore, this study has been commissioned to ensure a focused qualitative and quantitative assessment at a more localised level, in order to feed into informed sensitivity testing and, eventually, recommendations for development at the local level.

Survey Data/Evidence Base

15. The importance of a robust evidence base to underpin the Local Development Framework cannot be underestimated. In developing our methodology, we have drawn on established best practice and our extensive experience in this field. In particular, GVA Grimley are responsible for preparing the forthcoming DCLG Good Practice Guidance on Retail/Leisure Need and Impact Assessments. This sets out a number of basic guiding principles, including the need for a transparent methodology, and the use of up to date surveys as a means of establishing current shopping patterns, town centre catchments and market shares.
16. In order provide detailed information on the current shopping patterns in the West London Study Area, we commissioned a new household telephone survey covering 3,000 households across 30 agreed Zones, distributed proportionately to the population in each Zone. Unlike anywhere else in the UK, London is a highly populated urban area with a complex network of centres and varied shopping patterns. Our methodology therefore strongly recommended sufficient zones, of an appropriately small size, to cover the local level and effectively define the catchment areas of centres.
17. Drawing on our experience, it is clear from our review of shopping patterns and penetration rates, that this process has achieved the robust evidence base required to underpin the Local Development Framework. In addition, the methodology and findings enable the three West London Authorities to review the study area as a whole, but perhaps more importantly, to plan at the local level in terms of policy and development control decisions.

Sub-Regional Context/Competing Centres

18. The Study has reviewed the relationship of the three West London Authorities with the wider sub-region. In particular, it describes the influence of key competing neighbouring strategic centres on the current and future role of the West London centres. The review drew extensively on the household telephone survey data, discussions with the relevant local authorities, and a number of other in-house data sets and sources.
 19. In terms of the sub-regional context, the Household Telephone Survey identified Kingston, the West End, Uxbridge, Staines, Harrow, Richmond, Kensington High Street, Brent Cross and Kings Road as the key competing centres. It is clear that the West End and Kingston are the greatest threat given their trade draw, scale and quality of retail offer, rents, proximity, rank position and development opportunities coming forward over the forthcoming LDF period.
 20. The key performance indicators considered show that Ealing is ahead of many competing centres, as would be expected for a Metropolitan Centre, although it lacks a major department store anchor and high end fashion retailers. However, Hounslow is ranked behind a number of competing centres,
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despite its metropolitan centre status, and Hammersmith is also out-performing Hounslow on some of the KPIs.

21. The survey results and KPIs also indicate that the Kings Road, Brent Cross and Richmond provide either a quality/niche retail offer for residents in the West London area, or function as destination/day-out shopping locations. The scale, quality and relatively unique offer of these three shopping locations means that they will continue to represent significant attractions to residents in the three West London authority areas.
22. Uxbridge, Staines and Harrow function as more mainstream third tier centres. Although they offer less competition to main West London Centres, it is clear that they are achieving a market share of available spend within the defined study area. Nevertheless, there are few major planned retail developments and/or proposals being promoted in these centres. Therefore, through effective strategies and the identification of key development opportunities, it should be possible for the larger centres in the three West London Boroughs to strengthen the scale and quality of their retail offer, thereby providing greater competition to centres such as Kingston, Uxbridge and Staines in the future.
23. Our review of recent new developments, future commitments and proposals has highlighted the fact that centres in the three West London Authorities face strong and increasing competition from centres in neighbouring authorities and the wider West London area, both in terms of the scale and quality of the competing retail and leisure offer.
24. The future challenges to the West London centres will be further intensified by the proposals to extend Brent Cross Shopping Centre, as part of the wider Brent Cross/Cricklewood/West Hendon Regeneration Area, as well as the White City and Wembley (Quintain) developments. The scale, character and potential impact of these major new retail schemes on shopping patterns in the West London study area are considered in more detail in the remainder of this study.

Global Capacity Projections

26. We have forecast capacity projections within the three West London Authorities to the period 2021 for comparison goods floorspace. The methodology has tested the implications of committed developments and incorporated a range of expenditure growth and floorspace efficiency scenarios. On this basis, we have identified capacity for between 201 sq m net and 29,446 sq m net of additional comparison goods floorspace by 2011. This range incorporates all comparison goods proposals and commitments, and is based on current market shares. By 2016, following further population and expenditure growth, we calculate capacity for between 38,808 sq m net and 105,547 sq m net; and by 2021 this is set to grow to between 81,501 sq m net and 195,958 sq m net.
 27. We have undertaken a similar process of scenario testing for convenience goods floorspace. When all commitments have been incorporated we forecast capacity for between 11,267 sq m net and
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13,469 sq m net by 2011, growing to 14,027 – 18,467 sq m net by 2016; and again to 16,901 sq m net – 23,790 sq m net by 2021. This is based on a £12,000 sales density, a level most major foodstore operators would aim to achieve.

London Borough of Ealing

28. The quantitative headline conclusions for the London Borough of Ealing can be summarised as follows: -

- Zones 4-10 are the best-fit Zones to the Borough boundary;

Comparison Goods

- Available comparison goods expenditure per person (per annum) is higher than the UK average, but lower than the survey area (Zone 1-30) average;
- The competing centres of the West End, Brent Cross, Harrow, Uxbridge, Kingston, Richmond, Kensington, Chelsea and Staines capture £192.3m of comparison goods expenditure from Zone 4-10 (21% market share);
- The West End captures the greatest proportion of this trade (6.8% market share); followed by Brent Cross (4.4%); Harrow (4.2%) and Uxbridge (3.2%);
- The major Borough centres of Ealing, Southall, Acton, Hanwell, Greenford and borough retail warehousing capture £493.2m of comparison goods expenditure from Zone 4-10 (43% market share);
- The remaining 36% of comparison goods expenditure in Zone 4-10 is directed towards other small scale retail provision in the Borough, retail warehouse provision beyond the Borough and other competing centres beyond the Borough not already mentioned above;
- When all commitments have been factored in, we forecast comparison goods floorspace capacity of between -3,027 sq m net to 4,962 sq m net by 2011; growing to between 5,821 sq m net and 24,111 sq m net by 2016; and again to 15,534 sq m net and 46,577 sq m net by 2021. These ranges are based on the expenditure growth and sales efficiency scenarios tested within our methodology.
- The identified comparison goods commitments factored into this assessment, will have an impact on Ealing town centre (13.4%); Acton town centre (2%); Greenford town centre (16.1%) and Hanwell town centre (7.6%);
- Taking on board proposals for the Southall Gas Works site, we forecast that the scheme will have a positive impact on market share in Zone 10, although the impact of the scheme on the town centre should be reviewed in detail when proposals are finalised. This Study has reviewed the uplift of market share in Zone 10 (which comprises Southall town centre and the

Gas Works site), but there could be a negative impact on the town centre depending on scheme composition and linkages. The next steps should review this carefully.

Convenience Goods

- Available convenience goods expenditure is lower than both the UK and survey area (Zone 1-30) average;
- Convenience goods floorspace within the Borough captures 62% of available convenience goods expenditure within Zones 4-10. The remaining expenditure leaves the Borough as leakage;
- Factoring in all known commitments, we forecast capacity for up to 7,644 sq m net of convenience goods floorspace by 2011, growing to 9,100 sq m net by 2016, and again to 10,648 sq m net by 2021. This assumes a £12,000 per sq m net sales density.

London Borough of Hammersmith & Fulham

29. The quantitative headline conclusions for the London Borough of Hammersmith & Fulham can be summarised as follows:-

- Zones 1 to 3 are the best fit zones to the Borough boundary;

Comparison Goods

- Available comparison goods expenditure per person (per annum) is higher than both the UK average and survey area (zone 1-30) average;
- The competing centres of the West End, Kensington, Chelsea, Kingston, Brent Cross, Richmond, Harrow and Uxbridge capture £194.8m of comparison goods expenditure from zone 1-3 (30%) market share; the West End captures the greatest proportion of this trade (15.1 % market share); followed by Kensington (7.7%); Chelsea (3.6%) and Kingston (1.7%);
- The major point borough centres of Hammersmith, Fulham and Shepherd's Bush and all borough retail warehousing, capture £261.4m of comparison goods expenditure from zone 1-3 (31% market share);
- The remaining 39% of comparison goods expenditure in zone 1-3 is directed towards other small scale retail provision in the Borough, retail warehouse provision beyond the Borough and other competing centres beyond the Borough not already mentioned above;
- After all comparison goods commitments have been factored into the model we forecast a borough wide floorspace capacity of between 21,698 sq m net and 52,445 sq m net by 2016. This is forecast to grow to between 44,777 sq m net and 98,005 sq m net by 2021. These ranges are underpinned by scenario testing of expenditure growth rates and floorspace sufficiency.

- The comparison goods commitments identified will have a negative impact on Hammersmith & Fulham of 11.6% and 7.8% respectively.
- The implementation of White City will, however, have a largest positive impact on any of the larger centres, achieving an overall turnover of £664m by 2011, equating to a positive impact of 654.5%.

Convenience Goods

- Like comparison goods, spend per capita for convenience goods is higher than both the UK and survey area (zones 1-30) average;
- Convenience goods floorspace within the Borough captures 57.9% of available convenience goods expenditure within zones 1-30. The remaining expenditure leaves the borough as leakage;
- Following the implementation of commitments, capacity projections indicate capacity for up to 2,478 sq m net by 2011, growing to 4,074 sq m net by 2016, and again to 5,805 sq m net by 2021. This is based on a £12,000 per sq m net sales density.

London Borough of Hounslow

30. The quantitative headline conclusions for the London Borough of Hounslow can be summarised as follows:

- Zones 11-17 are the best fit zones to the borough boundary;

Comparison Goods

- Available comparison goods expenditure per person (per annum) is higher than the UK average, but lower than the survey area (Zones 1-30) average;
- The competing centres of Kingston, the West End, Staines, Richmond, Brent Cross, Kensington, Uxbridge, Chelsea and Harrow capture £184.4m of comparison goods expenditure from zone 11 to 17 (27% market share);
- Kingston captures the greatest proportion of this trade (11.5% market share); followed by the West End (5.4%); Staines (4.4%) and Richmond (3.5%); the major borough centres of Hounslow, Feltham, Chiswick and Brentford, and borough retail warehousing provision, capture £354m of comparison goods expenditure from Zone 11-17 (41.5% market share); the remaining 31.5% of comparison goods expenditure in Zone 11-17 is directed to other small scale retail provision in the borough, retail warehouse provision beyond the borough and other competing centres beyond the borough not already mentioned above;
- When all comparison goods commitments have been factored in, and based on scenario testing of expenditure growth rates and sales efficiency rates; we forecast capacity for between 2,067

sq m net and 9,728 sq m net by 2011. This is forecast to grow to 11,289 sq m net and 28,991 sq m net by 2016 and again to 21,190 sq m net and 51,376 sq m net by 2021.

- The commitments for comparison goods floorspace identified within this study will have a negative impact on Brentford and Chiswick town centres, of 12.9% and 8.6% respectively.
- In contrast, due to new town centre schemes coming forward we calculate a positive impact on Hounslow and Feltham town centres, of 28.3% and 80.1% respectively.

Convenience Goods

- Available convenience goods expenditure per person (per annum) is lower than both the UK and survey area (Zone 11-17) average;
- Convenience goods floorspace has a stronger influence in the Borough of Hounslow and Ealing and Hammersmith & Fulham, and such floorspace within the Borough captures 76.7% of available convenience goods expenditure within zones 11-17. The remaining expenditure leaves the borough as leakage;
- Once all commitments have been factored in, we forecast capacity for up to 3,347 sq m net of additional convenience goods floorspace by 2011, growing to 5,294 sq m net by 2016, and again to 7,337 sq m net by 2021. This is based on a £12,000 per sq m sales density.
- Focusing on the four major study centres, it is clear that capacity for new foodstore provision arises in Chiswick town centre and Brentford town centre, although there is no identified capacity by 2021 in Hounslow or Feltham town centres.

Leisure Sector

31. Our assessment of the leisure sector in West London indicates a reasonable range of commercial leisure facilities including cinemas, bingo clubs, ten-pin bowling destinations, bars, clubs and restaurants, and health and fitness clubs. There are, however, evident gaps and deficiencies in the quality of some facilities.
32. In terms of cinema provision, there are commitments for a new 16-screen replacement cinema in Ealing, a multiplex cinema in the White City development which we understand could have up to 20 screens, and a 10-12 screen cinema in the new Blenheim Shopping Centre in Hounslow. Our assessment concludes that there is an identified gap in provision in the central and western part of Ealing, and the eastern part of Hounslow. It is clear from the quantitative analysis, that if the three West London Authorities are to bring themselves in line with the UK average a further 21 cinema screens are needed. Assuming only 50% of committed screens are implemented in the three West London Authorities, they will meet the full identified need.

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33. Qualitative gaps in cinema provision will remain, however, in the west of Ealing Borough (Zone 7-10) and the east of Hounslow Borough (Zone 16/17). Provided the sites and investor confidence are present, and they form a suitable addition to enhance a town centre, we consider these parts of the study area could support smaller scale, 4-8 screen cinemas. We do not consider there is a need for additional cinema provision in Hammersmith & Fulham.
34. In terms of bingo clubs, our assessment identifies that Hounslow is relatively well provided for, but there is a deficiency in provision in qualitative and quantitative terms in the northern part of Hammersmith & Fulham, and the central and western part of Ealing Borough. At present, there are only two ten-pin bowling facilities within the three boroughs, and we conclude that facilities would meet qualitative deficiencies in Hammersmith & Fulham, the western part of Ealing Borough and the eastern part of Hounslow Borough.
35. There is a wide variety of health and fitness clubs across West London, although provision within a 500m walk-in distance is more dense in the eastern areas in the vicinity of Hammersmith & Fulham, Chiswick, Acton and Ealing. Provision does, however, become less dense in the western part of Ealing and Hounslow Boroughs. Provided the market demand is there, and the sites exist, health & fitness clubs should usually be encouraged within town centres and within mixed-use retail/residential schemes. The market has grown strongly in recent years, and Mintel research predict this trend will continue as awareness of personal health and fitness becomes more widespread throughout different sectors of the population.
36. In terms of pubs/clubs, the most popular destinations appear to be Ealing, Richmond, London West End, Chiswick, Hammersmith, Hounslow, Fulham and Twickenham. Local residents are choosing to visit Ealing, Chiswick, Richmond, London Central, Fulham, Twickenham, Hounslow, Harrow and Hammersmith most often for restaurants. There is evidently some leakage to competing town centres to reach alternative evening economy/entertainment destinations. Follow-on work will be required to consider policy recommendations with which to control such uses.
37. In terms of town centre restaurant/bar facilities, and based on national trends discussed in the background paper (Appendix 18), we assume 15% of comparison goods town centre schemes will comprise A3/A4 leisure floorspace. Based on comparison goods capacity projections (4.3% expenditure growth / 2% sales efficiency scenario), we forecast capacity for an additional 2,559 sq m net of restaurant/bar floorspace in Ealing Borough by 2016; 7,243 sq m net in Hammersmith & Fulham Borough, and 2,887 sq m net in Hounslow Borough.

Implications

38. This study has clearly set out capacity first globally, second by Borough, and third within each of the 12 major study centres. We have reviewed the sub-regional context, inflows and outflows of trade, trade retention and baseline capacity projections up to 2021 excluding commitments. We then tested

a series of expenditure growth scenarios and sales efficiency levels, and set out the impact of commitments on capacity. Our understanding of the network of centres and their vitality and viability, developed throughout this study, has been crucial in our review of the implications of commitments (or impact).

39. The findings of our analysis have effectively demonstrated that where major schemes are being implemented, the market share of that centre will be substantially enhanced, strengthening the position of that centre in the hierarchy. Likewise, where centres have no schemes coming forward, i.e. a 'do nothing' scenario, the market share declines and capacity for new floorspace declines. For example, Hounslow, Shepherd's Bush and Feltham all have commitments coming forward which have strengthened their market share. In contrast, Ealing, Acton, Greenford, Hanwell, Hammersmith, Fulham, Brentford and Chiswick currently have no committed schemes. Southall Gas Works will enhance market share in Zone 10 and impact on capacity in the larger West London centres through claw back of trade, although the impact on Southall town centre should be carefully reviewed when proposals are finalised.
40. It is important to point out that capacity projections set out in this report should not deter new development coming forward over and above the identified capacity figures. Indeed, new development and improvements to town centres and their overall retail and leisure offer, which would enhance market share, should be encouraged. In a 'do nothing' scenario, centres will decline and be unable to hold their position in the retail hierarchy. Other factors do, however, need to be taken into consideration, and follow-on work should support strategies for centres which start to focus on the commercial perspective, for example discussions with developers and reviewing the viability of sites.
41. Informed by this piece of work, which sets out the baseline position, the opportunities and threats raised by committed development, and the role and relationship of centres, the three local authorities now need to focus on policy formulation and the means to enhance their town centres. It is now important to 'marry up' economic capacity forecasts and physical capacity, focusing on site availability, developer interest, site viability and timescales. If the sites are available and viable, there is no barrier to developing schemes which in turn will enhance market share, enabling a greater level of floorspace to be supported.

Next Steps

42. Drawing on the key findings and recommendations of the Retail Study, we briefly set out below some of our recommendations as to the 'next steps' for the boroughs to consider, either jointly or individually, by way of a natural follow-up and extension to our work.
 43. We consider that the next important step for each of the boroughs is to identify where the forecast capacity for new retail and commercial leisure floorspace should be accommodated. PPS6 is clear that the aim should be to locate the appropriate type and scale of development in the right type of
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centre to ensure that it fits into that centre and that it complements its role and function. In terms of the sequential approach, it is also clear that all options in existing centres (including, where necessary, the extension of centres) should be thoroughly assessed first before less central sites are considered for the development of main town centre uses.

44. Each of the boroughs should take a more proactive and positive approach to site identification and development, working closely with developers, businesses, the community and other key stakeholders to identify and assess appropriate sites for allocation in their development plan documents. In planning for growth in their town centres, each authority should allocate sufficient sites to meet the identified need (and market demand) for at least the first five years from the adoption of their development plan documents. The West London boroughs should also, where appropriate, include policies and proposals in their development plan documents for the phasing and release of development sites. In specific cases they may need to help deliver development through site assembly and, where necessary, the use of their CPO powers.
 45. This 'marrying up' of economic capacity, with the 'physical capacity' of centres to accommodate the forecast need for new retail and leisure floorspace represents a major challenge for local planning authorities across the UK. This is a particular challenge in those centres where the local authority has little or no ownership, where there are constraints to new development and/or there is no scope to extend primary shopping areas and town centre boundaries. Even where sequential sites are identified to meet need, local planning authorities face the challenge of delivering high quality new mixed use development, that improves the health, vitality and economic potential of their centres during the daytime and evenings.
 46. In the face of these "challenges", we strongly recommend that each West London borough prepare robust strategies for those centres where strategies do not already exist, or have not yet been commissioned. In accordance with good practice, such strategies would need to be underpinned by detailed consultation and partnership-working with the private sector, key public sector bodies, the community and other stakeholders. The aim should be to deliver sound and robust visions, strategies, action and implementation plans that help to deliver the effective management, promotion and development of town centres. It is fundamental that these strategies are commercially viable and deliverable, whilst at the same time being underpinned by a high quality design, transport and sustainability framework.
 47. In our experience the development of sound, robust, effective and deliverable strategies will necessarily require a joined-up approach across the West London boroughs, building on the findings and recommendations of our Retail Needs Study. It will also require a joined-up approach within each individual local authority to ensure that key individuals and teams (including planning, economic development, regeneration, housing, transport, etc.) are working towards the same objectives. Without strong leadership, political support, joined-up thinking and realistic objectives, the strategies will (in our experience) fail to deliver what they set out to achieve.
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1. INTRODUCTION

1.4 GVA Grimley was instructed by the three West London Authorities (WLA's – London Borough of Ealing, London Borough of Hounslow, and London Borough of Hammersmith & Fulham) in August 2006 to undertake the West London Retail Needs Study. The study was completed in December 2006 and the information was up to date as of December 2006. The joint study is driven by a recognition of significant cross border and sub-regional issues. In this context it aims to address the interrelationship between the centres and the dynamics of the changing network of centres within the sub-region. The West London Study Area is illustrated on Plan 1.

1.5 The purpose of this study is to inform and guide town centre/retail planning in West London, and in particular, to input into the preparation of each authority's forthcoming Local Development Framework (LDF). Based on our research, analysis and overall findings, this strategic study specifically identifies the performance of centres and the need for retail and leisure floorspace to the period 2016, and beyond to 2021. The study covers both convenience and comparison goods retailing.

Terms of Reference:

1.6 Our terms of reference are to:

- Examine the retail hierarchy in West London and the wider sub-region, and advise on the role of each centre and their relationship to each other in the retail hierarchy;
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- Estimate the scale and nature of any changes in this position that may arise in the light of:
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 - Possible increases or decreases in the trade draw from competing centres.
- Identify the scale and nature of additional retail and leisure provision that may be appropriate in West London to the period 2021.

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- 1.9 In addition, we have carried out a broad review of national and regional trends in Black and Minority Ethnic (BME) retailing. We specifically examine the contribution that BME retail businesses make to the retail industry as a whole, as well as the overall vitality and viability of the main West London centres. We also set out the key drivers of (and challenges to) the future growth of this sector, and the extent to which planning policy can help to maintain and promote BME retailing.
- 1.10 Given its strategic importance across London, we have also reviewed and referred to the Greater London Authority's (GLA) strategic '*Town Centre Need Assessments*' (2004/2005) for comparison and convenience goods retailing. Although the GLA study is a strategic high level assessment of need, we have necessarily benchmarked our assumptions at the sub-regional level against it in order to highlight and describe the main variations in our approach.
- 1.11 This West London Study will provide robust and sound baseline evidence for the three London Boroughs to assess the network of centres and their relationship in the West London hierarchy, as well as the quantitative and qualitative need for new retail and leisure floorspace over the forecast period. This study will underpin future work elements including policy formulation and monitoring, the development of town centre strategies and the identification and allocation of potential development opportunity sites.

Structure of the Study

- 1.12 This report draws together the results of this process and is structured as follows:-
- In Section 2, we summarise the national policy framework that provides the policy context for this study.
 - In Section 3, we review the regional policy framework, reviewing the points of relevance from The London Plan, The West London Sub-Regional Development Framework, and the GLA Retail Needs Assessment.
 - In Section 4, we summarise the key components of the local policy framework relevant to the three West London authorities, including the current retail hierarchy definitions.
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- Section 5 sets out the regional context and the main competing centres outside of the three West London authority areas. We outline the factors we have taken into account in determining the wider study area and describe the role and influence of other competing centres on shopping patterns across the study area.
- In Sections 6-8, we discuss the West London study centres in more detail, setting out the role of each centre within each authority and summarising their retail/leisure composition and the function they play. We also detail out of centre retail warehouse and foodstore provision.
- In Section 9, we benchmark the centres against a range of indicators to assess their relative position and role. This exercise produces a key baseline position to help understand the scale, position and retail offer in each centre, which informs our assessment of the potential impact of commitments.
- In Sections 10-11, we set out our baseline economic capacity projections for the West London study area, focusing in particular on the capacity for further retail floorspace within the study area, having regard to identified commitments and growth scenarios.
- In Section 12, we review the leisure sector, providing a qualitative review of existing provision and the need for additional facilities through gap analysis, quantitative forecasts and an analysis of survey results and current travel patterns.
- In Section 13, we set out our conclusions and recommended next steps.

1.13 The key findings and recommendations set out in this report draw on the following five volumes of appendices:

- **Volume 1:** This comprises various supporting plans and tables that illustrate and describe the key findings set out in this study. It also comprises our high level reviews of national and regional trends in the retail, ethnic and leisure sectors;
 - **Volume 2:** This sets out our more detailed descriptions of the vitality and viability of the twelve main centres in the three West London Boroughs, based on the key performance indicators set out in PPS6. It also comprises qualitative assessments of the relative role, offer and attraction of the smaller centres in the three Boroughs;
 - **Volume 3:** This provides the background information underpinning the centre assessments described in Volume 2 and analysed in Sections 6-9 of this study. It includes plans showing centre boundaries, the detailed centre audits and the retailer requirement datasets;
 - **Volume 4:** Sets out the full tabulations of the in-centre surveys conducted in the twelve main study centres; and
 - **Volume 5:** Comprises the full results of the household telephone interview surveys, including the detailed tabulations for each of the three West London Boroughs.
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- 1.14 The views expressed in this report are those of the consultants and do not necessarily represent those of the London Boroughs of Hounslow, Hammersmith & Fulham and Ealing.

2. NATIONAL POLICY FRAMEWORK

- 2.1 This section highlights and describes the key objectives and issues of National Planning Policy Guidance relevant to this study.
- 2.2 Planning Policy Statement 6 (PPS 6) entitled '*Planning for Town Centres*' was published in March 2006 and sets out the main issues and guidance relating to planning for the future of town centres and the main uses that relate to them. The Government has made it clear that the policies in PPS6 apply to the full range of town centre uses including retail, leisure, commercial and public offices, arts and tourism facilities, community facilities and housing as part of mixed-use multi-storey developments.
- 2.3 This guidance and its policies should be interpreted in the context of the Government's wider policy aims of promoting social inclusion, regenerating deprived areas, promoting economic growth, delivering more sustainable patterns of development and promoting good design, all of which are set out in PPS1.
- 2.4 PPS12 is also relevant, as it sets out the Government's policies on the preparation of local development documents which will comprise the Local Development Framework. It indicates that the statutory development plan documents will include a Core Strategy, site specific allocations and Area Action Plans.
- 2.5 PPS6 confirms that the Government's key objective is to promote vital and viable town centres by planning for their growth and focussing new development and a wide range of services within them. The Government's other objectives are to enhance consumer choice, support efficient, competitive and innovative retail and leisure sectors and to improve accessibility by a choice of means of transport.
- 2.6 The key points of relevance to the West London Study, are:-
- The need to take a more proactive approach to accommodating town centre uses in central locations, including where appropriate promotion of the expansion of town centres; and, conversely a realistic approach to the management of decline where justified; and
 - The need to establish a hierarchy of centres in each region and sub-region, with any change in the role and function of centres to be secured as part of the preparation of regional spatial strategies (RSS) and through preparation of the development plans, rather than through individual applications.

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- 2.7 Other points set out in PPS6 which are likely to be relevant to the West London study are:
- The need to assemble town centre and edge-of-centre sites for larger stores where need is identified, and to promote higher density, mixed-use multi-storey development;
 - The need to encourage a wider range of services and land uses for centres in decline;
 - The need to avoid over-concentration of growth in the highest level centres, and for regional spatial strategies to make clear strategic choices as to where growth is to be encouraged and decline managed;
 - The need to assess the quantitative need for additional floorspace for retail, leisure and office uses over the plan period and for five year periods within it, and the capacity of existing centres to accommodate additional development (in the case of long term strategic policy guidance, a longer term forecasting horizon is required);
 - The need to improve public transport to existing out-of-centre facilities, but not as a justification for their extension;
 - The need for development plans to set out the roles of different centres and explain how each centre will contribute to the local authority's overall vision for its area;
 - The need for development plans to encourage a diversification of uses in the town centre as a whole and to promote positive management of the evening economy, perhaps identifying distinct quarters where the evening economy is to be concentrated;
 - The need for development plans to include policies which guide the appropriate scale of development to be encouraged, setting upper limits for the scale of developments that will be allowed in different types of centres;
 - The need for plans to positively allocate sufficient sites within and at the edge of town centres so as to meet anticipated demand for the next five years, anticipating the use of CPO powers where needed; and
 - The need to promote a more balanced network of centres by strengthening local centres through preparation of local strategies to remedy deficiencies in local shopping.
- 2.8 In addition to PPS6, the creation of additional floorspace within buildings was brought under control in May 2006 following consultation on the ODPM's report: *'Planning Control of Mezzanine and Other Internal Floorspace Additions'* (March 2005). This was in response to concerns that the development of mezzanine floors in large retail stores significantly increased the available floorspace, thereby undermining the objectives of planning policy for the regeneration of town centres. The provision, incorporated within the 2004 Act does not seek to prevent such development, but to allow authorities to determine such proposals in the same way they would for external store expansion.
- 2.9 Changes to the Use Classes Order (UCO) also took effect on 21st April 2005. This was revised to enable local authorities to have more control over the management of town centre development and
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the potential proliferation of pubs, takeaways and night-clubs. The amended order seeks to ensure the scope of the use classes accurately reflect the impacts, and it is an outcome of this that there is more control over A3, A4, and A5 uses. Although cafés and restaurants have retained their Class A3 classification, pubs and bars are now reclassified under a new Class A4 and takeaways have been reclassified under a new and separate Class A5. Night-clubs have been reclassified as Sui Generis.

Summary

- 2.10 The central objective of PPS6 is to promote the vitality and viability of town centres by planning for their growth and development. Where development is not suitable, viable and/or available in town centre and/or edge-of-centre locations, then PPS6 promotes the expansion of existing town centre boundaries, where possible. This study will provide the baseline evidence to review centre boundaries in the next phase of work, which will necessarily focus on policy recommendations, town centre strategies and site allocations.
- 2.11 The three West London Authorities will also need to demonstrate a much more proactive approach to the planning and expansion of their main centres. PPS6 requires local planning authorities to plan for improvements to the range of services offered in local centres and to manage decline and change in any centres which can no longer realistically maintain their place in the retail hierarchy. This needs to be applied in the context of regional policy and at the local level by the three West London Authorities in their Local Development Frameworks (LDF's). In the context of PPS6 other work will need to follow on from this study, specifically the identification and allocation of development sites along with more detailed strategy and policy recommendations.

3. REGIONAL POLICY FRAMEWORK

- 3.1 In this Section, we review the regional policy position, and summarise the key components of each authorities local policy framework, including the current retail hierarchy definitions.

The London Plan, 2004

- 3.2 The London Plan is a strategic plan setting out an integrated social, economic and environmental framework for the future development of London in the next 15-20 years. It seeks to promote London as a World City and to maintain and enhance the competitiveness of business, including encouraging services, tourism, culture and the arts. It promotes urban regeneration particularly in areas requiring physical improvement, the enhancement of employment opportunities and seeks to maximise housing provision and to facilitate the development of efficient transport systems. Draft alterations to the Plan were published for consultation in September 2006.
- 3.3 The Plan adopts a policy of 'structured choice', which concentrates the supply of retail and leisure facilities and services in the most accessible places and spreads them between central London, town centres and development areas such as the Thames Gateway. Policy 3D.1 states that Boroughs should enhance access to goods and services and strengthen the wider role of town centres to:
- Encourage retail, leisure and other related uses in town centres and discourage them outside the town centres;
 - Improve access to town centres by public transport, cycling and walking;
 - Enhance the quality of retail and other consumer services in town centres;
 - Designate core areas primarily for shopping uses and secondary areas for shopping and other uses; and
 - Undertake regular town centre healthchecks.
- 3.4 London has a complex network of town centres and five broad types have been identified; international, metropolitan, major, district and local and neighbourhood.
- **International Centres:** London has two such centres, Knightsbridge and the West End. International Centres are defined as major concentrations of globally attractive, specialist or comparison shopping.
 - **Metropolitan Centres:** There are 10 metropolitan centres (although the draft alterations propose designating Uxbridge as an 11th centre). Two of these centres are in the West London Study Area: Ealing and Hounslow. Metropolitan centres are mainly in the suburbs and serve wide catchment areas covering several Boroughs and offer a high level and range of comparison shopping.
 - **Major Centres:** There are 35 major centres including Southall, Hammersmith, Fulham and Chiswick. They are characteristically important shopping and service centres with a Borough wide

catchment. Their attractiveness for retailing is derived from a mix of both comparison and convenience shopping.

- **District Centres:** London has 156 district centres. These include Acton, Greenford and Hanwell in the London Borough of Ealing; Shepherds Bush in the London Borough of Hammersmith & Fulham; and Feltham High Street and Brentford in the London Borough of Hounslow. District Centres have traditionally provided convenience goods and services for more local communities to meet their day-to-day needs. Developing the capacity of district centres for convenience shopping is critical to ensure access to goods and services at the local level, particularly for people without access to cars.

- 3.5 In accordance with national planning policy guidance, Policy 3D.2 states that UDP policies should assess retail capacity and need. Where need for additional development is established, capacity to accommodate such development should be identified within the UDP following a sequential approach. The Policy goes on to state that the scale of development should relate to the size and role of the centre and its catchment. Policy 3D.3 sets out that Boroughs should work with retailers and others to prevent the loss of retail facilities that provide essential convenience and specialist shopping.

West London Sub Regional Development Framework

- 3.6 The West London Sub-Region comprises the seven London boroughs of Hammersmith & Fulham, Brent, Ealing, Harrow, Hillingdon, Hounslow and Kensington and Chelsea. Its purpose, "in line with PPS12, is to provide guidance on the implementation of policies in the London Plan in order to help deliver a sustainable and prosperous future for the sub-region" (para.5.152 Further Alterations).
- 3.7 In May 2006 the Mayor published five Sub Regional Development Frameworks (SRDFs), and in September 2006 Further Alterations were produced with public consultation taking place between 28 September 2006 and 22 December 2006. In terms of timescales, the Further Alterations Examination in Public will take place in June 2007, and adoption and publication is expected in early 2008.
- 3.8 Amongst the strategic priorities for the West London sub-region, as set out in the Further Alterations (2006), is the objective to optimise the development of Opportunity Areas as set out in Policy 5F.3, including the realization of the potential of Wembley as a nationally and internationally significant sports, leisure and business location, co-ordinated with town centre regeneration and new housing. These centres and areas are set to experience significant development in the future. The scale of change means that the SRDF emphasises the need to co-ordinate the provision not only of new housing, but of transport infrastructure, jobs, schools and local shops, and new or enhanced green spaces.
- 3.9 The Further Alterations set out that the Mayor will work with partners to draw up planning frameworks for these areas, which should inform DPDs and broader regeneration and community strategies and initiatives. Taking account of other policies, developments will be expected to maximise residential and non-residential densities and to contain mixed uses. Given their scale, the documents states that they are also likely to give rise to substantial planning obligations.

- 3.10 The *Opportunity Areas* and set out in the Further Alterations SRDF are as follows:
- Heathrow (including Hayes, West Drayton, Southall, Feltham, Bedfont Lakes and Hounslow)
 - Park Royal/Willesden Junction
 - Wembley
 - White City (Table 5F.1, page 341)
- 3.11 Heathrow is the country's largest passenger and freight airport, and Terminal 5 will sustain it as one of the main economic drivers in West London. Directly and indirectly, the airport exerts a significant influence on surrounding local economies throughout the 'Western Wedge' and outside London. The SRDF states that there is a need for an overall planning framework which should establish the scale of opportunities and mix of development and seek to harness more of the benefits of wider cross-boundary growth for Londoners. This would focus on relevant parts of Ealing, Hillingdon and Hounslow, and some authorities are already preparing relevant DPDs which should be coordinated through the West London SRDF.
- 3.12 Park Royal (London Boroughs of Ealing, Hammersmith & Fulham and Brent) is closely associated with the longer term development potential at Willesden Junction and the railway lands, old industrial and vacant land south to Old Oak Common previously identified as an Intensification Area. Work on the planning framework dealing with the whole of this area has now commenced. The SRDF states that it will build on its potential to meet modern logistics and waste management requirements.
- 3.13 Wembley (London Borough of Brent) represents a nationally important Opportunity Area for leisure related development and the SRDF states that it is suitable for a regional casino. A planning framework has been prepared jointly by the Mayor and London Borough of Brent, which recognises its historic sporting and leisure associations and integrates the proposed new world-class stadium and other facilities, including the Arena and Conference Centre, with new leisure-related development. Public transport upgrades will contribute to the regeneration of Wembley as a town centre and to meeting sub-regional housing needs.
- 3.14 White City (discussed further in later sections) already has permission for significant new retail provision. The SRDF explains that it abuts a wider area where there is pressure and scope to intensify activity and protect and enhance the environment; and that development should be based on public transport rather than more intensive use of parking provision. A planning framework has been adopted as SPG by Hammersmith & Fulham, and the Mayor will work the local authority, Kensington and Chelsea and other partners to explore how this can be extended to realise and enhance the environmental and development capacity towards and including Wormwood Scrubs.
- 3.15 Town centres are focal points of the community in the West London sub-region. One of the key priorities of the London Plan is to strengthen the role and accessibility of town centres and to curb the threat that inappropriate out-of-centre development can create. Hounslow and Ealing are identified as Metropolitan Centres and it is noted that Shepherds Bush may become a major centre through planned growth.
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- 3.16 The strategy seeks to consolidate the role of the centres in West London and to ensure that they contain a wide range of uses and a diversity of activities. Overall, the ability of the sub-region's town centres to improve their image and attractiveness is considered vital for the sustainable growth of West London.
- 3.17 The Further Alterations state that West London is expected to experience significant growth in consumer expenditure which could generate demand for 145,000 to 227,000 sq m extra comparison goods floorspace to 2016. The study states that this should be concentrated in town centres, but strategically designated town centres in the sub-region should be considered as opportunities for more intensive development and boroughs should consider how their roles could be consolidated or enhanced to meet retail and other consumer needs.
- 3.18 The SRDF and Further Alterations provide guidance on developing a wider role for Uxbridge as a Metropolitan Centre, of better integrating Ealing Broadway / West Ealing and Shepherd's Bush/White City and of regenerating Wembley. The document states that redevelopment associated with Hounslow's Western International Market should not compromise capacity for expansion of the wholesaling function in the longer term.

GLA Floorspace Needs in London

- 3.19 This sub-section briefly reviews and comments on the town centre and floorspace needs assessment undertaken by the Greater London Authority (GLA). We highlight the key baseline assumptions and findings in relation to the three West London Authorities, specifically in terms of turnover and capacity for new floorspace. We also explain why, in the context of PPS6, this Sub-Regional Retail Study is required to inform policy formulation and the decision making process within the three West London Borough areas.

Comparison Goods 2004

- 3.20 Experian Business Strategies were appointed by the GLA to develop a comprehensive picture of current and future comparison goods floorspace needs throughout London. The report has two main outputs:
- Stage one is the base or "do nothing" scenario for the period 2001 to 2016. It sets out a broad strategic region-wide assessment of floorspace need, providing the context for more local studies to be undertaken by individual Boroughs; and.
 - Stage two is the "future proposals" scenario. It follows the same baseline methodology as stage one, but models the impact of all significant retail proposals (identified at that time) across London up to 2016.
- 3.21 The stage one base scenario provides turnover estimates for each of the London Boroughs in 2001 and 2016. It then seeks to identify the net balance of trade of each Borough and the extent to which it is losing or gaining comparison goods expenditure. For the three West London Authorities the report indicates that:-

- **London Borough of Ealing** - had a population of 308,072 in 2001, with an annual comparison goods expenditure of £773.4m. Experian estimates that £207.8m will be retained within the Borough (27%) and £565.6m (73%) will be lost as leakage to other shopping destinations by 2016.
- **London Borough of Hammersmith & Fulham** - had a population of 169,851 in 2001, with an annual comparison goods expenditure of £434.6m. Experian estimates that £64.2m will be retained within the Borough (15%) and £370.4m (85%) will be lost as leakage to other shopping destinations by 2016.
- **London Borough of Hounslow** - had a population of 216,445 in 2001, with an annual comparison goods expenditure of £469.2m. Experian estimates that £155.3m will be retained within the Borough (33%) and £313.9m (67%) will be lost as leakage to other shopping destinations by 2016.

3.22 Experian estimate the amount of comparison goods trade attracted into each Borough, which is then used to determine the overall balance of trade. This is the net difference between spend taking place in each Borough and spend that is lost to elsewhere. The negative figure indicates that more spend is leaving the Borough than takes place within it. The 'inflow' and trade balance for each of the three West London Authorities was estimated to be as follows:

- Ealing -£161.8m
- Hammersmith & Fulham -£109.6m
- Hounslow £117.9

3.23 The study illustrates the potential impact of all significant retail proposals across London. These included Elephant & Castle, White City, Wembley, Kings Cross, Kingston, Brent Cross, Stratford and Canary Wharf. The study highlighted the fact that the forecast need for new floorspace, over and above major projects already in the pipeline, is very sensitive to assumptions made about retail space productivity growth and sales densities. At one extreme there is an estimated requirement of an additional 2 million sq m and at the other extreme a requirement for 0.3 million sq m.

3.24 For the three West London Boroughs the forecast capacity for new comparison goods floorspace in 2016 (based on 2.5% productivity growth and £5,000 per sq m average sales density) was as follows:

- **LB of Ealing:** 13,619 sq m net;
- **LB of Hammersmith & Fulham:** 5,085 sq m net; and
- **LB of Hounslow:** 19,699 sq m net.

3.25 The Experian analysis does provide useful baseline data indicating population change and comparison goods expenditure and growth projections on a London-wide base, and for individual sub-regions and smaller areas. The study is also helpful in understanding the scale and implications of major schemes in the pipeline. Significantly, however, the report focuses solely on quantitative considerations and has little regard to the issue of quality. There is also little consideration at a local level of how old and obsolete space can be recycled to accommodate modern retailer formats that are able to meet shopper/retailer needs.

- 3.26 In contrast, the West London Retail Study takes into consideration the over and under-performance of retail destinations through the results of the Household Telephone Survey. Unlike the Experian gravity model, the baseline evidence and assumptions underpinning the West London Study are based to a large extent on our assessments of the quality, role and function of the main study centres, informed by the results of the household and in-centre surveys. The incorporation of commitments into our quantitative model (discussed in later sections) has also been informed by our more detailed understanding of the composition of schemes, distribution, accessibility, the health of the current network of centres and the consequent impact on those centres. Our manual model has therefore been specifically developed to ensure quantitative, qualitative and accessibility considerations can all be taken into account.
- 3.27 This detailed approach was not possible for the GLA Study, because it was more strategic in nature. While Experian's sensitivity analysis does highlight a range of possible requirements across London at a strategic level, it does not provide the detailed evidence needed by local planning authorities for the preparation of UDP/LDF policies, or to guide specific allocations of new comparison floorspace development. This retail study has consequently been commissioned by the three West London Authorities to ensure a focused qualitative and quantitative assessment at a more localised level, in order to feed into informed sensitivity testing and, eventually, recommendations for development at the local level.

Convenience Goods 2005

- 3.28 The GLA subsequently appointed Experian to undertake an assessment of current and future convenience goods floorspace needs throughout London. According to Experian:

"The intention of the commission was to produce estimates of greater use to Boroughs in preparing the Unitary Development Plans/Local Development Documents; to provide greater geographical sensitivity for the sub-regional development frameworks (SRDF) and to improve understanding of linkages between London and its wider region."

- 3.29 As for the comparison goods assessment, Stage 1 of the report sets out baseline consumer expenditure estimates, shopping patterns and total available expenditure estimates. Stage 2 introduces sensitivity testing based on variations in floorspace efficiency, and outlining future capacity scenarios. In terms of population and expenditure, the study identifies the following projections for the three authorities:
- **Ealing:** Assuming a population of 308,872 in 2001, the study identifies total available convenience goods expenditure in the Borough of £487.3m. This is forecast to grow to £630.6m by 2016.
 - **Hammersmith & Fulham:** Based on a population of 169,851 in 2001, the study identifies total available convenience goods expenditure in the Borough of £267.3m. This is forecast to grow to £349.5m.
 - **Hounslow:** Assuming a population of 216,445 in 2001, the study identifies total available convenience goods expenditure in the Borough of £303.0m. This is forecast to grow to £399.3m.

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- 3.30 In terms of trade retention and leakage, the study estimates the following:
- **Ealing:** Trade retention of £197.8m (40.6%) / Trade Leakage of £289.5m (59.4%);
 - **Hammersmith & Fulham:** Trade retention of £84.4m (31.6%) / Trade Leakage of £182.9m (68.4%);
 - **Hounslow:** Trade retention of £164.3m (54.2%) / Trade Leakage of £138.7m (45.8%).
- 3.31 Taking into account the inflow of convenience goods expenditure into each Borough, the study calculates the overall balance of trade. This is the net difference between spend taking place in each Borough and spend that is lost to elsewhere. Like comparison goods, the negative figure indicates that more spend is leaving the Borough than takes place within it. Experian estimates that by 2016 the balance of trade for each Borough is as follows:
- **Ealing:** -£6.0m
 - **Hammersmith & Fulham:** £74.3m
 - **Hounslow:** £329m
- 3.32 Although a greater amount of spend is identified as leaving the London Borough of Ealing than is taking place within it, there still remains sufficient expenditure to support additional floorspace.
- 3.33 The Experian study converts expenditure capacity to space requirements using two scenarios. The first assumes that all additional space will be satisfied by opening new supermarkets trading at an average sales density of £5,500 per sq m net. The second scenario assumes the equivalent for superstores, trading at a higher average sales density of £9,400 sq m net.
- 3.34 The base scenario assumes no new convenience goods floorspace developments in or around Greater London between 2001 and 2016. The capacity forecasts based on different rates of annual productivity growth (i.e. growth allowance for existing floorspace) for each Borough are as follows:
- **LB of Ealing:** Based on a 0.15% annual productivity growth rate, the study estimates the capacity for 10,155 sq m net of new convenience goods floorspace by 2016. Using higher productivity growth rates of 0.5% and 1% per annum the forecast capacity falls to 6,340 sq m net and 1,246 sq m net respectively.
 - **LB of Hammersmith & Fulham:** the equivalent capacity forecasts are 9,800 sq m net, 6,620 sq m net and 2,374 sq m net respectively.
 - **LB of Hounslow:** the forecast capacity is 15,998 sq m net, 10,819 sq m net and 3,903 sq m net.
- 3.35 The Experian 'timeline' analysis incorporates the effect of current proposals/commitments on the baseline capacity figures outlined above. A number of developments are taken into account, which are derived from published sources that we understand have been verified with individual Boroughs. Our Economic Capacity Projections set out in Section 10 and 11 provide an up-to-date overview of current commitments agreed with each of the three West London Authorities. It is evident from the list below
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(based on Appendix 5 of the GLA Study), that this is now out-of-date and our update within this study is clearly justified:-

- **Ealing:** West Ealing Waitrose 4,945 sq m¹
Ruislip Road Lidl 1,402 sq m
- **Hammersmith & Fulham:** White City 4,105 sq m
Sainsbury's Extension 2,484 sq m
- **Hounslow:** Feltham Town Centre Redevelopment 7,446 sq m
Brentford Town Centre Redevelopment 3,934 sq m
Tesco Extension, Bulls Bridge 1,504 sq m
Tesco Extension, Mogden Lane 1,504 sq m
Tesco Extension, Dukes Green 1,327 sq m
Tesco Extension, Syon Lane 1,284 sq m
Aldi, Hospital Road 1,271 sq m

3.36 Incorporating these commitments, the analysis outlines capacity for additional convenience goods floorspace in each Borough by 2016. Based on Scenario 1 (assuming a supermarket sales density of £5,500 per sq m net and a 0.5% per annum productivity growth), the study identifies a significant deficiency in capacity for Ealing (-8,592 sq m net), Hammersmith & Fulham (-8,883 sq m net) and Hounslow (-41,867 sq m net).

3.37 The study confirms that the space requirements identified are very sensitive to qualitative factors that have not been applied (such as overtrading and under trading, the quality of the retail offer and accessibility) and states the local retail needs assessments must take account of such factors. The study adds that this is particularly important for assessments of convenience goods, because catchment areas are more localised than for comparison goods and therefore changes to nearby centres have a relatively greater effect.

3.38 The requirement for needs assessments to be carried out at a more detailed sub-regional and local level is therefore necessary for the following main reasons:

- First, contrary to best practice, the GLA study is not based on up to date survey data to underpin the analysis and a large number of broad assumptions and judgements have been used.
- Second, none of the baseline turnover estimates or assumptions included in the Experian analysis have been corroborated by any on the ground qualitative assessment. Specifically, no qualitative assessment has been made of the adequacy or otherwise of existing convenience facilities and their ability to accommodate current sales levels or forecast growth in floorspace productivity.
- Third, no assessment has been made of the appropriateness of the current network and sustainability of current expenditure patterns. There is also no consideration of any quantitative or qualitative gaps in the existing network of centres. In effect, instead of examining the quantitative and qualitative needs of individual centres and Boroughs, the exercise provides a relatively crude and imprecise impact assessment of current proposals and commitments.

Summary

- 3.39 The London Plan sets out an integrated social, economic and environmental framework for the future development of London over the next 15-20 years. Within the London Retail Hierarchy, Ealing and Hounslow are identified as Metropolitan Centres; Southall, Hammersmith, Fulham and Chiswick are Major Centres; and Acton, Greenford, Hanwell, Shepherds Bush, Feltham High Street and Brentford are District Centres.
- 3.40 The West London Authorities lie within the West London Sub-Region which comprises a number of *Opportunity Areas* and an *Area for Intensification* identified by The London Plan. Some of these are within the London Boroughs of Ealing, Hounslow, and Hammersmith & Fulham. The SRDF anticipates that Metropolitan Centres will experience the most significant growth, particularly for comparison goods floorspace, but explains that Boroughs may wish to consider the scope for seeking to distribute growth to smaller and middle tier centres.
- 3.41 The GLA '*London Wide Comparison and Convenience Goods Floorspace Needs Assessment*' identified the net difference between spend taking place in the Boroughs and spend that is lost to other centres and facilities elsewhere. This takes into account inflow and outflow, with a negative figure indicating that more spend is leaving the Borough than takes place within it.
- 3.42 By 2016, the GLA Study identifies a comparison goods trade balance of -£161.8m in Ealing; -£109.6, in Hammersmith & Fulham; and £117.9m in Hounslow. In terms of convenience goods, the trade balance is -£6m in Ealing; £74m in Hammersmith & Fulham; and £329m in Hounslow.
- 3.43 The GLA study developed a range of strategic capacity projections based on different scenarios. In accordance with national guidance and GLA recommendations, the three West London Authorities have jointly commissioned this more detailed sub-regional Retail Study to help inform their policy making and decision-making process at the local level over the forthcoming LDF period.

¹ NB – The net addition to the original Waitrose store was 1,645 sqm resulting in a total floorspace of 4,945 sqm

4. LOCAL POLICY FRAMEWORK

- 4.1 This section summarises the key components of each authorities local policy framework, including the current retail hierarchy definitions. A full and detailed schedule of retail and town centre policies, and the adopted retail hierarchy from each Borough's UDP is attached in Appendices 1-3. For the purpose of this Study, the London Borough of Hammersmith & Fulham also requested that we review an alternative set of smaller centres, as they are looking to propose options to modify the hierarchy of smaller centres in the Borough.

Ealing UDP (Adopted 2004)

- 4.2 Ealing's retail hierarchy consists of Ealing metropolitan centre, Southall major centre, Acton, Greenford and Hanwell District Centres and nine neighbourhood centres.
- 4.3 Overall, the UDP seeks to maintain and where necessary improve the function, character, vitality and viability of the Borough's hierarchy of centres in accordance with their roles as metropolitan, major, district and neighbourhood centres. The UDP notes that all of the identified town centres are unique but that they all play an important role contributing to the economic and social well being of the Borough's local communities.
- 4.4 The UDP highlights the need to ensure that town centres are maintained and regenerated to remain attractive. Town Centre strategies have been prepared for those centres which require a clear statement of how competitiveness can be maintained and regenerated. The UDP identifies that Ealing town centre has achieved significant growth in recent years which the Council will maintain, and that Southall town centre is growing in significance as a centre for Asian retailing.
- 4.5 Policies deal specifically with the sequential approach, retail frontages, local shops, eating, drinking and entertainment uses, markets and other shopping centre uses. The plan also identifies sites for growth and provides guidance on the appropriate range of uses and the scale of development.

Hammersmith & Fulham UDP (Adopted August 2003)

- 4.6 Shopping provision in the Borough of Hammersmith and Fulham consists of the three town centres of Hammersmith, Fulham and Shepherds Bush and nineteen key local shopping centres and a number of smaller shopping parades and individual shops.
- 4.7 The plan aims to ensure that there is an adequate range of convenient and environmentally sustainable shopping facilities available to all communities in the Borough. The plan states that the Council will seek to regenerate the town centres of Hammersmith, Fulham and Shepherds Bush to enhance their vitality and viability whilst ensuring that there is a network of smaller centres to complement the range of goods and services provided in the main town centres.

- 4.8 In general the plan supports proposals for the extension or improvement of retail premises and directs major developments to the three main town centres. The plan notes that Shepherds Bush's role will be enhanced, as a result of the White City development and that Fulham Broadway will benefit from new development. The plan does not envisage a major increase in retail floorspace in Hammersmith. It is also highlighted that there is pressure for out-of-centre retail development within the Borough but that development of this sort will be resisted in accordance with national policy advice.
- 4.9 The plan sets out specific policies to deal with the proportion of A1 floorspace within designated retail frontages, extensions and improvements to town centres, accessibility and car parking, the evening economy, food and drink uses, temporary markets and other town centre uses. There are also specific policies that are important for each of the main town centres including:
- Hammersmith – preferred location for major office development.
 - Hammersmith – retain market in Lyric Square.
 - Fulham – retention of street market.
 - Shepherds Bush – retention of market.

Hounslow UDP (December 2003)

- 4.10 The retail hierarchy in the London Borough of Hounslow consists of the metropolitan centre of Hounslow, the major centre of Chiswick, the district centres of Brentford and Feltham and various major and minor neighbourhood centres and key local parades.
- 4.11 The UDP recognises the need to encourage the regeneration/enhancement of Brentford, Chiswick, Feltham and Hounslow in order to enhance existing centres, to maximise opportunities for jobs and services and to contribute towards sustainable development. The Council has prepared Town Centre Strategies/Action Plans to assist with this. Some of the key aims for each of the Borough's main town centres are outlined below:
- **Brentford** – to consolidate and enhance the centre's retail role.
 - **Hounslow** – to attract major investment, promote mixed-use development and promote the centre as a major retail destination.
 - **Feltham** – to promote comprehensive redevelopment of the town centre core, specifically 'The Centre' Shopping Centre.
 - **Chiswick** – to maintain and improve as a major and local shopping centre, improving the range and quality of the retail offer and ensuring an appropriate mix of uses.
- 4.12 The Council's retail policy aims to ensure that the existing town and local shopping parades remain the focus for shopping and other town centre related uses, such that people have the choice of local, convenient and accessible shopping facilities. The plan contains specific policies on the main shopping areas, non-retail uses in primary and secondary frontages and local shopping centres, new retail

development, environmental improvements to shopping areas, shopfront design, advertisements and access to shopping facilities.

Summary

- 4.13 The UDPs for the London Boroughs of Ealing, Hammersmith & Fulham and Hounslow set out a clear hierarchy of centres within each borough. Overall, the UDPs follow national and regional policy advice and seek to strengthen their main town centres by providing a range of uses in attractive town centre environments. The UDPs also highlights the need to ensure that there are adequate local shopping facilities to serve the everyday retail and service needs of local communities.

5. COMPETING CENTRES

- 5.1 This section examines the relationship of West London with the wider sub-region. In particular it describes the influence of key competing neighbouring strategic centres on the current and future role of the West London centres. Major commitments and proposals within the three West London Authorities are discussed in later sections. Our detailed analysis of each centre and comparison between them is set out in Appendices 4-6 in the first technical background paper. The key conclusions and themes are drawn out in this section.
- 5.2 This review draws extensively on the household telephone survey data that underpins the whole study. We also refer to a number of other in-house datasets and sources (including PROMIS, Javelin VenueScore Ranking, Focus Property Intelligence Database and the EGi dataset).
- 5.3 We have also worked in partnership with each of the local authorities to identify and clarify the position regarding development in the pipeline and proposals. Our assessment of each of the competing centres identifies the main retail offer and the extent to which this is likely to change and influence shopping patterns in West London in the future.

The Study Area

- 5.4 In order to understand the role, function and attraction of the West London centres and their interaction with the rest of the region, we have necessarily defined a study area that extends beyond the three West London Borough boundaries. In order to define an appropriate survey area, we have first referred to previous survey work. We have also considered each local authority boundary in relation to a number of key factors, including the influence of the existing retail hierarchy, the adjoining catchment population/urban areas, out-of-centre retail provision and competing centres in the wider area.
- 5.5 In discussion with the client group, a study area was defined for the purposes of commissioning the household survey. This area was further divided into thirty sub-zones as a means of measuring current shopping/leisure patterns within the study area as a whole and between the West London centres. This approach provides a robust review of shopping patterns at the local level, particularly focusing on food and non-food shopping.
- 5.6 Within this area a household telephone survey of 3,000 households was undertaken. Respondents were asked questions relating to food and non-food shopping, as well as leisure trips, modes of transport and qualitative “likes” and “dislikes”. The survey area and zones identified are illustrated on Plan 1 (Volume 1).

Identification of Competing Centres

- 5.7 The shopping patterns derived from the Household Telephone Survey have enabled us to identify the main competing centres in the West London survey area and calculate the amount of comparison goods

expenditure that each competing centre draws from this area. As well as strength of retail offer, this indicator reflects accessibility and distance from the West London catchment area.

- 5.8 The amount of comparison goods expenditure leading to competing centres from Zones 1-30 is highlighted in Table 5.1 (also refer to Tables 4.3-4.4 of Appendix 5 and Plans 4-5 in the first technical background paper. We describe the influence of competing strategic centres, based on this survey data, in the remainder of this section.

Table 5.1: West London Competing Centres - Sub-Regional Context

| Centre | Comparison Goods Trade Draw from Catchment Area (£000) | % of Total Available Comparison Goods Expenditure (%) |
|------------------------|--|---|
| West End | 467,043 | 8.9 |
| Kingston | 382,455 | 7.3 |
| Ealing | 372,413 | 7.1 |
| Kensington | 269,169 | 5.2 |
| Hammersmith | 230,843 | 4.4 |
| Hounslow | 202,072 | 3.9 |
| Richmond | 190,409 | 3.6 |
| Chelsea | 164,716 | 3.2 |
| Brent Cross | 150,683 | 2.9 |
| Harrow | 135,905 | 2.6 |
| Uxbridge | 112,780 | 2.2 |
| Staines | 112,353 | 2.2 |
| Chiswick | 112,039 | 2.2 |
| Fulham | 82,363 | 1.6 |
| Shepherd's Bush | 62,333 | 1.2 |
| Southall | 26,037 | 0.5 |
| SUB-TOTAL: | 3,073,612 | 59 |
| TOTAL: | 5,219,750 | 100 |

Source: West London Household Telephone Survey, September 2006

- 5.9 The table shows that the West End draws the highest proportion of trade (8.9%) from the study area, equivalent to £467m. This reflects not only the critical mass and quality of the retail offer in the West End, but also the fact that it is easily accessible to residents in the West End, with a significant proportion also working in Central London.
- 5.10 Kingston is a Metropolitan Centre on the edge of the survey area and within relatively close proximity to the three West London Authorities. It also attracts a high proportion of comparison trade from the study area (£382m), higher than for Ealing town centre (£372m). This illustrates the strength of Kingston's retail offer and its significant influence on shopping patterns in the West London study area.
- 5.11 Of the other centres Kensington has a strong trade draw (£269m), followed by Hammersmith (£230m) and Hounslow (£202m). Like Kensington, Richmond and Chelsea are located within the survey area

and also have a strong trade draw pattern – almost as much as Hammersmith and Hounslow which fall further inside Zones 1-30.

- 5.12 Those centres located outside the survey area, but which have a strong influence over shopping patterns in West London, include Brent Cross, Harrow, Uxbridge and Staines.
- 5.13 Collectively, the 16 main centres highlighted in Table 5.1 draw 59% of total available comparison goods expenditure from within the West London survey area. The remaining 41% is directed towards the other five main centres in the three West London Boroughs, along with the smaller local shopping centres and out-of-centre facilities. Other centres outside the survey area (such as Putney, Wandsworth, Wembley, Hayes, Watford, Wimbledon, Notting Hill, Kilburn, Clapham, Twickenham and Croydon) and out-of-centre stores also draw a small proportion of comparison goods spend from the defined survey area.
- 5.14 From our experience of carrying out similar studies for local planning authorities in the UK and South East, these trade patterns and the level of trade retention is not unusual, particularly given the dense network of centres within a heavily populated urban area. Each of these competing retail destinations and any planned/proposed improvements to their retail and leisure offer should, however, be viewed as potential challenges to the performance of the main centres in the three West London Authorities over the forthcoming LDF period. We review and assess the extent of these challenges and threats below.

Profile of Competing Centres

- 5.15 In order to assess the scale, quality and attraction of the main competing centres identified above, we have carried out a high level assessment of some of their key performance indicators (KPIs) as set out in the tables to Appendix 5. We highlight some of the key findings below.

Centre Ranking

- 5.16 The national ranking of each of the competing centres has been derived from Javelin (Venue Score). This vitality ranking assesses the retail offer of each shopping destination using a scoring system that takes account of the presence in each location of multiple retailers (including anchor stores, fashion operators and non-fashion multiples). The score attributed to each operator is weighted to reflect their overall impact on shopping patterns. For example, centres that have significant anchor stores (such as John Lewis, Marks & Spencer and Debenhams) receive a higher weighted score than other unit stores.
- 5.17 It is evident from Appendix 5 that Kingston (16th) and the West End (11th) have the highest national rank position, which reflects their strength as shopping destinations. Given their current influence on the three West London Authorities, these centres represent significant competition to the West London centres for shoppers and their spend.
- 5.18 Uxbridge (85th) is ranked third of the West London competing centres, followed by Ealing (100th), Chelsea/Kings Road (107th), Kensington High St (113th), Richmond (116th) and Staines and Harrow (both ranked 120th). In comparison, Hammersmith and Hounslow have lower rank positions of 149th and 165th respectively.

- 5.19 The significant number of centres in West London achieving positions within the top 150 ranking highlights the significant overlapping catchments and dense network of strong competing centres in the sub-region. It also illustrates the extent of the competition and potential threats to the future vitality and viability of the West London study centres.

Retail Floorspace

- 5.20 In terms of their total gross retail floorspace (see Table 4.2, Appendix 5), the West End is the dominant centre with a retail floorspace of circa 482,000 sq m gross. In contrast, Kingston has a retail floorspace figure of 130,000 sq m gross and is slightly larger than Ealing (116,228 sq m gross). However, the strong performance of Kingston against each of the key performance indicators highlights the relative under-performance of Ealing's retail offer. Hounslow, the other Metropolitan Centre in the three West London Authorities, has a floorspace of 76,868 sq m gross, and Hammersmith has a floorspace of circa 59,080.

Prime Zone A Rental Levels and Yields

- 5.21 Tables 4.6 of Appendix 5 shows that the West End and Kingston are achieving the highest Prime Zone A rental levels of £5,380 per sq m and £3,174 per sq m respectively.
- 5.22 Ealing and Hammersmith are estimated to be achieving Prime Zone A rental levels of c.£1,991 per sq m net and £1,829 per sq m net respectively, whereas Hounslow's rental levels are significantly lower at c.£1,076 per sq m. In comparison, Chiswick is ranked below Hounslow in the retail hierarchy, but is achieving a higher rental level (as are Staines and Harrow). Similarly Richmond, Uxbridge, Kensington High Street and the King's Road are all achieving higher rents than the main West London centres.
- 5.23 The lower rental levels in the three main study centres, but specifically Hounslow, broadly reflect the scale and quality of their retail offer. It also reflects a number of other key factors that combine to drive rental levels and growth. For example, due to a lack of recent development, these centres may (to varying degrees) have a limited supply of available large shop units in their primary shopping areas that match the requirements of modern retailers (see Appendix 18 for a summary of trends in the retail sector). On the other hand, retailer requirements for representation in these centres may be limited due to the competition from other centres in the West London region. We examine these issues in more detail throughout this study.

Prime Retail Yields

- 5.24 In terms of Prime Yields, Table 4.5 of Appendix 5 shows that the West End and Kingston are achieving yields of 5% and 4.25% respectively. In comparison, Ealing has an estimated yield of c.6-7%, Hammersmith's is c.9% and Hounslow's is estimated to be higher at c.9.5%. These figures reflect weak investor confidence in the centres and demonstrate the stronger interest in and development potential of the key competing centres.

Retailer Requirements

- 5.25 Retailer demand for space in the key competing centres also reflects the strength of competition facing the key West London centres. Table 4.7 of Appendix 5 shows, for example, that Kingston and the West End have the strongest retailer requirements (177 and 189 businesses respectively). This reflects their relative strength as retail locations in the London and West London network of centres.
- 5.26 In comparison, Hammersmith (49 requirements), Chiswick (49), Ealing (48) and Hounslow (45) are all ranked behind the other main competing centres identified in terms of the current level of retailer requirements.
- 5.27 Although the list of retailer requirements represents a relatively good snapshot of market interest in centres at any one point in time, they can be misleading. For example, new planned or proposed retail development in centres will generally lead to an increase in market interest, particularly where strong anchor stores have been secured. Also, the number of requirements set out in Table 4.7 of Appendix 5 do not differentiate between the quality of retailers and leisure operators seeking representation in the main centres.

Future Challenges to the West London Centres

- 5.28 In terms of future challenges to the vitality and viability of the study centres in the three West London Authority area, there are a number of competing centres that have developments or proposals in the pipeline which will enhance their town centre offer and potentially erode the market share of the West London centres in a “do-nothing” scenario. The major developments and proposals are highlighted below:
- **Kingston town centre** - a mixed town centre retail, leisure and housing development, ‘Charter Quay’, has attracted Borders and Starbucks as well as a number of bar/restaurant operators to the town including Casa, Ha Ha Bar and Cartuccio’s. The Rotunda, a 14,000 sq m leisure scheme also opened at the end of 2002 and comprises an Odeon Multiplex, a Megabowl, a David Lloyd health & fitness club, Pizza Express and Old Orleans restaurant. The first floor of the Bentall Centre in Kingston was recently reconfigured to create a large store for Zara. While there are no further major retail schemes at an advanced stage in the development for Kingston at present, the Council is in the process of preparing a new strategy known as ‘K+20’. This is expected to identify a number of development opportunities across Kingston and we understand that Hammerson is working alongside the Council on several key town centre sites.
 - **Uxbridge town centre** - the only scheme in the pipeline that we have been made aware of is an extension to the anchor Sainsbury’s foodstore.
 - **Harrow town centre** - We are not aware of any major developments in the pipeline. For several years, the Council has identified the site of the former Post Office and depot on College Road as suitable for a major redevelopment project, possibly also including the adjoining Harrow-on-the-Hill station. We understand that a planning application has been submitted for a mixed use redevelopment of the Post Office.

- **Kensington High Street** - the two most recent completions include a large unit now occupied by PC World on the site of the former Kensington Market. On the north side of the street the retail space at 116-138 has been reconfigured to provide large retail units. Adjacent to PC World, permission has been granted at 37-45 Kensington High Street for a redevelopment to provide modern retail floorspace and offices behind the current façade.
- **Staines town centre** - the second phase of refurbishment of the Elmsleigh Centre is scheduled to commence involving reconfiguration and the creation of a new store for Bhs, as well as improvements to the food court.
- **Kings Road** - The most recent scheme was on the south side of Sloane Square where the building at 34-39 Sloane Square, formerly occupied by WH Smith and Natwest Bank, has been refurbished as one large unit occupied by a Boss flagship store in Spring 2006. We are not aware of any further schemes either planned or in the pipeline.
- **Richmond town centre** – new development and provision in the town is constrained by its historic and protected built environment. However, a recent Retail Study undertaken by GVA Grimley on behalf of the Council did identify a number of development opportunity sites, including the site around the railway station. An application has yet to be submitted, but the Council has prepared a Development Brief for the site which aims to bring about an improvement in the public transport interchange facilities as well as some new commercial development.

Town Centre & Retail Studies: Neighbouring Authorities

- 5.29 We have undertaken a broad review of Retail Studies undertaken in the neighbouring authorities of Hillingdon, Brent and Harrow.
- 5.30 Uxbridge is the principal centre in Hillingdon, and the Hillingdon Town Centres and Retail Study is scheduled for publication in March/April 2007. Hillingdon Council Officers undertook all background research and handed this over to consultants to produce the Study and gravity model to review the capacity for additional floorspace. The study has identified capacity for 17,338 sq m net of comparison floorspace, and 450 sq m net for convenience floorspace. Whilst the Study did not review site availability, it is evident from discussions with the Council that comparison goods floorspace will be directed into Uxbridge in the first instance. The detailed findings will be available by the end of April 2007.
- 5.31 The London Borough of Brent published the Borough-wide Retail Need & Capacity Study in February 2006. The aims were to identify the demand and capacity for new floorspace, and to focus more specifically on the retail capacity for Wembley town centre and a strategy for Wembley. The Study was informed by health checks, a shopper telephone survey, and in-centre surveys in Wembley, Willesden and Harlesden. The Study identified capacity for 58,000 sq m of comparison retail floorspace by 2015. In reality, they state that this will be reduced to 34,000 sq m net following the implementation of the Brent Cross extension. The analysis divides this capacity between Wembley (14,000 – 16,000 sq m), Kilburn (9,000 -11,000 sq m), and the remaining 8,000 sq m between the larger District Centres of Cricklewood, Harlesden, Kingsbury, Willesden and Burnt Oak.
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- 5.32 In terms of convenience goods, the Study identifies capacity for 7,500 sq m net of additional floorspace. They state that this figure is not affected by Brent Cross because food shopping tends to be more localised within the Borough. They conclude that convenience goods capacity should be split between Wembley, Cricklewood, Kingsbury, Harlesden and Neasden.
- 5.33 The London Borough of Harrow commissioned consultants in April 2005 to undertake a borough-wide Retail Study, which was published in March 2006. Like the other Boroughs they undertook health checks and a household telephone survey, and the overall study focused principally on Harrow town centre. The Retail Study identified substantial need for convenience goods floorspace in the Borough, forecasting sufficient expenditure during the period to 2016 to support an additional food superstore in or on the edge of Harrow town centre, together with up to two new food superstores elsewhere in the Borough.
- 5.34 If Harrow Borough is able to maintain market share, the study identifies need for about 13,400 sq m net sales area of additional comparison goods floorspace in the town centre by 2011, rising to about 29,100 sq net by 2016. They conclude that the latter scale of growth would be sufficient for a substantial scheme anchored by a replacement Debenhams department store, together with substantial new comparison goods floorspace in more incremental development elsewhere in the town centre, within the LDF period to 2016. They identify only one major site that could realistically be capable of accommodating growth in comparison goods shop floorspace on the scale identified: Greenhill Way car park, and Debenhams and Littlewoods stores. The Havelock Place area is another area of opportunity for new comparison goods shopping development in the retail core of the town centre and immediately adjacent to the prime retail area.

Summary

- 5.35 The results of the shopper surveys have identified Kingston, the West End, Uxbridge, Staines, Harrow, Richmond, Kensington High Street, Brent Cross and Kings Road as competing for shoppers and spend in the defined West London study area.
- 5.36 It is clear that the West End and Kingston have the most significant influence on shopping patterns in the defined study area and are achieving a significant draw of shoppers and spend. This reflects the relative critical mass and quality of their retail offer. This is underlined by their strong Prime Zone rents, their national rankings as shopping destinations and the level of market interest and confidence in their future vitality and viability.
- 5.37 The key performance indicators considered show that Ealing is ahead of many competing centres, as would be expected for a Metropolitan Centre. However, Hounslow is ranked behind a number of competing centres, despite its metropolitan centre status, and Hammersmith is also out-performing Hounslow on some of the KPIs.
- 5.38 The survey results and KPIs also indicate that the Kings Road, Brent Cross and Richmond provide either a quality/niche retail offer for residents in the West London area, or function as destination/day-out shopping locations. The scale, quality and relatively unique offer of these three shopping locations

means that they will continue to represent significant attractions to residents in the three West London authority areas.

- 5.39 Uxbridge, Staines and Harrow function as more mainstream third tier centres. Although they offer less competition to the main West London Centres, Table 5.1 shows that they are achieving a market share of available spend within the defined study area. Nevertheless, there are few major planned retail developments and/or proposals being promoted in these centres. Therefore, through effective strategies and the identification of key development opportunities, it should be possible for the larger centres in the three West London Boroughs to strengthen the scale and quality of their retail offer, thereby providing greater competition to centres such as Kingston, Uxbridge and Staines in the future.
- 5.40 Our review of recent new developments, future commitments and proposals has highlighted the fact that centres in the three West London Authorities face strong and increasing competition from centres in neighbouring authorities and the wider West London area, both in terms of the scale and quality of the competing retail and leisure offer. The future challenges to the West London centres will be further intensified by the proposals to extend Brent Cross Shopping Centre, as part of the wider Brent Cross/Cricklewood/West Hendon Regeneration Area, as well as the White City and Wembley (Quintain) developments. The scale, character and potential impact of these major new retail schemes on shopping patterns in the West London study area are considered in more detail in the remainder of this study.

6. THE WEST LONDON CENTRES: LB EALING

- 6.1 This section provides an overview of the relative health and role of the main centres in the London Borough of Ealing, and their relationship to each other in the retail hierarchy. We also examine the role and influence of out-of-centre facilities on shopping patterns on the performance of town centres. Where possible we have also assessed the relative importance of BME retailing on the overall vitality and viability of centres. This is based on our national and London-wide review of key trends and issues (see Appendix 18), and the key findings of the survey results.
- 6.2 Through a review of the performance and distribution of existing provision, this section develops the qualitative baseline evidence underpinning our recommendations and conclusions on the need for additional retail and leisure floorspace in the London Borough of Ealing over the forthcoming LDF periods. The location of each study centre and out-of-centre retail and leisure destination is illustrated on Plans 2 and 3 (Appendix Volume 1). The analysis outlined in this section and the summary table below draw on the more detailed healthchecks set out in the Supporting Healthcheck Background Paper and the survey findings.

Table 6.1: London Borough of Ealing – Main Centres Key Performance Indicators

| KPIs | Ealing TC | Southall | Acton | Greenford | Hanwell |
|---|--|--------------------------|-------------------|----------------------|---------------------|
| National Rank: | 100 th | 1,528 th | 618 th | 1,034 th | 1,818 th |
| Floorspace (sq m gross) | 130,170 | 55,846 | 29,510 | 25,260 | 18,757 |
| Total No. of Outlets: | 630 | 458 | 294 | 154 | 183 |
| % Comparison Outlets: | 37.4 | 37.6 | 23.5 | 31.2 | 28.4 |
| % Convenience Outlets: | 8.5 | 14.6 | 12.9 | 16.9 | 8.7 |
| % Vacant Units: | 5.4 | 5.5 | 8.2 | 5.2 | 10.9 |
| Comparison Goods Market Share in Borough (%) | 35.4 | 1.5 | 1.2 | 2.1 | 0.4 |
| Rents per sq m (2005) | £1,991 | £968 | £646 | N/a | n/a |
| % Yield (2006) | Ealing Broadway 6% West Ealing 7% | 9.25% | 6.5% | 9.5% | n/a |
| Stated requirements: | 48 | 32 | 22 | 28 | 2 |
| Department Stores: | Beales | - | - | - | - |
| Main multiple anchor stores: | M&S; TK Maxx; (West Ealing = BhS; Woolworths) | Woolworths, Superdrug | Peacocks | Boots, Woolworths | £stretch |
| % visiting centre for fashion shopping only⁽¹⁾: | 9% | 1% | 4% | 8% | 5% |
| Main food stores: | Tesco; Sainsbury; Waitrose; | Somerfield; Iceland | Netto; Iceland | Tesco | Lidl |
| % visiting centre for food shopping only⁽¹⁾: | 27% | 42% | 44% | 30% | 37% |
| % using centre for specialist ethnic food⁽¹⁾: | 11% | 83% | 26% | 51% | 33% |

Source: see Healthcheck Background Paper for a full description and explanation of the key indicators; and ⁽¹⁾in-centre survey results.

Ealing Town Centre

- 6.3 Ealing town centre is the principal focus for shopping in the Borough of Ealing and is defined as a Metropolitan Centre in the London Plan.
- 6.4 The centre of Ealing consists of Ealing Broadway and West Ealing, which comprises two distinct shopping areas separated by other key town centre uses such as offices. Ealing Broadway is the dominant shopping area and comprises a range of national multiples. In contrast West Ealing lies to the west of Ealing Broadway along the Uxbridge Road and is characterised by value-orientated multiple retailers and a mix of independent/ethnic retailers, primarily serving its diverse local resident catchment population. The representation of offices in the town centre adds to the mix of uses and it's overall vitality and viability, with local employees providing a positive source of income.
- 6.5 Our detailed audits and healthcheck of Ealing town centre indicate that the centre is performing reasonably well, although there are gaps in its overall offer. For example, Ealing Broadway has a relatively good selection of mainstream fashion retailers, but has a relative under-provision of high quality fashion brands and a poor department store offer (limited to a small Beales department store in the Broadway Centre) given its status as a Metropolitan Centre.
- 6.6 West Ealing provides a complementary range of more value/ discount retailers to Ealing Broadway, although its comparison offer has declined over recent years following the closure of Marks & Spencer. Currently its offer is principally anchored by two major foodstores (Sainsbury's and Waitrose), along with Bhs, Woolworths and Wilkinsons.
- 6.7 Rents in Ealing have remained constant since 2004 and yields are steady, which indicates that the centre is fairly healthy and investor confidence may be improving. Requirements are strong and include a good range of comparison and service operators. These include a Debenhams department store, which we consider would significantly improve the vitality and viability of Ealing Broadway. The centre would also benefit from a wider choice of high quality fashion and specialist retailers, but currently lacks the supply of larger shop units that meet the requirements of modern retailers.
- 6.8 In terms of access, Ealing benefits from excellent public transport connections and is located at the heart of a dense residential area. This is reflected by the in-centre survey results which show that some 45% of respondents in the centre had travelled by bus, 13% by train and 29% had walked to the centre. However the Uxbridge Road is often congested with traffic, which may partly explain why only 12% of respondents travelled by car. The station gateways to both Ealing Broadway and West Ealing are poor and we consider that they would benefit from investment and improvement.
- 6.9 There is a good range of smaller convenience foodstores in Ealing Broadway, including a Tesco Express, Sainsbury's Local and Marks & Spencer's Foodhall. The former Safeway/Morrisons store in the Broadway Centre is also being reconfigured for a new Tesco Metro store. This will significantly help to strengthen the centre's overall food offer and market share of convenience goods spend.
- 6.10 As stated above, West Ealing is more dependent on its convenience retailers as anchors to its overall retail offer. The Sainsbury's supermarket in the heart of the centre is an important generator of trips and
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linked spend to the town centre. The recently refurbished and extended (by 1,645 sq m net) Waitrose next to West Ealing station provides a higher quality food offer, although pedestrian linkages to the high street are poor. The weekly Saturday farmers market also appears to be popular and provides another complementary offer to Ealing Broadway.

- 6.11 Ealing town centre as a whole has a relatively good and growing mix of specialist ethnic food retailers, including a number of Polish shops to cater for the significant growth in the local population. However, as Table 6.1 shows, the town centre is not a major destination for ethnic food shopping compared with the other main centres in the Borough, particularly Southall and Greenford. Ealing Broadway also has a good choice of branded cafés, restaurants and bars. This is complemented by the growth of a specialist ethnic restaurant/take-away offer at the western end of the Uxbridge Road, leading to West Ealing. Nevertheless, in our judgement the quality and choice of restaurants and bars in Ealing Broadway is more limited than in Chiswick and Hammersmith for example, and its offer is mainly targeted at the 18-30 age group.
- 6.12 The quality of Ealing town centre's environment varies along the Uxbridge Road. In general, the majority of the building facades and shop fronts are well maintained in Ealing Broadway. Moving towards West Ealing the shop fronts appear more rundown and are less well maintained. Ealing's environment, as for many of the West London centres, is significantly influenced by the busy and congested Uxbridge Road. Heavy vehicular traffic on this important "spine road" makes access and movement around these centres difficult for those travelling by car, bus or walking to the centres. In our judgement the pedestrian environments on both sides of the Uxbridge Road are generally poor and are characterised by narrow pavements in most parts.

Southall Town Centre

- 6.13 Southall is a Major Centre located in the west of the Borough of Ealing and is divided into two parts to the north and south of the railway line. The prime shopping area of the centre lies to the north of the railway line and extends along the Uxbridge Road (The Broadway) and along South Road towards the station. The area to the south of the railway line extends along The Green and King Street.
- 6.14 Independent and BME retailers dominate Southall's retail offer, although there are some national multiples located in the northern half of the centre, such as Woolworths. The majority of the independent retailers in Southall are ethnic retailers selling a wide range of convenience and comparison goods. The survey results underline the important role of Southall as a destination for ethnic retailing, serving both its local residents as well as visitors from across the West London region and beyond. For example, some 23% of those interviewed in the centre stated that the main reason for their visit was to purchase ethnic food and a further 42% also indicated food shopping in general. In addition, some 13% of respondents to question 15 of the in-centre survey identified the ethnic shops as one of the centre's main attractions.
- 6.15 Based on our review of national and London-wide trends in BME retailing, we consider that there is potential to introduce more 'mainstream' multiple retailing into Southall to better serve its second and third generation residents, whilst also maintaining and improving its unique ethnic offer. For example, the survey indicated that only 1% of respondents to the in-centre survey specifically visited the centre for

fashion shopping and some 38% identified the need for larger retailers. The centre also comprises a mix of specialist travel agents, banks, communication shops, foreign currency exchanges and hair and beauty salons.

- 6.16 The markets make an important contribution to the overall vitality and viability of Southall. They help to differentiate Southall from other centres in West London, creating activity and character throughout the week. They also provide an important base for BME retail businesses to establish themselves, without the significant overheads associated with operating from shop units. The markets operate in Southall on Tuesdays, Wednesdays, Thursdays and Saturdays and sell different goods ranging from antiques and bric-a-brac (on Thursdays); Poultry (on Tuesdays) and a general market on Saturdays.
- 6.17 Overall Southall is a healthy and viable centre, with a strong ethnic retail offer serving both its local catchment and attracting residents from across West London and beyond. Its vacancy levels are low and rents are relatively strong, having doubled in the last five years. It also has a good level of interest from convenience, comparison and service businesses. However, in our judgement it would benefit from a better supply of larger shop units to attract more mainstream multiple retailers into the centre. In the absence of this more mainstream offer we consider that there will be an increased leakage of shoppers and spend to other competing centres in West London.
- 6.18 In terms of its overall environment, there are several attractive and well-maintained buildings in Southall, but there are also many buildings and shopfronts that are run down and in a state of disrepair. Significantly, over half (54%) of respondents to question 16 of the in-centre survey indicated that they particularly disliked the dirty and poorly maintained streets/pavements in the centre. Nevertheless, there are signs of investment in Southall. For example, the colourful festive lights that are used to celebrate ethnic festivals such as Divali and Eid and provide a recognisable symbol of Southall's multi-faith community and attract visitors from beyond its more West London catchment area.

Acton Town Centre

- 6.19 Acton District Centre is located on the Uxbridge Road to the east of Ealing Broadway. Its commercial offer extends from the junction of the Uxbridge Road at Twyford Crescent in the west, to the Railway Bridge by Acton Central Station in the east.
- 6.20 Acton has a large number of independent retailers selling both convenience and comparison goods. Its retail offer is predominantly value-orientated. This is illustrated by the tenant mix of The Oaks shopping centre, which comprises Netto, Iceland, £-Stretcher and 99p Stores. It also has strong specialist ethnic provision with retailers selling Irish, Polish, Russian and Eastern European, Iranian, Middle Eastern and Halal food. This offer reflects its diverse local catchment population.
- 6.21 Acton's retail offer is largely anchored by its convenience retailers. For example, some 44% of respondents to the in-centre survey indicated that the main purpose of their visit was for food shopping, with c.4% mentioning fashion shopping and a further 6% visiting principally for the financial services. The centre's main anchor and attraction is the Morrisons store, which helps to generate linked trips with other shops and businesses in the centre. Acton has relatively low vacancy levels and its rents have shown strong increases in recent years, principally due to the positive impact of The Oaks Centre.

- 6.22 Overall the centre has a very good level of accessibility to public transport, although it is not directly served by a tube station. However, in our judgement the quality of its environment is average. We noted during our audits that there was some graffiti and litter and the narrow pavements were cluttered with advertisement hoardings. The environmental quality deteriorates towards the eastern end of the centre. In our judgement Acton would benefit from further investment in its shopping and built environment.

Greenford Town Centre

- 6.23 Greenford District Centre is located to the south of the A40 in an established residential area consisting mainly of 1930s and 1950s properties. The centre is located at the crossroads with Greenford Road and Ruislip Road. The prime retail area extends along Ruislip Road, which gently slopes upwards towards the junction with Oldfield Lane South where there is an area of public open space and Greenford Hall.
- 6.24 The centre has a mix of national multiple and independent retailers. There is a strong provision of independent convenience retailers such as VB Supermarket (a large independent Asian supermarket), the Stall Greengrocer, Greenford Butcher and Greenford Wholesale Fish Market Fishmonger. It also has a range of ethnic retailers including Turkish, continental, West Indian, Indian, Irish and Polish foodstore, as well as several Halal butchers.
- 6.25 Greenford's strong and diverse convenience offer is confirmed by the findings of the in-centre survey, which indicated that some 30% of respondents mainly visited the centre for food shopping, with Tesco acting as a key anchor. Nevertheless, a further 8% also visited for fashion shopping and 12% for financial services. The centre functions as an important destination for its local catchment. This is confirmed by the results of the in-centre survey which indicates that over half (55%) of respondents had taken ten minutes or less to get to Greenford, compared to 9% for Southall and 27% for Ealing.
- 6.26 The centre appears to be both vital and viable based on the PPS6 KPIs. For example, vacancies in the centre are low and it has a good level of market interest from a range of comparison, convenience and service operators (including Peacocks, the Early Learning Centre, Iceland, and Superdrug). Although retail yields in the centre are high, they have improved slightly in recent years, which is a potential sign of growing investor confidence.
- 6.27 Greenford has an average level of accessibility to public transport. The town centre is not within walking distance of any train or underground stations, but is well served by the bus network. The results of the in-centre survey indicate, for example, that 53% travel by bus to the centre and 34% walk, with only 12% arriving by car. Our visit to the centre and the results of the in-centre survey also highlighted problems with litter and graffiti in the centre and poorly maintained streets/pavements/shop frontages.

Hanwell Town Centre

- 6.28 Hanwell District Centre is situated along the Uxbridge Road in the west of the Borough, less than one mile from West Ealing to the east and Ealing Hospital to the west. The centre runs along Uxbridge Road and down Boston Road.

- 6.29 Hanwell's retail offer is consistent with its function as a local shopping centre, predominantly serving the needs of its local catchment population. The centre mainly consists of independent retailers occupying small units. The larger purpose-built Lidl and Poundstretcher stores off the Uxbridge Road have strengthened the centre's overall retail offer and there is a Wickes store to the south on Boston Road which serves a wider catchment area.
- 6.30 A significant proportion of the retailers in Hanwell are BME retailers, including Halal butchers and Arabic, Middle Eastern, Polish and Eastern European convenience stores. The centre also comprises a number of ethnic-owned second-hand furniture and electrical retailers. As would be expected for a centre of its size and function, market interest and retailer requirements are limited.
- 6.31 The centre mainly functions as a day-to-day convenience destination for its local resident catchment population. This is confirmed by the results of the in-centre survey, which indicates that c.37% of visitors to the centre were mainly food shopping and some 39% walked to the centre, which was higher than for the other main centres in the Borough. There is also a high proportion of cafés and takeaways and a below average representation of comparison units in the centre.
- 6.32 Hanwell train station is approximately 15 minutes walk from the centre with services to London Paddington, although only a small proportion (3%) of those interviewed in the centre had travelled by train. The centre is also served by frequent bus services along the Uxbridge Road. The results of the in-centre survey indicated that 20% travelled to the centre by bus and 33% by car.
- 6.33 There are some areas for concern in Hanwell. There is a high vacancy rate and its overall environmental quality is poor, due mainly to the impact of traffic on the Uxbridge Road. The centre also lacks key services such as High Street banks, as a number have been converted to restaurants/bars over recent years (one of which is now vacant). We consider that the centre could benefit from a strong food anchor offer to complement the Lidl discount convenience offer, although the potential impact on smaller independent convenience shops and businesses would need to be carefully assessed. In response to question 16 of the in-centre survey, for example, some 16% of respondents specifically identified the poor choice of foodstores in Hanwell, which was higher than for any of Ealing's other main centres.
- 6.34 The variety of the buildings in Hanwell is variable, there are some attractive three storey Victorian terraces but there is also a significant amount of in-fill development, which detracts from the character of the centre. Piles of litter and rubbish bags on the streets are a common occurrence and make the streets feel dirty and untidy. Litter also collects around trees and planting and there is some graffiti. Nevertheless, there are signs of recent investment in the public realm around the Broadway.

Smaller Study Centres

- 6.35 The key smaller centres, their relative retail offer and key indicators are summarised by Table 6.2 below. The Healthcheck Background Paper provides a more detailed assessment of the relative characteristics and health of these smaller centres. In Ealing, these comprise a variety of centres ranging from Pitshanger Village, which has a traditional 'high street' character, to West Way Cross which is a purpose-built shopping centre comprising larger national multiples in large stores, and predominantly

serving car-borne shoppers. Northfields and South Ealing are the largest centres in terms of their overall offer and floorspace.

- 6.36 In general terms most of the smaller centres identified are performing well. They serve the more frequent food shopping needs of their local resident populations and are anchored by either superstores or supermarkets. The vitality and viability of these centres is, to varying degrees, also underpinned by a range of other key services and facilities, such as convenience stores, post offices, butchers, greengrocers, banks, newsagents, hairdressers, cafés, takeaways, restaurants and other key service facilities.
- 6.37 Nevertheless, our audits and healthchecks have identified specific challenges and threats to their future vitality and viability. For example, it is clear that some of the centres would benefit from investment in their general environments and buildings (such as East Acton). Other centres need to attract a stronger food anchor to help strengthen their overall role and offer, and generate more frequent shopping trips (such as Perivale). Also, some centres are facing increased vehicular traffic and congestion problems, but do not have dedicated car parking, which is placing pressure on surrounding residential streets (such as Pitshanger).
- 6.38 These detailed reviews illustrate the roles these smaller centres play relative to the larger centres in the three West London Boroughs in terms of scale, size, retail composition and vacancy rate. It is clear that they perform more local 'top up' shopping roles which are likely to have tighter walk-in catchment areas. A number do provide a range of service uses such as banks and building societies, post offices and chemists, as well as a small range of ethnic food products.

Table 6.2: Smaller Study Centres, London Borough of Ealing: Scale and Composition

| Centre | Total Floorspace (sqm) | No of Outlets | Vacancy Rate (%) | Key Retailers | Ethnic Retail Representation |
|----------------|------------------------|---------------|------------------|--|--|
| Northfields | 13,235 | 150 | 11% | Tesco; Threshers | Polish Food Irish Food Lebanese Cafe Thai Deli |
| Park Royal | 12,923 | 10 | 0% | Asda | None |
| South Ealing | 11,853 | 99 | 9% | Co-Op; Wickes | Polish Food |
| West Way Cross | 11,569 | 13 | 0% | Boots; Next; Brantano; McDonalds; WH Smith | None |
| East Acton | 8,013 | 53 | 11% | Greggs; Homebase; Dreams | Arabic, Afghani, Iranian, Turkish, Greek Halal Butchers Ukrainian Deli Polish Coffee Shop |
| Northolt | 3,671 | 43 | 7% | Co-Op; Costcutter; Barclays Bank | None |
| Perivale | 2,914 | 40 | 8% | None | Polish Food Halal butcher Lebanese Food Sri Lankan Meat |
| Pitshanger | 5,452 | 65 | 5% | Co-Op; Robert Dyas | None |
| Sudbury Hill | 2,090 | 17 | 0% | Iceland | None |

Source: Appendices in Volumes 2 & 3

Out of Centre Retail Floorspace

- 6.39 The location of all out-of-centre retailing is illustrated in Volume 1, Plan set 3. Ealing's only large out-of-centre foodstore is the Tesco in the old Hoover building located in the north of the Borough along the A40. The store is open 24 hours and sells a variety of non-food products including clothes, as well as ethnic products such as Kosher and Afro-Caribbean foods. There are also two Tesco Metro stores located outside of the Borough's designated town centres.
- 6.40 The main out-of-centre comparison offer is in the Great Western Retail Park, which has Carpets, Currys, Topps Tiles and Matalan. There is also a Homebase in Acton and a Wickes on Boston Road, Hanwell. A 2,500 sq m B&Q on the A40 has recently closed and was still vacant at the time of writing. It should be noted that the capacity projections in later sections represent need over and above this vacant floorspace.

Leisure Provision

- 6.41 Plan set 3 (Volume 2) also identifies the location of the main leisure facilities in Ealing Borough. It shows that Ealing has a range of both town centre and out-of-centre leisure facilities. There are several private leisure and health & fitness clubs directly serving residents in Ealing Broadway, including Holmes Place (now Virgin Active), Ealing Squash Club and the Energize gym at the West London College. Private leisure provision is also set to increase with the opening of the Eden Health Club, which forms part of a new residential development on the Uxbridge Road. Planning permission has also been granted to extend Ealing Squash Club to provide 2,750 sq m of leisure floorspace incorporating a swimming pool and additional squash courts.
- 6.42 In Acton, there is a Fitness First gym and the public Acton Swimming Baths. Hanwell also has a Golds Gym. There is also the Boots Wellbeing Centre at West Way Cross and a David Lloyd Leisure Centre located behind the Sudbury Hill Centre.
- 6.43 The majority of the Council's own leisure centres are located outside of the Borough's designated centres, with the exception of the Northolt Swimarama on the outskirts of Northolt. Southall Sports Centre is also located outside of Southall town centre. There are also several private leisure centre operators located in out-of-centre locations, including the Virgin Active Club and The Park Club in Acton.
- 6.44 In terms of commercial/entertainment leisure provision, there is a three screen Empire cinema in Ealing Broadway on the Uxbridge Road, but it is small and out-dated by modern standards. Planning permission was granted in 2003 to redevelop the site to provide a 16-screen multiplex, although this consent has not yet been implemented. Southall also has a three screen Bollywood cinema, and there is a Gala Bingo in Acton.
- 6.45 The main out-of-centre leisure provision in the Borough of Ealing is the Park Royal Leisure Park, which is located in the east of the Borough along the A40. This scheme comprises various leisure facilities including a 9-screen Vue cinema, restaurants and a MegaBowl. It is a major attraction for people living in the Ealing area.

7. THE WEST LONDON CENTRES: LB HAMMERSMITH & FULHAM

7.1 This section provides an overview of the relative health, role and attraction of the main study centres in the London Borough of Hammersmith and Fulham. This summary commentary and the table below draw on the more detailed healthchecks set out in the supporting Healthcheck Background Paper. The location of each study centre and out-of-centre retail and leisure scheme is illustrated on Plan set 3.

Table 7.1: LB of Hammersmith & Fulham – Main Centres Key Performance Indicators

| KPI | Hammersmith | Fulham | Shepherds Bush |
|---|---|--|-------------------|
| National Rank: | 149 th | 764 th | 483 rd |
| Floorspace (sq m gross) | 59,080 | 40,250 | 40,090 |
| Total No. of Outlets: | 285 | 279 | 303 |
| % Comparison Outlets: | 35.1 | 27.6 | 46.2 |
| % Convenience Outlets: | 6.3 | 11.8 | 12.9 |
| % Vacant Units: | 6.7 | 10.8 | 5.9 |
| Comparison Goods Market Share in Borough (%) | 17.8 | 9.0 | 3.6 |
| Rents per sqm (2005) | £1,829 | £1,506 | N/a |
| % Yield (2006) | 9% | 9% | N/a |
| Stated requirements: | 49 | 50 | 26 |
| Department Stores: | - | - | - |
| Main multiple anchor stores: | M&S; Habitat, Primark, WH Smiths, Boots | Virgin, Boots | Argos |
| % visiting centre for fashion shopping only⁽¹⁾: | 20% | 2% | 8% |
| Main food stores: | Tesco; Sainsbury; Iceland | Sainsburys; Waitrose; M&S Simply Food; Iceland; Somerfield | Morrisons |
| % visiting centre for food shopping only⁽¹⁾: | 16% | 31% | 31% |
| % visiting centre for work / business⁽¹⁾: | 26% | 12% | 9% |
| Managed Shopping Centres | Broadway Centre Kings Mall Centre | Fulham Broadway | West 12 |

Source: see Healthcheck Background Paper for a full description and explanation of the key indicators; and ⁽¹⁾in-centre survey results.

Hammersmith Town Centre

7.2 Hammersmith is defined in the London Plan as a Major Centre and is the largest retail centre in the Borough. The town centre's main shopping provision runs along King Street and also includes parts of Hammersmith Road and Shepherds Bush Road. The prime retail frontage comprises the Broadway

Shopping Centre (which opened in 1993) and the eastern end of King Street, which incorporates Kings Mall Shopping Centre (which opened in 1979).

- 7.3 The centre has a good range of national multiple retailers and two managed shopping centres. It has a relatively strong fashion offer, which is reflected by the fact that 20% of respondents to the in-centre survey visited the centre mainly for clothing and footwear shopping and 45% identified that it had "good shops". However, it does not have a department store to anchor its retail offer and both of the shopping centres would benefit, in our judgement, from investment and improvement. A relatively small proportion of respondents (c.16%) also visited the centre for food shopping reasons only, which is lower than for the other main centres in the three London boroughs.
- 7.4 Rents and yields in the centre have both improved in recent years and retailer demand is relatively strong. The BME retail offer in the centre is limited and this is reflected by the fact that only 10% of respondents to the in-centre survey visit the centre to purchase specialist ethnic food products, which is lower than for Shepherds Bush (23%) and Fulham (38%).
- 7.5 The centre is well served by public transport, although congestion levels make access by car difficult. This is reflected by the fact that only 9% of respondents to the in-centre survey had travelled by car and 10% identified the need to reduce road congestion. In comparison 40% of respondents travelled by tube, 21% by bus and some 24% walked to the centre. Heavy vehicular traffic severely impacts on the environmental quality and the pedestrian experience in the centre. There has been some investment in the public realm, most noticeably at Lyric Square.

Fulham Town Centre

- 7.6 Fulham is designated as a major centre in the London Plan and situated at the southern end of North End Road, extending south to Fulham Broadway. The Prime Retail Frontages includes the southern end of North End Road as well as a number of the units around Jerdan Place.
- 7.7 The centre has a good mix of national multiples and independent retailers. It has one managed shopping centre, Fulham Broadway, which opened in 2002 and is bright and modern. Nevertheless, some 21% of respondents to the in-centre survey identified the need to attract larger retailers in the centre.
- 7.8 Fulham has a good range of convenience retailers. Its important convenience offer is reflected by the fact that c.31% of respondents to the in-centre survey mainly visited Fulham for food shopping, with a further 12% visiting for work/business reasons and c.2% for fashion shopping only.
- 7.9 Fulham's retail offer includes the street market along North End Road, which sells a range of goods from fruit and vegetables to toiletries, small household goods and clothing. Towards the northern end of North End Road there is a cluster of specialist ethnic convenience shops which are important to the centre's overall offer and attraction. Fulham mainly serves a more local catchment, which is illustrated by the fact that some 54% of respondents to the in-centre survey walked to the centre. It also has strong leisure provision and a wide range of cafés, bars and restaurants. The street market also is focused on discount goods and can exacerbate congestion. Rents and yields in the centre have both improved in recent years, due mainly to the development of the new shopping centre.

- 7.10 The urban environment and quality of the public realm varies throughout the town centre. The quality is very high around Vanston Place where there are cobbled streets, semi-mature trees and high quality street furniture. This area is dominated by traditional buildings, but does have some more contemporary architecture that is well integrated into the street scene. Fairly up-market and specialist retailers and services dominate this area.
- 7.11 In contrast to this, discount orientated stores dominate the retail offer along North End Road. This street is very busy in terms of both vehicular and pedestrian traffic. Although many of the frontages along here are slightly dated they appear to be well maintained. A significant proportion (21%) of respondents to the in-centre survey identified the need for cleaner shopping streets/pavements.

Shepherds Bush Town Centre

- 7.12 Shepherds Bush is designated as a District Centre in the London Plan and covers the area surrounding Shepherds Bush Common, including Shepherd Bush market. The Prime Retail Frontages are confined to the stretch of retail along Uxbridge Road and the West 12 shopping centre. The London Plan designates Shepherds Bush as a district centre based on the existing floorspace and does not account for the floorspace under construction. The London Plan designation relates only to the existing shopping area whereas the town centre boundary in the UDP includes Westfield.
- 7.13 The results of the in-centre survey indicate that Shepherds Bush mainly serves its local resident catchment population, with the majority of respondents either walking to the centre (37%), or travelling by bus (28%), or train/tube (28%). Only 5% arrived by car, which probably reflects the limited parking provision in the centre as a whole and the levels of congestion on the roads.
- 7.14 The town centre is fairly diverse and fragmented by the road network. The majority of the national multiple retailers are located in West 12 Shopping Centre, which was refurbished in 2001, and along the northern side of Uxbridge Road, although many of these units are small and dated. The poor choice of comparison goods retailers in the centre and the need for larger shops were key responses to the in-centre survey. Encouragingly, there is currently market interest from a range of operators for representation in Shepherds Bush, including some multiples such as TK Maxx that would significantly improve the centre's overall offer and attraction.
- 7.15 The in-centre survey results show that the main reason why people visit the centre is for food shopping (c.31% of respondents), with a smaller proportion identifying fashion shopping (c.8%). The centre's food offer is anchored by Morrisons and Sainsbury's Local, along with a good choice of independent specialist ethnic food retailers around Shepherds Bush Market. This busy, vibrant market is open Monday to Saturday and sells a wide range of goods from clothing, household goods, haberdashery to fruit and vegetables and Halal meats.
- 7.16 The in-centre survey indicated that just under one-quarter of respondents visit Shepherds Bush to buy specialist ethnic food products. Although 8% specifically visit the market, a higher proportion (11%) shop at Morrisons. This reflects the wider trends in the grocery sector (as described in Appendix 15), as the larger food operators are increasingly able to compete with local independent BME businesses for spend on specialist ethnic food products. As for Southall and other centres where BME retail

businesses make a significant contribution to their overall vitality and viability, it is important to maintain and enhance the role, attraction and character of the markets as they provide the “seedbeds” for future business growth and development.

- 7.17 The Westfield scheme is currently being developed on a site to the north of the existing primary shopping area. This scale, character and potential impact of this major new shopping centre development is described in more detail later in this study. It will comprise significant new retail and leisure floorspace, to be anchored by a number of major department and variety stores. Beyond this site lies part of the White City *Opportunity Area* identified in the London Plan as a having potential for a major mixed use development.

Smaller Study Centres

- 7.18 The Borough's key smaller centres and their relative retail offer are set out in Table 7.2 below. As we have explained, in Section 4, the Council requested we review an alternative set of smaller centres as they seek to propose options to modify the hierarchy of smaller centres in the Borough. The Healthcheck Background Paper provides a more detailed assessment of the relative characteristics and health of these smaller centres. We set out some of the key headline findings below.
- 7.19 Hammersmith and Fulham has a wide range of smaller centres which vary in size, quality and character. The centres range from local parades of shops such as the Edward Woods Estate to larger areas which have significant proportions of comparison retailers such as Fulham Road and King Street West, which attract people from further afield.
- 7.20 In general most of the smaller centres in Hammersmith and Fulham are performing well with the exception of Greyhound Road and Dawes Road which have a very high proportion of vacant units and consequently suffer from a poor environment with boarded up shopfronts, litter and graffiti. We consider that these centres would benefit from consolidation to ensure that they do not deteriorate further. This could be achieved by relaxing the types of uses that are permitted in these centres and by investing in signage and the public realm. We also consider that Uxbridge Road East and Uxbridge Road West function as one extended linear centre along the Uxbridge Road. There are several vacant units in Uxbridge Road West and we do not consider that this centre should be allowed to expand any further.
- 7.21 Several of the other centres have a weak convenience offer which we consider could be enhanced by an anchor foodstore, which would better serve the needs of local populations and reduce the need for people to travel to other centres for their local convenience goods and services and would help support other uses in the centres. The majority of the centres would benefit from environmental improvements, especially the Edward Woods Estate, which is considered to have a very dated appearance.
- 7.22 Congestion and accessibility are also important issues for the centres. Car parking opportunities are limited in these centres and could be improved in some of the centres in order to make it easier for people to park for short periods of time to reduce pressure on surrounding residential areas. Busy roads also create barriers for pedestrians and we consider that linkages and crossings could be improved, particularly along the Uxbridge Road and Fulham Road.

Table 7.2: Smaller Study Centres, London Borough of Hammersmith & Fulham: Scale and Composition

| Centre | Total Floorspace (sq m) | No of Outlets | Vacancy Rate | Key Retailers | Ethnic Retail Representation |
|--------------------------------|-------------------------|---------------|--------------|--|--|
| King Street West | 14,242 | 100 | 7% | Tesco Allied Irish Bank Pizza Hut Savers | Polish Food Polish Travel Agents Thai Food Halal Butchers |
| Fulham Road | 9,112 | 97 | 6% | Starbucks Café Nero Carphone Warehouse Natwest | None |
| North End Road/West Kensington | 7,311 | 90 | 1% | Tesco Costcutter Co-Op Greggs Carphone Warehouse | Russian Food |
| Parson's Green/New King Road | 7,187 | 84 | 10% | Starbucks Budgens | None |
| Uxbridge Road West | 7,045 | 87 | 8% | Co-Op KFC | Eastern European Foods |
| Uxbridge Road East | 6,487 | 59 | 2% | Nandos Blockbuster Dominos | Polish Food Halal Butchers Middle Eastern Food |
| Fulham High Street | 6,385 | 68 | 7% | Fulham Football Club Shop | Chinese Medicine |
| Shepherd's Bush Road | 5,860 | 63 | 8% | William Hill New Look Café Rouge Oliver Bonas | Eastern European Food Thai Food |
| Askew Road | 5,810 | 67 | 10% | Costcutter Co-Op | Lebanese Food |
| Greyhound Road | 4,220 | 42 | 24% | Boots Sainsburys | None |
| Munster Road/Fulham Cross | 4,055 | 66 | 18% | Budgens | None |
| Fulham Palace Road North | 3543 | 46 | 7% | None | None |
| Goldhawk Road | 2,808 | 41 | 5% | William Hill | Caribbean Food African Food Irish Butcher Halal Butcher African Hairdressers |
| East Acton | 2,654 | 23 | 0% | Iceland William Hill | Arabic Food |
| Dawes Road | 2,140 | 28 | 29% | None | African Hairdressers Polish Food |
| Wandsworth Bridge Road North | 1,973 | 29 | 3% | Threshers | None |
| Blythe Road | 1,155 | 19 | 11% | Threshers Costcutter | None |
| Edward Woods Estate | 1,380 | 15 | 7% | Costcutter | East African and Middle Eastern Food |
| Bloemfontein Road | 1,019 | 13 | 0% | Vantage Pharmacy William Hill | Polish Food |

Out of Centre Retail Floorspace

- 7.23 The location of all out-of-centre retailing is illustrated on Plan set 3 (Volume 1). There is only one out-of-centre retail park in the Borough of Hammersmith and Fulham. This is the Hurlingham Retail Park in the south of the Borough occupied by Curry's and PC World. There are two large out-of-centre foodstores, the Tesco at 108 Shepherds Bush Road and the Sainsbury's at Townmead Road, which has planning permission for an extension subject to a Section 106 agreement. There are also several Tesco Express stores.

Leisure Provision

- 7.24 Plan set 3 (Volume 1) shows the location of all leisure provision in the Borough. There are five leisure centres run by the Council in the Borough of Hammersmith and Fulham. The Hammersmith Squash and Fitness Centre is the only one that is located in a town centre. Other facilities include the Lillie Road Fitness Centre, the Phoenix Fitness Centre and Janet Adegoke Swimming Pool and the Linford Christie Outdoor Sports Centre. There is also Fulham Pools which is a public swimming pool and health club run by a public/private partnership between the Council and Holmes Place (now Virgin Active).
- 7.25 There are a number of privately operated gyms and health clubs in the Borough including the Lotte Berk Centre, David Lloyd Leisure and Fitness Club in Fulham, Fitness First and Holmes Place in Hammersmith and Royal Fitness in Shepherds Bush. Planning permission exists at the former Odeon cinema in Shepherd's Bush Green for a mixed-use scheme including a health club, gym and swimming pool and planning permission also exists for a health and fitness club at the Beaconsfield Workshop at Olympia.
- 7.26 In terms of other leisure facilities, Hammersmith has a four screen UGC cinema on King Street, the Hammersmith Palais nightclub and the Hammersmith Carling Apollo which is a music and comedy venue. Shepherds Bush currently has a 12 screen Vue Cinema, Rileys Snooker Club, Shepherds Bush Pavilion (an event space) and Shepherds Bush Empire, which is a music venue. The new White City development will also include a large multiplex cinema, although the number of screens has not been conditioned through the planning consent. It is evident that the new cinema could accommodate up to 20 screens and consequently have a significant influence in West London. Fulham has a nine screen Vue Cinema and a Mecca Bingo.

8. THE WEST LONDON CENTRES: LB OF HOUNSLOW

- 8.1 This section provides an overview of the relative health, role and attraction of the main study centres in the London Borough of Hounslow. This summary commentary and the table below draw on the more detailed healthchecks set out in the supporting Healthcheck Background Paper. The location of each study centre and the out-of-centre retail and leisure destinations is illustrated on Plans 2 and 3.

Table 8.1: LB of Hounslow – Main Centres Key Performance Indicators

| KPI | Hounslow | Chiswick | Feltham | Brentford |
|--|--------------------------------|---------------------------|--------------------------|---------------------|
| National Rank: | 165 th | 263 rd | 882 nd | 1.946 th |
| Floorspace (sq m gross) | 76,868 | 57,566 | 36,897 | 16,842 |
| Total No. of Outlets: | 319 | 384 | 95 | 85 |
| % Comparison Outlets: | 41.7 | 37.5 | 28.4 | 22.4 |
| % Convenience Outlets: | 7.2 | 7.3 | 15.7 | 9.4 |
| % Vacant Units: | 5.3 | 7.6 | 15.7 | 15.3 |
| Comparison Goods Market Share in Borough (%) | 21.1 | 7.8 | 3.1 | 1.9 |
| Rents per sqm (2005) | £1,076 | £1,453 | N/A | N/A |
| % Yield (2006) | 9.5% | 7% | >10% (see Note A) | N/A |
| Department stores: | Debenhams | - | - | - |
| Main multiple anchor stores: | M&S, Top Shop, Primark, Boots, | Waterstones, M&S, Spa NK, | Next, Matalan, New Look, | - |
| % visiting centre for fashion shopping only ⁽¹⁾: | 55% | 2% | 20% | 2% |
| Main food stores: | Asda | Sainsburys, Tesco | Asda | Somerfield |
| % visiting centre for food shopping only ⁽¹⁾: | 3% | 32% | 46% | 16% |
| % visiting centre for work / business ⁽¹⁾: | 0% | 16% | 5% | 20% |
| Managed Shopping Centres | The Treaty Centre | None | The Centre | None |

Source: see Healthcheck Background Paper for a full description and explanation of the key indicators; and ⁽¹⁾in-centre survey results.

Notes: please note that the healthchecks and surveys for Hounslow Town Centre were conducted prior to the opening of Phase One of the Blenheim Centre.

Note A: From Spring 2002 reporting locations with a yield of 10% or over were not included in the time series on the assumption that such locations are not of major interest in terms of retail property investment. The locations however are still monitored and if evidence indicates yields have fallen to less than 10% the time series is continued.

Floorspace sq m gross includes all town centre units: Convenience, comparison, service, vacant and miscellaneous.

Hounslow Town Centre

- 8.2 Hounslow is a Metropolitan Centre located in the east of the Borough. It has excellent public transport accessibility with two underground stations, a railway station and numerous bus routes. There is also a high provision of car parking. This is reflected by the findings of the in-centre survey, which indicates that some 49% travel to the centre by car and 44% by bus, with only 6% walking.
- 8.3 It is a predominantly linear high street, anchored by two managed shopping centres; the Treaty Centre and the Blenheim Centre. Our detailed audits and healthcheck of Hounslow indicate that the town centre is relatively healthy and is performing well against a number of KPIs. It has a good range of national multiple retailers and anchor high street fashion stores including Debenhams, Marks & Spencer, Top Shop, Primark and Boots.
- 8.4 The Blenheim Centre shopping scheme is being developed over two phases. Phase One opened in October 2006 and has significantly improved Hounslow town centre's retail offer and environment. The Asda store will significantly improve the quality and attraction of the centre as a destination for food shopping, clawing back trade from other major foodstores in the area, such as the Tesco store at Hayes.
- 8.5 Phase Two of the Blenheim Centre has planning permission, although we understand that it is currently subject to renegotiation. It could provide an additional c.13,000 sq m of town centre comparison goods floorspace and 1,112 sq m of A3 floorspace. This will help to meet the qualitative need identified by the in-centre survey, whereby some 36% of respondents identified a poor choice of comparison goods retailers in the town centre and a significant 41% called for more large retail operators.
- 8.6 Market interest in Hounslow as a shopping location is relatively strong on the back of the Phase One development of The Blenheim Centre and it is likely that investor confidence in the centre will increase following the proposed Phase Two extension to this centre. Although there are a number of vacant units in the town centre, we understand that these are currently under alteration/reconfiguration.
- 8.7 The centre has a good range of leisure facilities including two bingo halls, a theatre and a new health and fitness centre. Although the urban environment in Hounslow has undergone improvements in recent years, the environmental quality of the centre is mixed and the buildings and street frontages decline in quality towards the periphery of the centre.

Chiswick Town Centre

- 8.8 Chiswick is defined as a Major Centre in the London Plan, and is located in the east of the London Borough of Hounslow. The centre forms a traditional linear high street incorporating Chiswick High Road, Turnham Green Terrace, Turnham Green and Chiswick Common. There are two underground stations at Chiswick Park and Turnham Green and the main car park adjoins Sainsbury's.
- 8.9 Our detailed qualitative assessment of Chiswick indicates that the centre is healthy and performing well. It predominantly functions as a successful upmarket retail destination with many niche, boutique style
-

shops such as Spa NK, Oliver Bonas and Whistles, serving its relatively affluent catchment population. This is reflected by the results of the in-centre survey, which indicated that 7% of respondents visited the centre mainly for personal/luxury goods shopping.

- 8.10 Chiswick's high quality specialist offer is supported by a limited range of national multiple retailers, including Waterstones and Marks & Spencer. The centre has no department store or shopping centre to anchor its overall retail offer, although we understand that there is a requirement from Debenhams. Although attracting an anchor department store to Chiswick would significantly increase its overall offer, a higher proportion of respondents to the in-centre survey (11%) called for an improvement to the range of independent and specialist shops, rather than a need for larger retailers (5%).
- 8.11 Chiswick's quality café, restaurant and bar provision is an important part of its overall daytime and evening offer. There is a mix of independent upmarket cafés and restaurants, as well as high street chains such as Zizzi, Café Nero and Starbucks, many of which have outside seating areas.
- 8.12 Chiswick has a good representation of major foodstores including a large format Sainsbury's, Marks & Spencer, a Sainsbury's Local and a Tesco Express. The in-centre survey results confirmed that some 32% of respondents were mainly visiting the centre for food shopping purchases. There are also a number of fruit and vegetable stalls on Chiswick High Road, but a more limited ethnic retailer representation compared to other West London centres, which probably reflects the profile of its local resident population.
- 8.13 Chiswick is an attractive and well maintained town centre. The built environment is interesting with a range of well maintained architectural styles. Its pavements are generally wide, which has a positive impact on the pedestrian experience. However, the High Road is very busy with vehicular traffic that detracts from the environmental quality of the centre and impacts upon pedestrian and cyclist access and movement.

Feltham Town Centre

- 8.14 Feltham is a District Centre located in the south west of the Borough of Hounslow. The centre is not on the London Underground but has good public transport access, as well as relatively good parking provision. This is confirmed by the in-centre survey findings which indicate that some 46% travelled to the centre by bus, 25% walked and a further 26% arrived by car. However, the highest proportion of respondents (13%) also commented that traffic congestion made it difficult to get to the centre by car.
- 8.15 Feltham has recently benefited from significant investment following the redevelopment of its managed shopping centre – called 'The Centre' - which is an open-air precinct comprising the majority of retail and service units in Feltham. The extension of the shopping centre has provided large modern retail units in a pedestrianised environment along with a hotel, library, medical centre and apartments. Although there are still a number of vacant units in the centre, we understand that these are currently being marketed or are under offer.
- 8.16 The redevelopment of 'The Centre' now means that Feltham has a relatively good fashion offer, with key retailers including Next, New Look and Matalan. This is confirmed by the results of the in-centre survey,

which indicated that some 20% of respondents mainly visited Feltham for fashion shopping purchases. Furthermore, some 42% commented on its good choice of shops, which was significantly higher than for Chiswick (19%), Hounslow (7%) and Brentford (2%). According to the latest retailer requirements list there is also strong interest from a number of retailers that would help to consolidate its overall vitality and viability of the centre, such as TK Maxx.

- 8.17 Our detailed healthcheck indicates that the town centre has a strong convenience offer including Asda, Aldi, Lidl and Tesco. The results of the in-centre survey confirm that some 46% of respondents mainly visited the centre for food shopping reasons, specifically Asda. This is higher than for the other main LB of Hounslow centres.
- 8.18 Although some 21% of respondents to the in-centre survey also indicated that they purchase specialist ethnic food products in the centre, a significant proportion of these people shop in Asda for these types of products. This reflects the growing trend, as described in Appendix 17, whereby major foodstore operators are able to increase their range and market share of the ethnic food retail market.
- 8.19 The environmental quality and urban environment of Feltham is generally good and has improved significantly by the redevelopment of 'The Centre'. This redevelopment is of a high standard and the pedestrianised layout makes for a safe pedestrian environment. The south side of High Street has The Green and pond, which also contribute to the centre's overall environmental quality.

Brentford Town Centre

- 8.20 Brentford is defined as a District Centre in the London Plan. Although it is not on the London Underground it does have a national rail station around a 5 – 10 minute walk from the town centre. The main parking provision in the centre is at Somerfield and Albany Parade. The results of the in-centre survey indicate that some 42% of respondents walked to the centre and 33% travelled by bus, with only 14% arriving by car. With the majority of respondents (56%) having travel times of less than 10 minutes, this confirms that the centre mainly serves the needs of its local resident catchment population.
- 8.21 Our detailed qualitative assessment of Brentford indicates that there is a good representation of services such as high street banks and cafés. However, the centre's convenience offer is limited to the Somerfield store. The results of the in-centre survey confirm that c.16% of respondents mainly visited the centre for food shopping reasons and 12% indicated that there was a poor choice of foodstores in the town. Based on our healthcheck of the centre and survey results, we consider that there could be the potential to strengthen and improve the centre's overall food and convenience offer to better meet the needs of its local resident population.
- 8.22 The range and choice of comparison goods and fashion retailers and multiple operators is also limited. This is reflected by the results of the in-centre survey, with only 2% of respondents specifically visiting Brentford for clothing and footwear purchases. There is also a high proportion of vacant units in the centre and only a few BME retailers.
- 8.23 Despite this, retailer demand for the centre is high given its size and there are requirements from a range of retailers that could significantly increase the role, offer and attraction of Brentford to its existing

and growing catchment population. For example, we understand that Superdrug, Clarks, Tesco, Wetherspoons and Subway all have requirements for Brentford.

- 8.24 The quality of the urban environment in Brentford is mixed. The High Street is very busy and heavy vehicular traffic effectively divides the high street and impedes pedestrian movement. On our visits to the centre we noted that there are a large number of derelict buildings and run down shop frontages, which detract from its environmental quality.
- 8.25 Nevertheless, there are also areas of high environmental quality and visual interest. For example, the Brentford Lock development is a very high quality mixed use scheme comprising riverside town houses and apartments with a Piazza, wine bar and Coffee shop. In the context of the significant new development (both built, planned and proposed) in Brentford over recent years, we consider that there is a significant opportunity to strengthen Brentford's overall offer to meet the needs of its growing residential population.

Smaller Study Centres

- 8.26 The table below summarises the key characteristics of the Borough's smaller centres based on the more detailed audits and healthchecks set out in the Appendices.
- 8.27 Hounslow's smaller centres vary in size and character. Hounslow West is the largest centre by floorspace with more than double the quantum of floorspace found in the other small centres. Hounslow West has a strong mix of national multiples retailers and ethnic retailers selling comparison and convenience goods. Somerfield acts as a key anchor but the store is located in a dated and unattractive building in the middle of the centre, which we consider would benefit from investment and redevelopment. Hounslow West also has a high proportion of takeaways, which appear to be thriving due to their proximity to Hounslow West tube station.
- 8.28 The rest of Hounslow's smaller centres are smaller in scale and serve their local neighbourhoods with a range of convenience and service uses. The majority of the centres have a strong convenience offer, either in one foodstore or several smaller corner shops. The centres have a good range of local uses although several lack financial services such as banks including Heston and Cranford.
- 8.29 From our detailed audits and site visits of the centres, we consider that there are several key issues facing the centres which would improve their vitality and viability. For example, improving the public realm and environmental quality should be a priority particularly in Bedfont, Hanworth and Hounslow West. Moreover, there are several distinctive landmark buildings in some of the centres (such as Cranford and Hounslow West) which we consider could be improved. There is also a vacant pub site in Old Isleworth which is detracting from the centre's environment and which we consider would offer an opportunity for a mixed-use development.
- 8.30 Accessibility is also important, particularly for the centres along the A4 such as Heston and Cranford. This busy road causes pollution, as well as creating a barrier for pedestrians and we consider that linkages should be improved. Car parking also needs to be improved in some of the centres including Old Isleworth and Cranford. In particular, it is important to make it easier for people to park for short

periods of time and to improve signage to dedicated car parks to reduce pressure on surrounding residential areas.

Table 8.2: Smaller Study Centres London Borough of Hounslow: Scale and Composition

| Centre | Total Floorspace | No of Outlets | Vacancy Rate | Key Retailers | Ethnic Retail Representation |
|---------------|------------------|---------------|--------------|---|--|
| Hounslow West | 13,440 | 55 | 2% | Somerfield Iceland Boots Blockbuster Bakers Oven Barclays Bank | Indian Food Halal Butchers Sri Lankan Food Afro-Caribbean Food Hindu Music/Film Saris Indian Travel Agents |
| Bedfont | 5,417 | 54 | 4% | Budgens Barclays Bank | None |
| Isleworth | 4,351 | 50 | 2% | Spar Threshers William Hill Londis | None |
| Cranford | 3,516 | 33 | 12% | Tesco Express Costcutter | Polish Food Mongolian Takeaway Mediterranean Café |
| Hanworth | 2,644 | 30 | 13% | Londis Greggs Moss Chemist | None |
| Heston | 2,599 | 37 | 8% | Londis | Halal Butcher Polish Food |
| Old Isleworth | 2,488 | 29 | 14% | Londis | Afro-Caribbean Food Armenian Travel Agents |

Out of Centre Retail Floorspace

- 8.31 Plan set 3 identifies the location of all out-of-centre provision in the Borough. It shows that Hounslow's out-of-centre foodstore provision is dominated by Tesco. It has a large store at Gillette Corner, which has recently had a mezzanine floor installed and sells a range of non-food products. However, we understand that the mezzanine has been refused a Certificate of Lawfulness. There are also two other Tesco Extra stores. The one adjacent to the Bull Bridge Industrial Estate is open 24 hours and sells a range of ethnic products, including Afro-Caribbean, Kosher, Halal and Mediterranean foods. The second store at Mogden Lane also sells Kosher and Afro-Caribbean foods. There are also several Tesco Express stores within the Borough. The only other out-of-centre foodstore is Aldi, Hospital Road, which is located adjacent to the boundary of the town centre.
- 8.32 There are several out-of-centre retail parks in the London Borough of Hounslow. The Apex Retail Park is located in the south west of the Borough and includes Currys and Wickes as tenants. The Ivy Bridge Retail Park near Isleworth comprises MFI, Currys, Halfords, Comet and JJB Sports. The Manor Lane

Retail Park is located just off Feltham High Street and includes Pets at Home, Carpetright and Tile and Bath Warehouse. There are also a number of stand-alone stores in the Borough, including Homebase, B&Q, Currys, PC World and Carpetright.

Leisure Provision

- 8.33 Plan set 3 illustrates the location of the major leisure facilities in the Borough. Like Ealing, the majority of the Council's leisure facilities are located outside of designated town centres. Privately run facilities also tend to be located in out-of-centre locations.
- 8.34 There are a number of high end health and fitness clubs around Chiswick, including the Esporta and West 4 Health & Fitness Clubs. The Esporta by Chiswick Riverside has recently been re-built following fire damage. The Civil Service and the University of London both have large sports complexes by Chiswick Riverside.
- 8.35 In terms of other facilities, Hounslow town centre has both a Gala and Mecca bingo and the Paul Robeson Theatre. We also understand that Phase Two of the Blenheim Centre will be anchored by a 10-12 screen multiplex cinema. Brentford town centre has the Watermans Cinema and Arts Centre, which shows a variety of plays and films.
- 8.36 The main focus of out-of-centre leisure provision in the Borough is the Leisure West complex in Feltham, occupied by a 14-screen Cineworld, a Megabowl, Gala Bingo and various restaurants including Pizza Hut and Frankie and Benny's.

9. BENCHMARKING OF CENTRES

- 9.1 Drawing on our detailed review of the retail hierarchy in West London we have benchmarked the centres against a range of indicators to assess their relative position and role. The brief requested that this study should review circa fifty centres. This exercise produces a key baseline position to help understand the scale, position and retail offer in each centre, which will inform our assessment of the potential impact of commitments. Together with the supplementary health checks, background policy review, market research and our overall understanding of the study area, this exercise assists in reviewing the impact of schemes in the pipeline, and consequent changes to shopping patterns and the market share of centres.
- 9.2 This method of benchmarking ranks the centres against each other in terms of scale and retail composition. This also provides a useful starting point with which to review retail hierarchies over the forthcoming LDF period. It is important to point out that this methodology does not take into account qualitative factors which we recommend should also be taken into consideration when reviewing retail hierarchies and implementing changes to policy definitions in the LDF. Nevertheless, this ranking can be drawn upon to inform this process as part of the evidence base with which to develop such policy options.

Larger Centres

- 9.3 The quantitative indicators we have used for our benchmarking assessment are as follows:
- Catchment population (i.e. total population within catchment area);
 - Shopping population (i.e. total population using the town centre from within the catchment area);
 - Shopping population as a proportion of catchment population;
 - Comparison goods turnover;
 - Current published retailer requirements;
 - Quantum of comparison goods floorspace;
 - Quantum of convenience goods floorspace; and
 - Total retail floorspace.
- 9.4 The aim of this analysis is to give an indication of the relative performance, size and attraction of each centre to enable an informed decision regarding their designations within the West London retail hierarchy. As such, the greater the amount of floorspace, retailer requirements and catchment/shopping populations, the higher the rank order. There are twelve centres, and the best performing centre in each indicator is given 12 points, while the worst performing centre is awarded 1 point.

- 9.5 Appendix 8 sets out the ranking of the centres on the basis of each indicator. Table 9.1 illustrates our findings and is reasonably consistent with the retail hierarchy defined in the London Plan. These findings support the current retail hierarchy, but it will be necessary to monitor the position given the dense network of centres and considerable retail development coming forward in the near future. The exception is Hammersmith and Hounslow, with Hammersmith obtaining a higher rank position despite being defined as a lower order centre. More specifically, Hammersmith has been allocated more points based on comparison goods turnover, retailer requirements and convenience goods floorspace. The Blenheim Centre Phase 2 should help Hounslow claw back on this position enabling it to continue to maintain its role as a Metropolitan Centre over the forthcoming Plan Period. The ranking outlined in Table 9.1 does, however, set out the necessary baseline with which to assess impact and implement sensitivity testing when forecasting capacity.

Table 9.1: Benchmarking of West London Larger Centres

| Borough | Centre | Rank Score | Rank Position | Retail Hierarchy (London Plan) |
|------------------------|-----------------|------------|---------------|--------------------------------|
| Ealing | Ealing | 92 | 1 | Metropolitan |
| Hammersmith and Fulham | Hammersmith | 73 | 2 | Major |
| Hounslow | Hounslow | 70 | 3 | Metropolitan |
| Hounslow | Chiswick | 66 | 4 | Major |
| Ealing | Southall | 59 | 5 | Major |
| Hammersmith and Fulham | Fulham | 56 | 6 | Major |
| Hounslow | Feltham | 46 | 7 | District |
| Ealing | Acton | 41 | 8 | District |
| Hammersmith and Fulham | Shepherd's Bush | 40 | 9 | District |
| Ealing | Greenford | 33 | 10 | District |
| Hounslow | Brentford | 30 | 11 | District |
| Ealing | Hanwell | 21 | 12 | District |

- 9.6 It is important to note that the ranking of centres has been defined based on the current role and position of each centre. It does not take into account future development potential. The next stage of work should review opportunity sites and the implementation of capacity. Depending on the outcome of that analysis, some centres will enhance their position in the ranking, while others will fall. This will need to be monitored and updated throughout the forthcoming LDF period.

Smaller Study Centres

- 9.7 We have undertaken a similar process of benchmarking in respect of the smaller centres in West London against a range of quantitative indicators to assess their relative position and role. Due to their different roles and intended function they have been reviewed separately to the twelve major study centres discussed above. Again, this exercise aims to review existing definitions set out within the respective UDPs and ranks the centres based on scale, retail offer and performance, which in turn is used to inform the impact/sensitivity testing in later sections. The indicators used are as follows:

- Total Floorspace
- Number of Convenience Units
- Number of Comparison Units
- Number of Service Units
- Number of Vacant Units
- Vacancy Rate
- Pharmacy Representation
- Post Office Representation

9.8 The aim of this analysis is to give an indication of the relative performance, size and attraction of the smaller West London centres to enable an informed decision regarding the impact of commitments and schemes coming forward. The exercise puts the centres into context in parallel with the centre assessments appended as Volume 2 to this study. As such, the greater the amount of floorspace, number of units and the lower the vacancy rate, the higher the rank order. Appendix 9 (Volume 1) sets out the ranking of the centres on the basis of each indicator. The table below sets out the results of this analysis and where we believe the smaller centres sit in relation to each other.

Table 9.2: Benchmarking of West London Smaller Centres

| Borough | Centre | Rank Score | Rank Position |
|-------------------------------|----------------------------------|------------|---------------|
| Ealing | Northfields | 176 | 1 |
| Hammersmith & Fulham | King Street West | 169 | 2 |
| Ealing | South Ealing | 166 | 3 |
| Hammersmith & Fulham | Fulham Road | 158 | 4 |
| Hammersmith & Fulham | Uxbridge Road West | 156 | 5 |
| Hammersmith & Fulham | North End Road / West Kensington | 155 | 6 |
| Ealing / Hammersmith & Fulham | East Acton | 151 | 7 |
| Hounslow | Hounslow West | 147 | 8 |
| Hammersmith & Fulham | Parson's Green | 146 | 9 |
| Ealing | Pitshanger | 135 | 10 |
| Hammersmith & Fulham | Uxbridge Road East | 131 | 11 |
| Hammersmith & Fulham | Fulham High Street | 127 | 12 |
| Hammersmith & Fulham | Askew Road | 127 | 13 |
| Hammersmith & Fulham | Shepherd's Bush Road | 125 | 14 |
| Hounslow | Bedfont | 123 | 15 |
| Hounslow | Isleworth | 111 | 16 |
| Hammersmith & Fulham | Munster Road | 102 | 17 |
| Ealing | Northolt | 95 | 18 |
| Hammersmith & Fulham | Fulham Palace Road | 92 | 19 |
| Hammersmith & Fulham | Greyhound Road | 91 | 20 |
| Ealing | Perivale | 90 | 21 |
| Hammersmith & Fulham | Goldhawk Road | 90 | 22 |
| Ealing | West Way Cross | 82 | 23 |
| Hounslow | Cranford | 80 | 24 |
| Hounslow | Heston | 80 | 25 |
| Ealing | Park Royal | 75 | 26 |
| Hammersmith & Fulham | Wandsworth Bridge Road (North) | 71 | 27 |
| Hounslow | Hanworth | 67 | 28 |
| Hounslow | Old Isleworth | 61 | 29 |
| Ealing | Sudbury Hill | 59 | 30 |

| | | | |
|----------------------|----------------------|----|----|
| Hammersmith & Fulham | Dawes Road | 59 | 31 |
| Hammersmith & Fulham | Bloemfontein Road | 57 | 32 |
| Hammersmith & Fulham | Edwards Woods Estate | 51 | 33 |
| Hammersmith & Fulham | Blythe Road | 41 | 34 |

Summary

- 9.9 Based on a series of indicators, relating to scale and performance, we have benchmarked the twelve larger centres against each other. This process, developed through a rank scoring system, has endorsed the retail hierarchy defined in the London Plan (i.e. two metropolitan centres, four major centres, and six district centres). It is important to point out that the major and smaller centre ranking is based purely on quantitative indicators and is intended to inform the sensitivity testing and impact scenarios in later sections. It is not sufficient in itself to inform policy options relating to the retail hierarchy, but can be used to inform policy choices and recommendations in follow-on pieces of work. We undertook a similar benchmark process in respect of the smaller centres assessed within this study, again to underpin sensitivity testing within the quantitative capacity forecasting set out in later sections.

10. RETAIL FLOORSPACE CAPACITY: BASELINE ASSUMPTIONS

- 10.1 We have drawn on a combination of bespoke in-centre and household telephone interview surveys and existing published data to inform and develop our approach in assessing the capacity for additional retail floorspace. In this Section we set out the key assumptions and datasets underpinning our assessment of the baseline turnover and performance analysis of existing convenience and comparison retail floorspace. We also set out baseline capacity forecasts for convenience and comparison goods retailing based on constant market shares (i.e. assuming no new development). The model has reviewed convenience and comparison goods capacity at the global level (within the three West London Authorities), at a borough level, and for each of the twelve larger study centres.
- 10.2 Section 11 develops the quantitative model further, and reviews the implications of commitments on baseline capacity forecasts, and tests a series of growth and floorspace efficiency scenarios. Scenario testing is encouraged through current best practice to allow local authorities to plan positively in response to changing economic circumstances over the forthcoming LDF period. The influence of commitments and proposals coming forward are tested in detail, specifically in terms of the impact on shopping patterns, market shares and floorspace capacity outputs.
- 10.3 The results of the household telephone survey, and subsequent analysis of shopping patterns, have enabled us to estimate the level of “trade retention” and “leakage” for comparison and convenience goods in each Borough. For the purposes of this exercise, and to enable a review of flows of expenditure at the Borough level, we have used Zones which we consider represent a ‘best fit’ to Borough boundaries (see Plan 1). These Zones are as follows:
- London Borough of Ealing - Zones 4-10
 - London Borough of Hammersmith & Fulham - Zones 1-3
 - London Borough of Hounslow - Zones 11-17

Methodology

- 10.4 In developing our methodology through Section 10 and 11 of this study, we have drawn on established best practice and our extensive experience in this field. In particular, GVA Grimley are responsible for preparing the forthcoming DCLG Good Practice Guidance on *Retail/Leisure Need and Impact Assessments*. This identifies the importance of regional and sub-regional strategies and sets out a number of basic guiding principles:
- The need for a transparent methodology;
 - The need to use objective and up to date data inputs;
 - The need to justify the use of growth rates and key assumptions used in the analysis;

- The importance of identifying alternative options and objective testing.
- 10.5 Our overall methodology developed through Section 10 and 11 of this study, is based on best practice and a widely accepted step-by-step methodology. For example, we have:
- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the West London survey area;
 - Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis of the Household Telephone Survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales;
 - Estimated the turnover required to support committed retail schemes in the catchment area and calculated the trade draw from existing centres, thereby assessing consequent impact;
 - Assessed the cumulative impact of all committed retail schemes and reviewed the implications for identified capacity for the major West London centres, each West London Borough and globally in the three West London authorities.
- 10.6 As requested in the Study Brief, this quantitative assessment uses the survey results to forecast the potential residual retail spend and floorspace capacity available for new retailing up to 2016, and beyond to 2021. All figures set out in the capacity exercise are cumulative. Our assessment is based on five year periods (i.e. 2006 to 2011; 2011 to 2016; and 2016 to 2021) based on PPS6 advice and the Good Practice Guidance. It is important to point out that while the 2021 forecasts do provide a broad indication idea of growth, we have specifically focused on the period to 2016, due to growing margins of error beyond this point. As set out in best practice, it is important for local authorities to update need assessments towards the latter part of the LDF period to ensure accurate and robust projections with which to make informed development control and policy choices.

Internet Sales/E-Tailing

- 10.7 The future impact of E-tailing on the high street is uncertain, although there is growing published information on recent trends. According to Verdict (2006), the e-retail market has grown rapidly in recent years from just below £1.8b in 2000 to £8.2b in 2005 (a growth of 356%). Over the last five years rising numbers of consumers have installed Internet connections into their homes and increasing numbers of established retailers have launched online operations. The findings state that the e-retail market is still reasonably immature and therefore over the coming five years they expect it to continue to grow. As faster internet and broadband technology becomes the norm in many consumers' homes, online shopping will become easier, faster and more reliable, and this will drive growth in the market.
- 10.8 Electricals is the largest sub sector of online retail in the UK, now accounting for 23.8% of the online market. Despite being the second largest online market, food and grocery recorded rapid growth of 34.5% in 2005 taking its value to £1.86b. While Tesco continues to be by far the largest player in the sector, it now faces growing competition from Asda and, more recently, Sainsbury's. Clothing and footwear comprises the third largest online market, but with consumer requirements to 'look and feel', it has been the least affected comparison retail sector. In 2005, music and video was the fastest growth

sector with sales increasing by 36.1%, taking the total to £750m, with sales boosted by a surge in popularity for digital downloads. In contrast, book sales grew by only 16%, and DIY, the fastest growing online market in 2004, slowed markedly in 2005 to 17%.

- 10.9 As a consequence of this growth, there are huge pressures on retailers as the Internet has provided an attractive alternative for many consumers. Shoppers are selecting their own retail mix online and shopping centres need to compete with this choice, which is not only driven by price and range, but also service and expertise. Town centres will increasingly have to provide a retail experience that the Internet and supermarkets are unable to match, and the market will respond in some way to the varying impacts on different retail sectors. In accordance with PPS6, the emphasis should be on the overall town centre experience, the mix of uses, and not just the retail offer.
- 10.10 For the purposes of the West London quantitative capacity forecasting, we have deducted Special Forms of Trading (SFT), i.e. internet based sales, from expenditure per capita figures for convenience and comparison goods. Based on figures outlined by Experian Business Strategies (2006), we have deducted 0.9% from convenience goods expenditure, and 7.5% from comparison goods expenditure. It is important to point out that these figures may grow over the forthcoming LDF period. For example, recently published forecasts provided by Experian Business Strategies indicate that by 2015 e-tailing could account for up to 12.4% of comparison goods expenditure.
- 10.11 We have not undertaken scenario testing to assess the potential impact of the growth of e-tailing on the capacity for new convenience and comparison goods floorspace. We recommend that strategies for town centres should focus on enhancement, the mix of uses and overall visitor experience to compete effectively with the growing competition of the internet. It is difficult to predict the future, but at present investor confidence in town centres is strong. We nevertheless acknowledge that the capacity figures outlined throughout the remainder of this section, and in Section 11, could decline marginally as a consequence of the growth in internet sales. We therefore recommend that local authorities should follow the recommendations set out in PPS6, and update the evidence base and forecasting in the latter part of the LDF to take on board more detailed research evidence on the subject of SFT.

Catchment Area and Household Survey

- 10.12 In order to provide detailed information on the current shopping patterns in the West London Study Area, we specifically commissioned a new household telephone survey covering 3,000 households across 30 agreed survey zones, distributed proportionately to the population in each Zone. The survey and questionnaire was commissioned by GVA Grimley, and interviewing and data processing was undertaken by NEMs Market Research. The survey area plan is attached in Plan 1 (Volume 1).
- 10.13 London is a highly populated dense urban area with a complex network of centres and varied shopping patterns. Our methodology therefore considered a number of zones, of an appropriately small size, to cover the local level and effectively define the catchment areas of centres. This is crucial to ensure a robust evidence base in reaching findings and conclusions from the model to underpin the Local Development Framework.

- 10.14 The survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove inappropriate responses, such as 'internet/mail order shopping'. For convenience goods, the Household Telephone Survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weighting, which reflects the estimated proportion of expenditure accounted for by each type. For food we use a 75% / 25% main and top-up food weighting, which is widely accepted and used in retail studies, although not derived from the results of the Household Telephone Survey. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.
- 10.15 The survey also included seven questions on specific comparison goods types. These are based on the Experian Business Strategies definitions of comparison goods expenditure. The retail needs modelling exercise used the weighted averages of the Household Survey responses for each goods type as the basis for the proportion of per capita expenditure on that goods type. This process establishes the pattern of spending for residents of each zone in terms of the following types of goods:
- Clothes and shoes;
 - Furniture, floor coverings and household textiles;
 - DIY and decorating goods;
 - Domestic appliances;
 - Electronic/entertainment goods;
 - Personal/luxury goods;
 - Recreational goods.

Estimate of Population in the Survey Area

- 10.16 Population estimates and forecasts for each of the survey zones were derived from the Experian E-marketer in-house database. The need for consistent data sources for the study area as a whole was agreed and is viewed as the best mid-term estimates available at present. Experian provides estimates of population in 2006, 2011, 2016 and 2021, and data is based on trend line projections and the 2001 census for small, localised areas.
- 10.17 Overall, the population of the survey area is currently estimated to be 1,514,652. It is forecast to grow to 1,583,497 by 2011, 1,643,981 by 2016, and again to 1,708,640 by 2021. These figures represent a strong growth of 129,329 (8.5%) between 2006 and 2016; and circa 193,988 (13%) between 2006 and 2021.

Per Capita Expenditure Projections

- 10.18 The Experian E-marketer system also provides estimates of per capita expenditure for convenience and comparison goods in 2005 (2005 price base). We have necessarily made deductions for special forms of trading (SFT), as described above.
- 10.19 In terms of expenditure growth in West London, we have drawn on convenience and comparison goods growth rates provided by Experian Business Solutions, using the scenario discussed above. We have generated convenience and comparison expenditure by zone to highlight variations across the survey area and obtain more accurate turnover estimates.
- 10.20 In order to set spend per capita figures in context, we have compared the average spend in each of the three West London Authorities with the national average (Table 10.1). It is clear that spending potential on comparison goods is stronger than the UK average in each Borough, although the table shows that Hammersmith & Fulham is considerably higher. In the convenience goods category, the figures suggest that the spending potential is lower in Ealing and Hounslow compared to the UK average, but in Hammersmith & Fulham it is again considerably stronger. This broadly reflects the relative socio-economic characteristics of each Borough's population.

Table 10.1: Per Capita Expenditure – UK and West London Comparison 2006

| | Survey Area Zone 1-30 | UK Average | Ealing | Hammersmith & Fulham | Hounslow |
|-------------|--------------------------|------------|--------|-------------------------|----------|
| Comparison | £3,134 | £2,766 | £2,920 | £3,331 | £2,821 |
| Convenience | £1,661 | £1,586 | £1,574 | £1,717 | £1,543 |

Source: Experian E-Marketer Business Strategies

Total Available Expenditure

- 10.21 The next stage of the model applies per capita expenditure to population forecasts. It indicates that total available convenience goods expenditure within the West London survey area is currently £2,494m. This is forecast to grow to £2,712m by 2011, £2,923m by 2016 and again to £3,156m by 2021. This equates to an overall growth of £429m (17%) between 2006 and 2016, and £663m (27%) between 2006 and 2021.
- 10.22 Total comparison goods expenditure available in the catchment area in 2006 is approximately £5,158m, rising to £6,696m in 2011, £8,611m in 2016, and again to £11,092m by 2021. This equates to an overall growth of £3,452m (67%) between 2006 and 2016, and £5,933m between 2006 and 2021 (more than 115% growth).

Trade Retention / Leakage / Inflow

- 10.23 This step in the methodology enables us to calculate the levels of trade retention and leakage from the three London Boroughs. This assessment is crucial to help inform and understand the baseline performance of existing floorspace. The findings from the calculation underpin scenarios to enhance market share in conjunction with town centre strategies and identified development opportunities.
- 10.24 It is evident from our assessment that Hounslow has the highest level of trade retention within the borough for convenience goods, although it has a similar level of trade retention to Ealing BC for comparison goods. These figures include out-of-centre retail provision for food and non-food. It is apparent that each local authority is experiencing relatively high levels of trade leakage, despite Ealing and Hounslow being classed as higher order Metropolitan Centres. As we have seen in previous sections, this is a consequence of a strong network of key competing centres such as the West End and Kingston. Forecast baseline capacity projections discussed later in this section are based on current market shares – i.e. these levels of trade retention and leakage.
- 10.25 It is not possible to conclude ideal levels of trade retention/leakage from a catchment area. Retail distribution and shopping patterns are complex and changing all the time, and it is only possible to set out the current position, the influence of competing centres and retail destinations, and future threats to market share. The figures do illustrate opportunities to enhance market share, and it is only possible to review the positive impact new schemes will have once they come forward. Each scheme will need to be assessed on its own merits, scale and quality, and although the network of centres is more complex in London than elsewhere in the UK, there are more people to support existing and new retail floorspace.

*Table 10.2: Ealing BC Trade Retention and Leakage in Zone 4-10
Baseline Position Excluding Commitments*

| | Total Available Spend Zone 4-10 | Zone 4-10 Trade Retention £m | Zone 4-10 Market Share % | Zone 4-10 Trade Leakage £m |
|-------------|--|-------------------------------------|---------------------------------|-----------------------------------|
| Convenience | 443.0 | 275.6 | 62.2 | 167.4 |
| Comparison | 921.1 | 394.6 | 42.8 | 526.5 |

Convenience Goods: Based on 0.7% Expenditure Growth Rate

Comparison Goods: Based on 4.3% Expenditure Growth Rate

Note: Zone 4-10 is a best fit boundary to the London Borough of Ealing.

*Table 10.3: Hammersmith & Fulham BC Trade Retention and Leakage in Zone 1-3
Baseline Position Excluding Commitments*

| | Total Available Spend Zone 1-3 | Zone 1-3 Trade Retention £m | Zone 1-3 Market Share % | Zone 1-3 Trade Leakage £m |
|-------------|---|--|--|--|
| Convenience | 302.9 | 175.5 | 57.9 | 127.4 |
| Comparison | 658.0 | 203.9 | 31.0 | 454.1 |

Based on 0.7% Expenditure Growth Rate and Excluding Commitments

Comparison Goods: Based on 4.3% Expenditure Growth Rate

Note: Zone 1-3 is a best fit boundary to the London Borough of Hammersmith & Fulham

*Table 10.4: Hounslow BC Trade Retention and Leakage in Zone 11-17
Baseline Position Excluding Commitments*

| | Total Available Spend Zone 11-17 £m | Zone 11-17 Trade Retention £m | Zone 11-17 Market Share % | Zone 11-17 Trade Leakage £m |
|-------------|--|--|--|--|
| Convenience | 337.9 | 259.3 | 76.7 | 78.6 |
| Comparison | 685.1 | 283.9 | 41.4 | 401.2 |

Based on 0.7% Expenditure Growth Rate and Excluding Commitments

Comparison Goods: Based on 4.3% Expenditure Growth Rate

Note: Zone 11-17 is a best fit boundary to the London Borough of Hounslow

- 10.26 We have drawn on specially commissioned in-centre surveys to help define the extent of the catchment areas of the 12 larger centres in the three West London Authorities. The surveys enabled us to estimate the proportion of shoppers in the centres travelling from beyond the survey area boundary (i.e. the inflow of trade). Respondents comprised local residents, shoppers/visitors and people who work in the centres. Table 10.5 illustrates the levels of inflow to each centre, and enable us ensure that the full extent of retail turnover is taken in account within the forecasting model. While the results may be subject to some margins of error, they provide the best evidence available to review inflows of retail expenditure.

Table 10.5: Inflow of Trade from Beyond the Survey Area (Zones 1-30) to the Larger Centres

| Centre | Inflow % |
|-------------------|----------|
| 1. Ealing | 15.3% |
| 2. Hanwell | 13.0% |
| 3. Southall | 6.0% |
| 4. Acton | 7.4% |
| 5. Greenford | 2.1% |
| 6. Hammersmith | 23.5% |
| 7. Fulham | 17.2% |
| 8. Shepherds Bush | 28.3% |
| 9. Hounslow | 1.0% |
| 10. Chiswick | 5.1% |
| 11. Feltham | 7.1% |
| 12. Brentford | 9.2% |

- 10.27 It is apparent that public transport connections, and proximity to central London have a considerable impact on trade inflow. For example, the centres of Hammersmith, Fulham and Shepherd's Bush all have relatively high inflow levels as a consequence of their location within the dense urban area in close proximity to Central London and location on the tube and bus networks. It is apparent that the closer centres are to Central London and the central tube network, then the flows of shoppers are generally more extensive and fluid. In contrast, for example, Hounslow is further from Central London and relies instead on a more tightly defined car borne catchment, competing on a higher level with centres in the wider catchment area, such as Staines. The survey results show that the majority of respondents shopping in Hounslow were generally from only 3-4 postcode sectors.
- 10.28 On this basis, we consider the level of inflows obtained from the in-centre survey results do provide the best available indication of inflow into the survey area, reflecting the size of centre, location and public transport accessibility. Those centres located towards the outer boundary of the boroughs are likely to benefit more from inflow, but this also depends on the scale and retail offer in the centre. We have therefore incorporated the figures into the capacity forecasting model to ensure that the full levels of turnover in the 12 larger study centres is taken into account.

Comparison/Convenience Goods Turnover

- 10.29 Using the composite market shares derived from the Household Survey, and baseline expenditure estimates, we have calculated the comparison and convenience goods turnover of the West London centres and out-of-centre retail provision. This provides an objective measure of the current performance of each centre, a detailed analysis of each centre's catchment and shopping patterns, and role within the wider retail hierarchy. The turnover figures take into account trade retention and leakage drawn from the household telephone survey. For comparison goods, our estimates of trade inflow are informed by the in-centre surveys. This stage of the methodology determines the baseline position. This, in turn, underpins baseline capacity forecasts discussed later in this Section, and scenario testing outlined in Section 11.

Comparison Goods Market Share/Turnover

- 10.30 Table 10.6 highlights the comparison goods market share of each of the 12 major West London centres in the baseline position (i.e. at 2006 assuming no commitments). The figures reflect current trading patterns, and we outline each centres market share of available comparison goods expenditure within the 'best fit' borough zones as discussed above, and within each centre's location zone.

Table 10.6: West London Centres: Comparison Goods Market Share (%)

| Centre | Borough | Market Share (%) Within Best Fit Borough Zones | Market Share (%) Within Location Zone |
|-----------------------------------|----------------------|--|---|
| Ealing (Location Zone 5) | Ealing | 35.4 | 52.7 |
| Southall (Location Zone 10) | Ealing | 1.5 | 5.5 |
| Acton (Location Zone 4) | Ealing | 1.2 | 5.1 |
| Hanwell (Location Zone 6) | Ealing | 0.4 | 1.9 |
| Greenford (Location Zone 7) | Ealing | 2.1 | 4.7 |
| Hammersmith (Location Zone 2) | Hammersmith & Fulham | 17.8 | 27.1 |
| Fulham (Location Zone 1) | Hammersmith & Fulham | 9.0 | 20.7 |
| Shepherd's Bush (Location Zone 3) | Hammersmith & Fulham | 3.6 | 9.2 |
| Hounslow (Location Zone 14) | Hounslow | 21.1 | 40.0 |
| Feltham (Location Zone 13) | Hounslow | 3.1 | 10.6 |
| Chiswick (Location Zone 17) | Hounslow | 7.8 | 25.2 |
| Brentford (Location Zone 16) | Hounslow | 1.9 | 8.4 |

- 10.31 Table 10.7 highlights the comparison goods turnover of the major West London centres in the base year (2006) and forecast years of 2011, 2016 and 2021. These baseline turnover projections are underpinned by constant market shares and the assumption that existing shopping patterns will be maintained over the LDF period. In order to demonstrate the methodology of the model the figures outlined in this section incorporate a 4.3% annual expenditure growth rate and 2% per annum increase in sales efficiency of existing retail floorspace. We test alternative scenarios in later sections, but consider these projections to be appropriate and robust 'mid-range' estimates. Commitments have not been taken into account at this stage, and are again incorporated in the next stage of the methodology, outlined in Section 11.

Table 10.7: West London Centres – Comparison Goods Turnover by Centre (£m)

| Centre | Turnover 2006 | Turnover 2011 | Turnover 2016 | Turnover 2021 |
|-----------------|---------------|---------------|---------------|---------------|
| Ealing | 434.5 | 543.3 | 677.2 | 845.3 |
| Hammersmith | 227.1 | 295.2 | 381.2 | 492.4 |
| Hounslow | 201.7 | 255.1 | 323.0 | 408.5 |
| Chiswick | 114.5 | 144.1 | 180.9 | 227.3 |
| Fulham | 98.3 | 127.8 | 164.7 | 212.5 |
| Shepherd's Bush | 85.9 | 116.7 | 155.7 | 207.5 |
| Brentford | 30.8 | 38.6 | 48.3 | 60.5 |
| Acton | 30.1 | 38.7 | 49.6 | 63.5 |
| Southall | 27.3 | 34.6 | 43.9 | 55.7 |
| Feltham | 27.1 | 33.8 | 42.4 | 52.9 |
| Greenford | 22.6 | 28.3 | 35.5 | 44.6 |
| Hanwell | 5.5 | 6.8 | 8.5 | 10.7 |

Note: Includes Inflow Calculated from In-Centre Survey, October 2006

- 10.32 In addition to the town centres, there is a network of out-of-centre comparison goods retail warehousing throughout each of the three London Boroughs. These are illustrated on Plan set 3.
- 10.33 In Ealing, the results have considered the turnover of the Great Western Retail Park and the free-standing Wickes and Homebase units. On the basis of current market shares, we estimate that retail warehousing in the Borough currently has a comparison goods turnover of £46.9m. Based upon an existing retail floorspace of approximately 13,481 sq m net the results of the Telephone Survey suggest that collectively the units have a sales density of approximately £3,475 per sq m net. Based upon a company average sales density for the retail warehouse units combined of £2,235 per sq m net, our assessment indicates that retail warehousing in the London Borough of Ealing is performing particularly well.
- 10.34 In Hammersmith & Fulham we have assessed the performance of the Hurlingham Retail Park which comprises Currys and PC World. On the basis of current market shares, we estimate that retail warehousing in the Borough currently has a comparison goods turnover of £13.6m. Based upon an existing retail floorspace of approximately 3,761 sq m net, the results of the Telephone Survey suggest that the retail park has a sales density of approximately £3,611 per sq m net. Based upon a company average sales density for the retail warehouse units combined of £5,487 per sq m net, our assessment indicates that the Retail Park is under-performing.
- 10.35 Hounslow has the greatest amount of out-of-centre retail warehouse floorspace. Our assessment includes the Apex Retail Park, the Ivy Bridge Retail Park, the Manor Lane Retail Park and ten free-standing out-of-centre retail warehouses including the B&Q store at Chiswick and Homebase stores in Feltham and Brentford. On the basis of current market shares, we estimate that out-of-centre retail warehousing in the Borough currently has a comparison goods turnover of £91.4m. This figure equates to circa 13% of total available comparison goods expenditure within Zone 11-17, i.e. the Zones that broadly correspond to the London Borough of Hounslow.

- 10.36 Based upon existing retail floorspace of approximately 31,842 sq m net the results of the Telephone Survey suggests that collectively retail warehousing in Hounslow Borough has a sales density of approximately £2,871 per sq m net. Based upon a company average sales density for the retail warehouse units in the Borough of £2,893 per sq m net, our assessment indicates that retail warehousing in the Borough is performing in line with expected company averages.

Convenience Goods Turnover

- 10.37 Addressing each town centre and out-of-centre destination in turn, we have reviewed shopping patterns and the performance of existing convenience goods floorspace. Using the composite market shares derived from the Household Survey, and baseline expenditure estimates, we have calculated the convenience goods turnover of town centres and out-of-centre retail provision. Our analysis reviews the performance of foodstores through a comparison with expected company average sales densities, in accordance with PPS6.
- 10.38 Table 10.8 highlights the convenience goods market share of each of the 12 major West London centres in the baseline position, i.e. 2006 assuming no commitments. The figures reflect current trading patterns, and we outline the centre's market share of available comparison goods expenditure within the 'best fit' borough zones and within each centre's location zone.

Table 10.8: West London Centres: Convenience Goods Market Share (%)

| Centre | Borough | Market Share (%) Within Best Fit Borough Zones | Market Share (%) Within Location Zone |
|-----------------------------------|----------------------|--|---|
| Ealing (Location Zone 5) | Ealing | 25.8 | 54.2 |
| Southall (Location Zone 10) | Ealing | 2.2 | 12.1 |
| Acton (Location Zone 4) | Ealing | 8.6 | 46.7 |
| Hanwell (Location Zone 6) | Ealing | 1.5 | 6.7 |
| Greenford (Location Zone 7) | Ealing | 6.9 | 12.2 |
| Hammersmith (Location Zone 2) | Hammersmith & Fulham | 9.4 | 19.7 |
| Fulham (Location Zone 1) | Hammersmith & Fulham | 17.6 | 38.0 |
| Shepherd's Bush (Location Zone 3) | Hammersmith & Fulham | 3.4 | 8.0 |
| Hounslow (Location Zone 14) | Hounslow | 3.0 | 12.8 |
| Feltham (Location Zone 13) | Hounslow | 10.6 | 54.7 |
| Chiswick (Location Zone 17) | Hounslow | 20.2 | 76.9 |
| Brentford (Location Zone 16) | Hounslow | 3.4 | 38.0 |

- 10.39 The floorspace and detailed breakdown of provision in each town centre and out-of-centre location is attached in Appendix 15, split by Borough. The trade draw of the convenience stores in each town centre is made up of main food and top-up food shopping, and 'other' town centre foodstores include all other units in the town centre selling convenience goods including bakers, butchers and greengrocers.
- 10.40 Some major food superstores towards the outer boundary of the three London Boroughs may have a very limited inflow of expenditure (such as for example, Tesco Extra in Southall and Tesco Extra in Twickenham). We believe, however, that the full survey area (Zone 1-30) is drawn wide enough to pick

up foodstore catchment areas. In our experience, and given the dense urban area and extensive distribution of food shopping destinations, residents living beyond Zone 1-30, which extends further than borough boundaries, are unlikely to travel to food shopping provision in the boroughs.

- 10.41 Table 10.9 below, sets out the convenience goods turnover of each of the 12 larger centres, excluding out-of-centre floorspace, and forms the baseline position with which to assess the impact of commitments coming forward and sensitivity testing. A range of growth rates have been tested, and discussed in more detail in Section 11, but here we outline turnover figures based on a 0.7% growth rate as an example.

Table 10.9: West London Centres – Convenience Goods Turnover by Centre (£m)

| Centre | Turnover 2006 | Turnover 2011 | Turnover 2016 | Turnover 2021 |
|-----------------|---------------|---------------|---------------|---------------|
| Ealing | 119.9 | 125.6 | 130.9 | 136.7 |
| Chiswick | 97.6 | 102.4 | 107.0 | 112.1 |
| Fulham | 64.4 | 69.6 | 74.9 | 80.6 |
| Acton | 43.5 | 46.0 | 48.4 | 51.0 |
| Feltham | 39.5 | 41.3 | 43.5 | 45.6 |
| Hammersmith | 35.7 | 39.0 | 42.3 | 45.8 |
| Greenford | 32.2 | 33.7 | 35.4 | 37.1 |
| Shepherd's Bush | 20.8 | 23.6 | 26.3 | 29.4 |
| Brentford | 13.8 | 14.4 | 15.1 | 15.7 |
| Hounslow | 10.9 | 11.5 | 12.2 | 12.9 |
| Southall | 10.1 | 10.7 | 11.4 | 12.1 |
| Hanwell | 7.9 | 8.3 | 8.6 | 9.0 |

- 10.42 We estimate the total convenience goods turnover in Ealing Borough Council, including out-of-centre floorspace is currently £332m. Based on a total floorspace of circa 38,133 sq m net, Ealing Borough currently has an average convenience goods sales density of £8,709 per sq m net. This is higher than our estimate of company sales densities for the principal and local foodstores in the Borough (£6,668 per sq m net), indicating that convenience goods floorspace is performing well.
- 10.43 We estimate that the total convenience goods turnover in Hammersmith & Fulham Borough Council, including out-of-centre floorspace, is currently £215.6m. Based on a total floorspace of circa 26,539 sq m, Hammersmith & Fulham currently has an average convenience goods sales density of £8,124 per sq m net. This is higher than our estimate of company average sales densities for the principal and local foodstores in the town centre (£7,192 per sq m net), indicating that convenience goods floorspace in the borough is performing well.

- 10.44 We estimate that the total convenience goods turnover in Hounslow Borough Council, including out-of-centre floorspace, is currently £385.8m. Based on a total floorspace of circa 40,715 sq m net, Hounslow Borough currently has an average convenience goods sales density of £9,475 per sq m net. This is higher than our estimate of company average sales densities for the principal and local foodstores in the Borough (£8,145 sq m net), indicating that convenience goods floorspace in the borough is performing well.
- 10.45 In accordance with PPS6, we have reviewed the performance of retail floorspace within our methodology to generate capacity projections. It is evident that foodstores in each of the three West London Boroughs are currently performing well which indicates a need for additional floorspace to absorb this expenditure. When making development control and policy decisions, however, local authorities must take into account other factors such as site availability, impact and other planning considerations. Over-trading/quantitative considerations alone do not justify additional floorspace, and applications must comply with the tests set out in PPS6, and other material planning considerations.

Baseline Capacity Forecasts

- 10.46 Building on the baseline position discussed above, we have explored the capacity for further convenience and comparison retail floorspace at the global level (i.e. within the three West London Authorities), by Borough and within each of the 12 larger study centres. This will enable the authorities to test alternative options for the spatial distribution of new development between the West London centres in the next stage of work.
- 10.47 By forecasting at a Borough level, the local authority can make informed policy choices about where that capacity should be met depending on a whole range of other considerations such as site availability. Capacity arising in a specific centre does not necessarily mean that the identified capacity should be met within that centre. A more appropriately located site in a nearby centre may encourage, for example, more sustainable travel patterns. We do, however, set out capacity by centre to indicate the general location of where need should be met in the first instance.

Comparison Goods

- 10.48 In order to translate residual comparison goods expenditure into floorspace, we have assumed a sales density on average of £5,500 per sq m net in 2006. We have reviewed the capacity for additional comparison goods floorspace in each of the 12 major West London town centres based on current market shares, and have reviewed the Borough wide capacity and a global capacity for the three West London authorities. Table 10.10 below illustrates capacity using a 4.3% expenditure growth rate, and a 2% sales efficiency rate. These figures are based on current market shares and assume no commitments (i.e. this is the baseline position prior to scenario testing and impact analysis).

Table 10.10: Future Comparison Goods Floorspace by Centre (sq m net)

| Centre | 2011 | 2016 | 2021 |
|-----------------|--------|--------|--------|
| Ealing | 10,469 | 22,007 | 35,190 |
| Hammersmith | 7,328 | 15,578 | 25,228 |
| Hounslow | 5,328 | 11,510 | 18,506 |
| Shepherd's Bush | 3,595 | 7,603 | 12,410 |
| Fulham | 3,168 | 6,689 | 10,830 |
| Chiswick | 2,913 | 6,169 | 9,893 |
| Acton | 910 | 1,926 | 3,112 |
| Brentford | 758 | 1,607 | 2,572 |
| Southall | 743 | 1,595 | 2,567 |
| Feltham | 633 | 1,395 | 2,232 |
| Greenford | 557 | 1,197 | 1,919 |
| Hanwell | 129 | 272 | 435 |

- 10.49 It is evident from our assessment that sales densities for the larger centres of Ealing, Hammersmith, Fulham, Shepherd's Bush, Hounslow, Chiswick and Brentford are relatively high. This is likely to be for a number of reasons. First, the floorspace used within the model is the defined policy boundary and additional floorspace beyond this that effectively also forms the 'shopping area' may absorb expenditure which would in turn dilute higher than expected sales densities. Second, the household telephone survey is often biased towards the larger centres as destinations where people undertake 'most of' their non-food shopping, but in reality a proportion of their comparison goods expenditure will be spent in smaller and other centres. Third, it is not unexpected that town centres in London trade at higher levels given the dense urban area and high population.
- 10.50 Table 10.11 outlines global capacity forecasts for additional comparison goods floorspace by local authority. Again, this is based on current market shares, assumes no new commitments, and incorporates a 4.3% growth rate, and 2% sales efficiency. These figures incorporate the performance of out-of-centre retail warehousing throughout each of the three West London Boroughs.

Table 10.11: Future Comparison Goods Floorspace Capacity by Local Authority (sq m net)

| Centre | 2011 | 2016 | 2021 |
|----------------------|--------|--------|--------|
| Ealing | 14,260 | 30,093 | 48,227 |
| Hammersmith & Fulham | 14,531 | 30,799 | 49,972 |
| Hounslow | 12,043 | 25,853 | 41,517 |

Convenience Goods

- 10.51 In order to translate residual convenience goods expenditure into floorspace, we have assumed two variations of sales density. The first equates to the general performance of the major food superstore operators, which would aim to achieve in the region of £12,000 per sq m net in 2006. The second

equates to the general performance of the smaller and discount retailers, which would aim to achieve in the region of £4,000 per sq m net in 2006.

- 10.52 Building on these two variations, we have reviewed the capacity for additional convenience goods floorspace in each of the twelve major West London town centres based on current market shares, and have reviewed the Borough wide capacity and a global capacity for the three West London authorities. Table 10.12 below illustrates capacity using a 0.7% expenditure growth rate, and a 0% sales efficiency rate. Again, we test alternative growth and efficiency scenarios in Section 11. These figures are based on current market shares and assume no commitments, i.e. this is the baseline position prior to scenario testing and impact analysis.

Table 10.12: Convenience Goods Floorspace Capacity by Centre (sq m net)

| Centre | 2011 | | 2016 | | 2021 | |
|-----------------|-----------------|------------------|-----------------|------------------|-----------------|------------------|
| | £4,000 per sq m | £12,000 per sq m | £4,000 per sq m | £12,000 per sq m | £4,000 per sq m | £12,000 per sq m |
| Ealing | 17,105 | 5,702 | 18,431 | 6,144 | 19,885 | 6,628 |
| Hanwell | 931 | 310 | 1,025 | 342 | 1,125 | 375 |
| Southall | -3,085 | -1,028 | -2,909 | -970 | -2,731 | -910 |
| Acton | 3,481 | 1,160 | 4,084 | 1,361 | 4,739 | 1,580 |
| Greenford | 3,726 | 1,242 | 4,155 | 1,385 | 4,585 | 1,528 |
| Hammersmith | 1,811 | 604 | 2,625 | 875 | 3,512 | 1,171 |
| Fulham | 8,123 | 2,708 | 9,431 | 3,144 | 10,855 | 3,618 |
| Shepherd's Bush | -1,723 | -574 | -1,041 | -347 | -290 | -97 |
| Hounslow | -787 | -262 | -615 | -205 | -436 | -145 |
| Feltham | -10,280 | -3,427 | -9,726 | -3,242 | -9,192 | -3,064 |
| Chiswick | 13,529 | 4,510 | 14,700 | 4,900 | 15,960 | 5,320 |
| Brentford | 894 | 298 | 1,057 | 352 | 1,227 | 409 |

- 10.53 Table 10.13 outlines global capacity forecasts for additional convenience goods floorspace by local authority. Again, this is based on current market shares, assumes no new commitments, and incorporates a 0.7% growth rate, and 0% sales efficiency. These figures include the performance of out-of-centre foodstores throughout each of the three West London Boroughs.

Table 10.13: Future Convenience Goods Floorspace Capacity by Local Authority (sq m net)

| Centre | 2011 | | 2016 | | 2021 | |
|----------------------|-----------------|------------------|-----------------|------------------|-----------------|------------------|
| | £4,000 per sq m | £12,000 per sq m | £4,000 per sq m | £12,000 per sq m | £4,000 per sq m | £12,000 per sq m |
| Ealing | 23,774 | 7,925 | 28,141 | 9,380 | 32,787 | 10,929 |
| Hammersmith & Fulham | 10,966 | 3,655 | 15,754 | 5,251 | 20,945 | 6,982 |
| Hounslow | 19,118 | 6,373 | 24,958 | 8,319 | 31,087 | 10,362 |

Summary

- 10.54 In this section, we have set out the key assumptions and data sets used to reach the baseline turnover and performance analysis of existing convenience and comparison retail floorspace. In order to provide detailed information on current shopping patterns in West London, we specifically carried out a new household telephone survey covering 3,000 households across 30 agreed survey zones. The survey results identified the shopping habits of households for both convenience and comparison goods.
- 10.55 Overall, the population of the survey area is currently 1,514,652, and is forecast to grow to 1,643,981 by 2016, and again to 1,708,640 by 2021. Convenience goods expenditure within the survey is expected to increase from £2,494m in 2006 to £3,156m in 2021 (27% growth). This is based on a 0.7% growth rate. In the comparison sector, higher growth rates illustrate that spending will increase from £5,158m in 2006 to £11,091m in 2021, based on a 4.3% growth rate. This equates to an overall growth of £6bn between 2006 and 2021 (more than 115% growth).
- 10.56 It is clear that all three Boroughs are experiencing relatively high levels of trade leakage, particularly in the comparison sector. In Ealing, convenience floorspace is retaining 62.2% of trade, in Hammersmith & Fulham the figure is lower at 57.9%, but in Hounslow the figure is higher at 76.7%. In the comparison sector, Ealing is retaining 42.8% of trade, Hammersmith & Fulham is retaining 31%, and Hounslow is retaining 41.4%.
- 10.57 It is important to point out that baseline capacity forecasts set out in this section are based on constant market shares, and it is perfectly reasonable for authorities to bring forward proposals to enhance market share and support more floorspace than identified in capacity forecasts. It is also reasonable to predict that in a 'do nothing' scenario market shares will fall and centres will decline. This point is explored further in the next Section.
- 10.58 Baseline capacity forecasts indicate that by 2016, Ealing Borough could support 30,093 sq m net of additional comparison goods floorspace, Hammersmith & Fulham could support 30,799 sq m net, and Hounslow Borough could support 25,853 sq m net. These figures are based on constant market shares and exclude commitments. We have outlined capacity by centre, but Borough forecasts enable the authorities to make policy choices about the most appropriate location to implement floorspace. While the centre forecasts highlight the 'general' location where need should be met, other factors do need to be taken into consideration such as site availability and qualitative factors. It may be more appropriate to re-direct centre capacity to nearby alternative centres.

11. RETAIL FLOORSPACE CAPACITY: COMMITMENTS/SCENARIO TESTING

- 11.1 Section 10 developed the baseline capacity provision, assuming no commitments and constant market shares. This section develops the quantitative model further and tests alternative expenditure growth and sales efficiency scenarios and the impact of commitments on shopping patterns, market shares and capacity forecasts. As we have already described, scenario testing is encouraged through best practice and national guidance. It specifically helps local authorities to plan positively in response to changing economic circumstances over the forthcoming LDF period.
- 11.2 In this section we first describe the scale and composition of commitments coming forward; and second, we explain how we have considered the impact of commitments through the quantitative model. A key part of assessing impact is a consideration of trade draw to new schemes, and it is therefore essential to have a qualitative understanding of the scale and composition of schemes and the scale and health of the network of centres in the three West London Authorities. As such we have drawn on the qualitative assessments of centres and benchmarking exercise to assist in determining quantitative impact. For example, White City will have a greater impact on the larger Metropolitan Centres, as they are of a similar scale and have a similar retail and leisure offer.
- 11.3 We then test a range of expenditure growth and sales efficiency rates and outline how these influence the capacity forecasts with commitments incorporated. It is important for local authorities to adjust to changing circumstances when they arise and this provides the robust evidence base with which to do that. We outline clearly capacity forecasts for additional convenience and comparison goods floorspace after commitments have been taken into consideration. Finally, the study brief requested we test two further scenarios assuming considerable residential development in Southall and Brentford, and the implications of the new population on available expenditure and capacity forecasts. We discuss the implications of capacity forecasts and the flexibility with which they must be considered to inform policy and development control choices, and town centre strategies.

Comparison Goods Floorspace Commitments

- 11.4 We have examined the implications of commitments falling within the vicinity of the study area on the basis that they will be implemented by 2011. We have drawn on various data sources to assess commitments including discussions with the three West London Authorities, the Montagu Evans Retail Assessment in support of the White City mezzanine planning applications, and Roger Tyms independent critique of the Montagu Evans Retail Assessment.
- 11.5 Some commitments discussed are now open for trading, but only very recently and they had not therefore developed established trading patterns at the time of the household telephone survey. It has therefore been necessary to also consider the impact of these recently opened schemes. Accordingly, we have reviewed the following key commitments/proposals:

- White City committed retail floorspace (committed, under construction, not yet open);
- White City application for additional mezzanine floorspace (decision outstanding);
- Blenheim Centre Phase 1, Hounslow (open and trading);
- Blenheim Centre Phase 2, Hounslow (currently being re-negotiated);
- Central Square, Wembley (committed, not yet open);
- Quintain, Wembley (committed, not yet open);
- Longford Shopping Centre, Feltham (open and trading).

- 11.6 Perhaps the most significant scheme scheduled to come on line over the forthcoming LDF period is **White City**, in Shepherds Bush. It is a retail led mixed used development by Westfield Shopping Limited, and will provide an extension to Shepherd's Bush town centre. The scheme is currently under construction on the basis of two outline planning consents granted in 1996 and 2002. There is now a requirement from Westfield for additional retail floorspace which will be considered through two Section 73 applications to amend restrictive floorspace conditions and which would result in an additional 18,500 sq m of retail floorspace taking the total from 92,273 to 110,773 sq m gross.
- 11.7 In terms of scale and retail offer, the scheme will be equivalent to a Metropolitan Centre and the borough has made representations to the GLA to upgrade the status of Shepherd's Bush. The design of White City will be based upon four main anchor stores at the corner of each development. These will be complemented by a range of major store units together with a mix of other comparison goods retailers, principally selling clothing and fashion goods, but also with a convenience element and food and drink uses. In terms of scenario testing we have tested the current commitment and the impact of the proposed mezzanine floorspace.
- 11.8 The **Blenheim Centre** is located in the heart of Hounslow town centre. Phase 1 of the redevelopment opened in October 2006 and is anchored by a 6,435 sq m gross Asda foodstore. The scheme also includes 334 private residential units, 150 affordable units, a health and fitness centre, a health centre and hotel. When built, Phase 2 of the scheme will include 13,365 sq m gross of additional retail floorspace, A3 and A2 uses, a multiplex cinema, a crèche and B1 office space. We understand from the London Borough of Hounslow that phase 2 of the scheme is currently being re-negotiated, but we have retained these figures for the purposes of this assessment which gives a broad indication of the impact of a new scheme in the town centre.
- 11.9 **Central Square, Wembley**, is a redevelopment of the existing shopping centre owned by St Modwen Properties. Development will include a complete refurbishment of the Wembley Central Square car park and footbridge across the railway tracks. The scheme will incorporate circa 3,209 sq m of redeveloped existing retail floorspace, and 7,440 sq m of new retail and A3 food and drink uses. We understand that TK Maxx is to anchor the new shopping centre, and other retailers include Somerfield, Iceland, Holland & Barrett and Totesport.
- 11.10 The out of centre **Quintain development** around Wembley Stadium was granted planning permission in January 2006 and will comprise a major mixed-use scheme covering 42 acres of land. The development
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will create a new and vibrant district integrated with Wembley as a whole and included as part of any potential eastward extension of the town centre. The scheme will comprise circa 40,000 sq m of retail floorspace as well as residential, leisure and hotel/s. The scheme has specifically targeted a niche retail offer, and it is thought that the designer outlets, boutique retailing and sports related products will complement the town centre's offer.

- 11.11 The **Longford Shopping Centre in Feltham** had recently opened for trading. It had only just opened, and a number of units were not yet open for trading at the time of the telephone survey. Trading patterns had not settled, and the performance of the retail floorspace was still in the early stages. As such, we have included it as a commitment to review the full effects of the shopping centre once trading patterns develop and settle down fully. Feltham's 1960's shopping centre has been redeveloped for a mix of uses including 46,450 sq m (500,000 sq ft) of retailing, leisure facilities, offices and housing, and a 7,446 sq m (88,000 sq ft) food superstore.
- 11.12 The Study Brief also requested we consider the implications of proposals coming forward on the **Southall Gas Works** within Ealing Borough. Although not a commitment, we accept that the proposals are moving forward, and the site is allocated for development. It is a large brownfield site located to the west of Southall town centre. The site is bound by the railway line and Beaconsfield Road, and SecondSite Property and Castlemore Securities wish to regenerate this former industrial site. The current mixed-use application comprises 15,000 sq m gross of retail floorspace consisting of 3,331 sq m net of convenience floorspace and 8,675 sq m net of comparison floorspace. The application also includes 4,000 sq m of leisure and entertainment uses and approximately 4,500 residential units. Discussions are, however, ongoing and evolving.
- 11.13 The application/proposals are currently under consideration by the London Borough of Ealing, and both the Council and the GLA are concerned about the quantum of retail floorspace and the impact on Southall town centre. We test the scale of the development (current application outlined above) and implications for the network of centres. Depending on tenant mix, we consider that retail development on this out of centre site could have significant detrimental impact on Southall town centre. As we have set out in our qualitative assessment of Southall town centre it's retail offer is currently dominated by independent and ethnic retailers. As part of the next steps, we recommend that opportunities are explored to introduce more 'mainstream' multiple retailers into the town centre to better serve its second and third generation residents, whilst also maintaining and improving its unique ethnic offer.
- 11.14 Any application for the Southall Gas Works should be assessed independently once full details of retail floorspace (in terms of quality and scale) is clearly set out. In particular, the impact on Southall town centre should be reviewed in detail. It is apparent that concerns have been raised in respect of linkages with the town centre and consequent transfer of trade from the town centre to the Gas Works site. For the purposes of this study we have reviewed the turnover of a proposed scheme and reviewed where the Gas Works development would draw its trade from. In reality, this floorspace figure is likely to change in any subsequent planning applications but this figure provides an indication of the implications of a scheme on capacity in Southall and the centres in the three West London Authorities.
- 11.15 We have reviewed the positive impact/uplift of Southall's wider 'urban area' and the implications of this on overall capacity in Zone 10, and impact on other centres within the three West London Authorities.
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This highlights the claw back to Zone 10 and Southall's urban area following the implementation of the proposed Gas Works scheme. We have not tested the specific impact on Southall town centre, and recommend that the Council critiques any proposals/applications in detail when more information is available. Impact can only be clearly identified once a detailed scheme is available for consideration. This piece of work has reviewed the implications of the Gas Works site on capacity in Southall's urban area (i.e. the town centre and Gas Works site) and the other larger centres in the three West London Authorities.

- 11.16 Within the catchment area of the three West London Authorities, schemes are also being promoted in Kingston and Brent Cross. The proposed development at **Kingston town centre** has UDP support and retail studies have been undertaken that support the allocation for additional retail floorspace in the town centre. The proposed development is likely to result in an additional 46,000 sq m gross of comparison retail floorspace (32,200 sq m net).
- 11.17 We understand that if the scheme in Kingston goes ahead construction will not commence until the later stages of the LDF period (i.e. 2015). As such we have not considered the quantitative impact of this scheme within our figures. It is evident from previous sections, however, that Kingston is already considerably influential in the West London catchment area, and an improvement in retail offer will certainly increase trade leakage to Kingston.
- 11.18 Similarly, the proposed **Brent Cross extension** is also supported in the UDP and benefits from the recently adopted Cricklewood, Brent Cross and West Hendon Development Framework. The development proposed seeks to create a new Brent Cross town centre and envisages, amongst other things, an additional 55,000 sq m gross additional comparison floorspace (38,500 sq m net). Like Kingston, we have not incorporated the scheme into the quantitative model. Taking into account the initial planning application, reserved matters approvals, a requirement for compulsory purchase and then time required for construction, we envisage an opening date towards the latter half of the LDF period.
- 11.19 Both Kingston and Brent Cross will have an impact on the West London centres in the latter part of the LDF period, and an up-to-date review of retail need should be undertaken to continue to monitor schemes coming forward. They do represent a threat to the West London centres, and the enhancement of the larger West London centres should therefore be encouraged to maintain, or even improve market share.

Impact of Comparison Goods Floorspace Commitments

- 11.20 The White City Retail Assessment for additional Mezzanine Floorspace was produced in July 2006. A decision has not yet been made in relation to this planning application. Within the Retail Assessment, the cumulative impact of the White City proposals as well as a range of major commitments in the West London sphere of influence were tested. These include Central Square, Wembley; Quintain, Wembley; The Blenheim Centre Phase 1, Hounslow; and Longford Shopping Centre, Feltham.
- 11.21 In October 2006, Roger Tym & Partners (RTP) were commissioned by Hammersmith & Fulham Borough Council to provide an independent assessment of the Retail Assessment prepared by Montagu Evans in support of the two mezzanine floorspace planning applications. We have drawn on the conclusions of

this council commissioned study to inform our review of the impact of White City on capacity projections. In summary, RTP conclude that the weighting used in calculating the cumulative impact of White City and other development is acceptable. They state that the Retail Assessment produced by Montagu Evans is sufficiently robust and even adjusting the data inputs to provide an alternative set of trade diversion figures does not provide a materially different result. RTP explain that the key impact issue to consider is that of cumulative impact and given previous permissions which will already result in impacts on the town centres in the catchment area, it is their view that the additional cumulative impact that will result from the proposed development is not unacceptable.

- 11.22 It is also necessary, however, as part of the West London Retail Study to incorporate further commitments that were not considered in the Montagu Evans Retail Assessment. As such, we have also incorporated the positive impact of the Blenheim Centre, Hounslow, Phase 2; and the Southall Gasworks retail scheme in Southall. Also, whilst the Montagu Evans Study assessed the negative impact of the Longford Shopping Centre in Feltham on the network of centres, it did not assess the positive impact that the Shopping Centre would have on Feltham. Feltham falls outside the White City defined study area. As such, we have also modelled the positive impact on market share and turnover of the Longford Shopping Centre on Feltham.
- 11.23 Within our independent assessment of the impact of the Southall Gasworks, and schemes in Hounslow and Feltham, the forecast pattern of trade draw arising from the implementation of these schemes is anticipated to largely mirror the existing pattern of trade draw to these locations. As such, our assessment not only examines the positive impact of the committed schemes on the relevant town centres, but also examines the implications of identified commitments on the rest of the network of centres in the three West London authorities. In Southall, the Gas Works site is out of centre and proposals are still evolving. As such we have reviewed the impact of proposed retail floorspace on the network of centres, but reviewed the uplift in market share in Zone 10 (which comprises the town centre and Southall Gas Works). This is discussed in more detailed later in this section. The figures illustrate how market shares will change in each of the major town centres in West London from 2011 onwards and how this will impact on the trade draw of each centre.
- 11.24 These figures feed through to the economic capacity projections incorporating all commitments, first, at the global level, second, within each London Borough and third, within each of the twelve major town centres. The figures demonstrate how much the market shares need to increase in each centre to support the commitments identified, i.e. a positive impact, and where the trade will be derived from resulting in a decrease in market share in other centres, i.e. a negative impact.
- 11.25 It is clear that the new schemes discussed in this section will uplift market share and have a positive impact on turnover in those centres where new schemes are proposed, but this will result in impact on other centres in the network. In Southall, however, the Gas Works site is likely to have an impact on the town centre although the extent of this is not yet known as proposals are still at the discussion stage. As set out earlier in this section, we have reviewed the uplift in market share in Zone 10 (which comprises both Southall town centre and the Gas Works site) based on an example scheme to analyse the implications for capacity across the three West London Authorities.

- 11.26 The summary of comparison goods capacity forecasts with and without commitments is attached in Appendix 14, and demonstrates how commitments will impact upon capacity for additional comparison goods floorspace in each centre. Table 26, Appendix 13, summarises the impact of the key proposals and commitments in £m and % terms on the West London Centres.
- 11.27 Table 11.1 illustrates comparison goods capacity in each of the 12 larger centres after commitments have been taken into consideration. To enable comparisons with figures set out in Section 10 (the baseline position), we have assumed a sales density on average of £5,500 per sq m net in 2006 for new floorspace. We have reviewed the capacity for additional comparison goods floorspace in each of the 12 major West London town centres based on changes in market shares, and have reviewed the Borough wide capacity and a global capacity for the three West London authorities.
- 11.28 Table 11.1 below illustrates capacity using a 4.3% expenditure growth rate, and a 2% per annum growth in the sales efficiency rate. The final column sets out our summary of impact on town centre turnover, whether positive or negative, on the centre.

Table 11.1: Comparison Goods Floorspace Capacity by Centre (sq m net)

| Centre | 2011 | 2016 | 2021 | Impact on Town Centre Turnover % |
|-------------------|-------|--------|--------|----------------------------------|
| Shepherd's Bush | 5,090 | 25,367 | 49,365 | +654.5 |
| Hounslow | 4,486 | 12,370 | 21,293 | +28.3 |
| Hammersmith | 3,032 | 10,559 | 19,366 | -11.6 |
| Fulham | 1,809 | 5,119 | 9,016 | -7.8 |
| Chiswick | 969 | 3,927 | 7,311 | -8.6 |
| Acton | 789 | 1,788 | 2,955 | -2.0 |
| Ealing | 280 | 10,423 | 22,020 | -13.4 |
| Hanwell | 54 | 189 | 341 | -7.6 |
| Brentford | 14 | 767 | 1,626 | -12.9 |
| Greenford | -176 | 362 | 968 | -16.1 |
| Southall (Note A) | -271 | 1,741 | 4,040 | +143 |
| Feltham | -887 | 429 | 1,870 | +80.1 |

Note A:- Residual expenditure in Southall's urban area comprising the town centre and Southall Gas Works potential +10,000 population. The next steps will be required to review in detail the impact of a proposed scheme on Southall town centre. The figures in Table 11.1 reflect the uplift in market share in Zone 10.

- 11.29 Capacity forecasts by centre outlined above are based on changes to market share following the implementation of commitments. As we have already explained, market shares either rise or fall depending on where the schemes are implemented. It is important to point out, however that these should not be taken as a restriction to new development, nor do they provide the final 'answer'. Circumstances will continue to change as new schemes come forward and these figures should be

viewed as fluid and subject to change as circumstances evolve. Indeed, market share and capacity may continue to fall in some centres, or market share and capacity may rise if new proposals come forward.

- 11.30 Retail development throughout London will almost certainly continue and the capacity forecasts and market share changes should be viewed both as a threat to the health of town centres and as an opportunity to enhance/regenerate town centres and maintain/uplift their position in the retail hierarchy. Appendix 16 outlines how the commitments will impact upon market shares first globally, second by Borough and third by centre, and demonstrates the risks of decline in many of the West London town centres.
- 11.31 Table 11.2 outlines global capacity forecasts for additional comparison goods floorspace by local authority. These forecasts are based on changes to market shares, incorporate all comparison goods commitments, and uses a 4.3% growth rate, and 2% sales efficiency. These figures incorporate the performance of out-of-centre retail warehousing throughout each of the three West London Boroughs.

Table 11.2: Future Comparison Goods Floorspace Capacity by Local Authority (sq m net)

| Centre | 2011 | 2016 | 2021 |
|----------------------|--------|--------|--------|
| Ealing | 2,130 | 17,598 | 35,329 |
| Hammersmith & Fulham | 10,371 | 41,974 | 79,250 |
| Hounslow | 6,994 | 22,666 | 40,413 |

Brentford Housing Growth

- 11.32 The Study Brief requested we test two housing growth scenarios in Brentford town centre, and a review of the impact of this growth on capacity for new comparison and convenience goods floorspace. Based on population increases arising from new housing developments in the Brentford area, the following scenarios of population growth in Zone 16 are presented. It should be noted that these figures are not cumulative.

| Scenario 1 | | Scenario 2 | |
|------------|-------------------------|------------|-------------------------|
| 2006 | - 1,969 extra residents | 2006 | - 1,969 extra residents |
| By 2011 | - 3,437 extra residents | By 2011 | - 5,683 extra residents |
| By 2016 | - 2,326 extra residents | By 2016 | - 2,326 extra residents |
| By 2021 | - 2,507 extra residents | By 2021 | - 2,507 extra residents |

- 11.33 Table 11.3 below illustrates the implications of this population growth on available comparison goods expenditure in Zone 16. By 2016, these figures equate to an increase of £39m in Scenario 1, and £51m in Scenario 2.

Table 11.3: Growth in Comparison Goods Expenditure ZONE 16

| | Baseline (Trendline) Comparison Goods Expenditure in Zone 16 (£000) | Scenario 1 Comparison Goods Expenditure in Zone 16 (£000) | Scenario 2 Comparison Goods Expenditure in Zone 16 (£000) |
|------|--|--|--|
| 2006 | 55,562 | 62,186 | 62,186 |
| 2011 | 68,871 | 91,317 | 100,643 |
| 2016 | 85,510 | 125,136 | 136,647 |
| 2021 | 106,076 | 170,846 | 185,053 |

Note: Column 2 equates to total available expenditure in Zone 16 / Column 3 and 4 incorporate the increase in spend generated from new population onto the baseline expenditure in Column 2.

- 11.34 Using a sales density of £6,704 sq m net (2016), having increased by 2% per annum from a base level of £5,500 per sq m net in 2006, this additional expenditure would support circa 5,911 sq m net (2016) of additional comparison goods floorspace in Scenario 1, and 7,628 sq m net in Scenario 2 by 2016. In 2021, with a sales density of £7,402 per sq m, this additional expenditure would support circa 8,750 sq m net in Scenario 1 and 10,670 sq m net in Scenario 2.
- 11.35 This is, however, based on the assumption that there will be 100% trade retention in Zone 16, which is unrealistic. At present Brentford only has an 8% market share in Zone 16 (See Table 10.6 for comparison with other centres), and at this level the additional expenditure will only support 473 sq m net of additional floorspace in Scenario 1 (700 sq m net in 2021) and 610 sq m net in Scenario 2 by 2016 (854 sq m net in 2021). Only 8% of the increase in available expenditure will support additional floorspace assuming a scheme has no effect on market share.
- 11.36 The figures discussed above are all in addition to capacity forecasts in both the baseline position and those set out incorporating all proposals and commitments.
- 11.37 In reality, new development is likely to enhance market share, especially in Zone 16 but also in surrounding zones, with the level of supportable floorspace being greater subject to composition and quality of a scheme. The opportunity to enhance market share significantly is realistic, but this will have implications on retail floorspace in the catchment area.
- 11.38 We have undertaken a similar exercise for convenience goods. Table 11.4 below illustrates the implications of this population growth on available convenience goods expenditure in Zone 16. By 2016, these figures equate to an increase of £13.8m in Scenario 1, and £17.8m in Scenario 2.

Table 11.4: Growth in Convenience Goods Expenditure ZONE 16

| | Baseline (Trendline) Convenience Goods Expenditure in Zone 16 (£000) | Scenario 1 Convenience Goods Expenditure in Zone 16 (£000) | Scenario 2 Convenience Goods Expenditure in Zone 16 (£000) |
|------|---|---|---|
| 2006 | 27,437 | 30,708 | 30,708 |
| 2011 | 28,531 | 37,830 | 41,693 |
| 2016 | 29,718 | 43,490 | 47,491 |
| 2021 | 30,928 | 49,813 | 53,955 |

- 11.39 Using a sales density of £12,000 per sq m net and a 0% sales efficiency on existing floorspace, this additional expenditure would support circa 1,150 sq m net (2016) of additional convenience goods floorspace in Scenario 1; and 1,483 sq m net in Scenario 2 by 2016 (1,574 sq m, 2021, Scenario 1 / 1,919 sq m, 2021, Scenario 2) The sales density of £12,000 per sq m net is the trading level most of the major foodstore operators would wish to achieve when open. For example, Tesco, Sainsbury's, Asda, Morrisons and Waitrose.
- 11.40 Using a sales density of £4,000 per sq net and a 0% sales efficiency on existing floorspace, this additional expenditure would support circa 3,450 sq m net (2016) of additional convenience goods floorspace in Scenario 1 (4,721 sq m, 2021); and 4,450 sq m net in Scenario 2 by 2016 (5,757 sq m, 2021). The sales density of £4,000 per sq m net is the trading level most of the smaller and discount foodstore operators would wish to achieve when open. For example, Aldi, Budgens, Iceland, Somerfield, Spa and Kwik Save.
- 11.41 This is, however, based on the assumption that there will be 100% trade retention in Zone 16, which is perhaps unrealistic, although there is certainly opportunity to enhance market share through new quality provision. At present, Brentford has a 38% market share in Zone 16 (See Table 10.8 for comparison with other centres), and at this level the additional expenditure will only support 437 sq m net of additional floorspace in Scenario 1 based on a £12,000 per sq m net sales efficiency, by 2016 (598 sq m, 2021). In Scenario 2, the figures would equate to 564 sq m net of additional floorspace in 2016 and 729 sq m in 2021).
- 11.42 Based on a £4,000 per sq m net sales density, a 38% market share of additional expenditure would equate to 1,311 sq m net in Scenario 1 by 2016 (1,794 sq m in 2021), and 1,691 sq m net in Scenario 2 by 2016 (2,188 sq m in 2021). This is the floorspace that the additional expenditure would support if only 38% of additional available expenditure were retained within Zone 16. The figures discussed above are all in addition to capacity forecasts in both the baseline position and those set out incorporating all proposals and commitments.

- 11.43 In reality, like comparison goods, new development is likely to enhance market share, especially in Zone 16, and to some extent (depending on the scale and quality) in surrounding zones. The opportunity to enhance market share is realistic, but any floorspace over the capacity figures set out in paragraph 11.39 and 11.40 above will be based on claw back and therefore impact on existing floorspace in the wider area.

Ealing Housing Growth

- 11.44 The Study Brief requested we test one housing growth scenario in Ealing town centre, and a review of the impact of this growth on capacity for new comparison and convenience goods floorspace. The scenario comprises 430 new residential units / 1,000 new people in the Dickens Yard proposals and 480 units / 1,030 new people in the Arcadia proposals. It is envisaged that this population growth will be completed by 2016. It should be noted that population figures for Dickens Yard and Arcadia, both discussed below, are purely notional at this stage and may be subject to change.
- 11.45 Table 11.5 below illustrates the implications of this population growth on available comparison goods expenditure in Zone 5 by 2016. By 2016, these figures equate to an increase of £13.0m by 2016.

Table 11.5: Growth in Comparison Goods Expenditure ZONE 5

| | Baseline (Trendline) Comparison Goods Expenditure in Zone 5 (£000) | Comparison Goods Expenditure in Zone 5 with Additional Population (£000) |
|------|---|---|
| 2016 | 391,418 | 404,420 |

- 11.46 Using a sales density of 6,704 sq m net, having increased by 2% per annum from a base level of £5,500 per sq m net in 2006, this additional expenditure would support circa 1,939 sq m net of additional comparison goods by 2016.
- 11.47 This is, however, based on the assumption that there will be 100% trade retention in Zone 5, which is unrealistic. At present Ealing has a 52.7% market share in Zone 5 (See Table 10.6 for comparison with other centres), and at this level the additional expenditure will only support 1,022 sq m net of additional floorspace by 2016. Only 52.7% of the increase in available expenditure will support additional floorspace assuming a scheme has no effect on market share. In reality, new development is likely to enhance market share, especially in Zone 5 but also in surrounding zones, with the level of supportable floorspace being greater subject to composition and quality of a scheme.
- 11.48 We have undertaken a similar exercise for convenience goods. Table 11.6 below illustrates the implications of this population growth on available convenience goods expenditure in Zone 5 by 2016. By 2016, these figures equate to an increase of £4.0m in available convenience goods expenditure.

Table 11.6: Growth in Convenience Goods Expenditure ZONE 5

| | Baseline (Trendline) Convenience Goods Expenditure in Zone 5 (£000) | Convenience Goods Expenditure in Zone 5 (£000) |
|--|--|---|
|--|--|---|

| | | |
|------|---------|---------|
| 2016 | 120,961 | 124,982 |
|------|---------|---------|

- 11.49 Using a sales density of £12,000 per sq m net and a 0% sales efficiency on existing floorspace, this additional expenditure would support circa 335 sq m net (2016) of additional convenience goods floorspace by 2016. The sales density of £12,000 per sq m net is the trading level most of the major foodstore operators would wish to achieve when open. For example, Tesco, Sainsbury's, Asda, Morrisons and Waitrose.
- 11.50 Using a sales density of £4,000 per sq net and a 0% sales efficiency on existing floorspace, this additional expenditure would support circa 1,005 sq m net of additional convenience goods floorspace by 2016. The sales density of £4,000 per sq m net is the trading level most of the smaller and discount foodstore operators would wish to achieve when open. For example, Aldi, Budgens, Iceland, Somerfield, Spa and Kwik Save.
- 11.51 This is, however, based on the assumption that there will be 100% trade retention in Zone 5, which is perhaps unrealistic, although there is certainly opportunity to enhance market share through new quality provision. At present, Ealing has a 54.2% market share in Zone 5 (See Table 10.8 for comparison with other centres), and at this level the additional expenditure will only support 182 sq m net of additional floorspace based on a £12,000 per sq m net sales efficiency.
- 11.52 Based on a £4,000 per sq m net sales density, a 54.2% market share of additional expenditure would equate to 545 sq m net by 2016. This is the floorspace that the additional expenditure would support if only 54.2% of additional available expenditure were retained within Zone 5.
- 11.53 In reality, like comparison goods, new development is likely to enhance market share, especially in Zone 5, and to some extent (depending on the scale and quality) in surrounding zones. The opportunity to enhance market share is realistic, but any floorspace over the capacity figures set out above will be based on claw back and would potentially impact on existing floorspace in the wider area.
- 11.54 In reality the Dickens Yard and Arcadia schemes will include retail development which will enhance market share to support new floorspace and this should be factored in as well. At present the amount of new floorspace supported through an increase in population alone is relatively limited.

Southall Housing Growth

- 11.55 The Study brief requested we test a housing growth scenario to test the implications of new residential development and population increases as part of the Southall Gas Works proposals. Baseline population projections are derived from Experian trendline data, and any new housing on the Gas Works site will need to be factored in on top.
- 11.56 We have reviewed the impact of this growth on capacity for new comparison and convenience goods floorspace, assuming completion by 2021, assuming phasing throughout the period. The scenario

assumes a population increase of 10,000 in Zone 10, the Zone comprising Southall town centre and the Gas Works site.

- 11.57 Based on population increases arising from new housing development on the Southall Gas Works site, the population will reach circa 64,606, up from 54,606 from the baseline position. Table 11.7 below illustrates the implications of this population growth on available comparison goods expenditure in Zone 10. By 2021, these figures equate to an increase of £39.1m over and above the baseline expenditure figure of £213.3m.

Table 11.7: Growth in Comparison Goods Expenditure ZONE 10

| | Baseline (Trendline) Comparison Goods Expenditure in Zone 10 (£000) | Comparison Goods Expenditure in Zone 10 (£000) |
|------|--|---|
| 2021 | 213,268 | 252,323 |

- 11.58 Using a sales density of 7,402 sq m net, having increased by 2% per annum from a base level of £5,500 per sq m net in 2006, this additional expenditure would support circa 5,276 sq m net (2021) of additional comparison goods floorspace. This retail floorspace should be directed into Southall town centre in the first instance in accordance with the sequential test.
- 11.59 This is, however, based on the assumption that there will be 100% trade retention in Zone 10, which is unrealistic. To put this into some context, Southall town centre currently only has a 5.5% market share in Zone 10 (See Table 10.6 for comparison with other centres), and at this level the additional expenditure would only support circa 290 sq m net of additional floorspace by 2021. Proposals will need to be tested on their own merits depending on location, retail composition and tenant mix. Any floorspace over and above that set out in paragraph 11.46 (i.e. 5,276 sq m net by 2021) will need to be supported through claw back and consequent impact on alternative retail destinations.
- 11.60 We have undertaken a similar exercise for convenience goods. Table 11.8 below illustrates the implications of this population growth on available convenience goods expenditure in Zone 10. By 2021, these figures equate to an increase of £11.2m over and above the baseline expenditure figure of £61m.

Table 11.8: Growth in Convenience Goods Expenditure ZONE 10

| | Baseline (Trendline) Convenience Goods Expenditure in Zone 10 (£000) | Convenience Goods Expenditure in Zone 10 (£000) |
|------|---|--|
| 2021 | 60,989 | 72,158 |

- 11.61 Using a sales density of £12,000 per sq m net and a 0% sales efficiency on existing floorspace, this additional expenditure would support circa 931 sq m net (2021) of additional convenience goods floorspace. The sales density of £12,000 per sq m net is the trading level most of the major foodstore operators would wish to achieve when open. For example, Tesco, Sainsbury's, Asda, Morrisons and Waitrose.

-
- 11.62 Using a sales density of £4,000 per sq m net and a 0% sales efficiency on existing floorspace, this additional expenditure would support circa 2,792 sq m net (2021) of additional convenience goods floorspace. The sales density of £4,000 per sq m net is the trading level most of the smaller and discount foodstore operators would wish to achieve when open. For example, Aldi, Budgens, Iceland, Somerfield, Spa and Kwik Save.
- 11.63 Again, this is based on the assumption that there will be 100% trade retention in Zone 10, which is unrealistic, although there is certainly opportunity to enhance market share through new quality provision. Floorspace capacity should, in the first instance, be directed towards the town centre in the first instance on the basis of the sequential test. At present, Southall has a 12.1% market share in Zone 10 for convenience goods (see Table 10.8 for comparison with other centres), and at this level the additional expenditure will only support 113 sq m net of additional floorspace based on a £12,000 per sq m net sales efficiency.
- 11.64 Based on a £4,000 per sq m net sales density, a 12.1% market share of additional expenditure would equate to 338 sq m net. This is the floorspace that the additional expenditure would support if only 12.1% of additional available expenditure were retained within Zone 10.
- 11.65 In reality, like comparison goods, new development is likely to enhance market share, especially in Zone 10, and to some extent (depending on the scale and quality), in surrounding Zones. The opportunity to enhance market share is realistic, but any floorspace over the capacity figures set out in paragraph 11.50 and 11.51 above will be based on claw back and therefore impact on existing floorspace. Capacity should be directed towards the town centre in the first instance. If implemented on the Southall Gas Works site, the floorspace will impact on the town centre and the implications and extent of this should be carefully assessed by the applicant and reviewed by the London Borough of Ealing.

Comparison Goods Expenditure Growth/Sales Efficiency

- 11.66 In line with best practice, we have drawn on published data sources and our experience elsewhere to test a series of scenarios which influence the need and capacity of future retail space. Scenarios have been tested on capacity projections which have factored in all identified retail commitments. This provides the three West London Authorities with conservative and optimistic forecasts, and enables an analysis of the impact of floorspace commitments on the identified baseline capacity for new space. On this basis, we have tested variations in available expenditure growth and the increase in efficiency of existing retail space.
- 11.67 Sales efficiency is one of the key variables influencing global capacity. One of the main drivers of expenditure growth on comparison goods has been growth in the value, as opposed to volume of purchases. A good example is high value flat screen televisions replacing lower value, higher bulk predecessors. As a consequence, it would not be appropriate to translate the forecast growth in comparison goods retail sales directly into a need for additional floorspace. An allowance must be made for existing space to grow in turnover.
- 11.68 On this basis, the range of scenarios tested in terms of comparison goods expenditure growth and sales efficiency include the following: -
-

- 3.8% Growth / 1.5% Efficiency
- 3.8% Growth / 2% Efficiency
- 3.8% Growth / 2.5% Efficiency
- 4.3% Growth / 1.5% Efficiency
- 4.3% Growth / 2% Efficiency
- 4.3% Growth / 2.5% Efficiency

11.69 The consequences of scenario testing on identified capacity is attached in Appendix 14. The most optimistic growth scenario incorporates the highest growth rate (4.3%) and the lowest sales efficiency (1.5%). The most conservative growth scenario incorporates the lowest growth rate (3.8%) and the highest sales efficiency (2.5%).

11.70 We have tested six expenditure growth/sales efficiency scenarios, but in reality a higher growth in expenditure is likely to result in a stronger growth in sales efficiency, and a lower growth in expenditure is likely to result in a weaker growth in sales efficiency. On this basis, we consider a 4.3% expenditure growth/1.5% sales efficiency and a 3.8% expenditure growth/2.5% sales efficiency, are the most unrealistic scenarios; and ones that result in the greatest variations in capacity. When planning for the LDF period, we consider that the most realistic scenarios are the following:-

- 3.8% growth / 1.5% sales efficiency
- 3.8% growth / 2% sales efficiency
- 4.3% growth / 2% sales efficiency
- 4.3% growth / 2.5% sales efficiency

11.71 These projections result in the least extreme variations in capacity, and will enable the three West London Authorities to be somewhat flexible to changing economic circumstances over the LDF period when making policy and development control decisions.

Convenience Goods Floorspace Commitments

11.72 When forecasting capacity for new convenience goods floorspace in West London our model has taken into consideration known commitments for new convenience goods floorspace. These either have consent and have not yet been constructed, or have consent and have opened for trading since the telephone survey was undertaken. The major Asda foodstore in the redeveloped Feltham Shopping Centre was open and trading at the time of the telephone survey and has not, therefore, been included as a commitment. Commitments agreed with clients team include the following:-

- Lidl, Ruislip Road, LB Ealing;
- Sainsbury's Extension, Townmead Road, LB Hammersmith & Fulham;
- Aldi Extension, Feltham, LB Hounslow;
- Blenheim Centre, Phase 1, LB Hounslow.

11.73 We have incorporated the commitments into the baseline forecasts as outlined in Section 10, and reviewed how they will impact upon capacity for additional convenience goods floorspace up to 2021.

In order to translate residual convenience goods expenditure into floorspace, we have assumed two variations of sales density. The first equates to the general performance of the major food superstore operators, which would aim to achieve in the region of £12,000 per sq m net in 2006. The second equates to the general performance of the smaller and discount retailers, which would aim to achieve in the region of £4,000 per sq m net in 2006.

- 11.74 Building on these two variations, we have reviewed the capacity for additional convenience goods floorspace in each of the twelve major West London town centres, and have reviewed the borough wide capacity and a global capacity for the three West London authorities. Table 11.9 below illustrates capacity using a 0.7% expenditure growth rate, and a 0% sales efficiency rate.

Table 11.9: Future Convenience Goods Floorspace Capacity by Centre (sq m net)

| Centre | 2011 | | 2016 | | 2021 | |
|-----------------|-----------------|------------------|-----------------|------------------|-----------------|------------------|
| | £4,000 per sq m | £12,000 per sq m | £4,000 per sq m | £12,000 per sq m | £4,000 per sq m | £12,000 per sq m |
| Ealing | 17,105 | 5,702 | 18,431 | 6,144 | 19,885 | 6,628 |
| Hanwell | 931 | 310 | 1,025 | 342 | 1,125 | 375 |
| Southall | -3,085 | -1,028 | -2,909 | -970 | -2,731 | -910 |
| Acton | 3,481 | 1,160 | 4,084 | 1,361 | 4,739 | 1,580 |
| Greenford | 2,884 | 961 | 3,313 | 1,104 | 3,744 | 1,248 |
| Hammersmith | 1,811 | 604 | 2,625 | 875 | 3,512 | 1,171 |
| Fulham | 4,592 | 1,531 | 5,901 | 1,967 | 7,325 | 2,442 |
| Shepherd's Bush | -1,723 | -574 | -1,041 | -347 | -290 | -97 |
| Hounslow | -9,724 | -3,241 | -9,552 | -3,184 | -9,373 | -3,124 |
| Feltham | -10,420 | -3,473 | -9,867 | -3,289 | -9,333 | -3,111 |
| Chiswick | 13,529 | 4,510 | 14,700 | 4,900 | 15,960 | 5,320 |
| Brentford | 894 | 298 | 1,057 | 352 | 1,227 | 409 |

- 11.75 Table 11.10 outlines global capacity forecasts for additional convenience goods floorspace by local authority. Again, this incorporates a 0.7% growth rate and no allowance for sales efficiency. These figures include the performance of out-of-centre foodstores throughout each of the three West London Boroughs.

Table 11.10: Future Convenience Goods Floorspace Capacity by Local Authority (sq m net)

| Centre | 2011 | | 2016 | | 2021 | |
|----------------------|-----------------|------------------|-----------------|------------------|-----------------|------------------|
| | £4,000 per sq m | £12,000 per sq m | £4,000 per sq m | £12,000 per sq m | £4,000 per sq m | £12,000 per sq m |
| Ealing | 22,932 | 7,644 | 27,299 | 9,100 | 31,945 | 10,648 |
| Hammersmith & Fulham | 7,435 | 2,478 | 12,223 | 4,074 | 17,414 | 5,805 |
| Hounslow | 10,041 | 3,347 | 15,881 | 5,294 | 22,010 | 7,337 |

Convenience Goods Expenditure Growth/Sales Efficiency

- 11.76 Like comparison goods, we have tested a range of growth and sales efficiency scenarios which have implications for identified capacity. Published figures for convenience goods are more conservative than for comparison goods on the basis that people can only consume so much food and drink. Nevertheless, there has been a growth in the range of higher quality food and organic products which is increasing sales efficiency, although to a more limited extent.
- 11.77 On this basis, the range of scenarios tested in terms of convenience goods expenditure growth and sales efficiency include the following: -
- 0.5% Growth / 0% Efficiency
 - 0.5% Growth / 0.3% Efficiency
 - 0.7% Growth / 0% Efficiency
 - 0.7% Growth / 0.3% Efficiency
- 11.78 When converting residual expenditure into floorspace we have also incorporated a range of sales density figures based on the differing performance of the major foodstore operators and the smaller and discount operators. In addition to the growth and efficiency scenarios tested above, we have tested a £4,000 per sq m net and a £12,000 per sq m net sales efficiency rate to reflect the varying performance of foodstore operators. The scenario testing for convenience goods and impact on capacity is attached in Appendix 12.

Summary

- 11.79 We have undertaken economic capacity forecasts for convenience and comparison retailing in West London to the period 2021, incorporating interim years of 2011 and 2016. In each case, we have examined capacity by centre, by authority and global capacity in the three West London Authorities. The assessment has been under-pinned by a bespoke Household Telephone Survey (3,000 interviews) and in-centre surveys in the 12 larger centres.
- 11.80 In terms of convenience goods global capacity projections, our analysis has tested a range of scenarios. Based on a £4,000 per sq m net potential sales density, the economic capacity projections suggest that the three West London Authorities can support between 33,801 sq m net and 40,408 sq m of new (additional) floorspace by 2011, incorporating all known commitments. Although forecasts beyond this period should be treated with caution, the capacity forecasts at 2016 increase to between 42,080 sq m net to 55,402 sq m net. By 2021 the figures suggest there is capacity for an additional 50,703 – 71,369 sq m net. Using a potential sales density of £12,000 per sq m net, the three West London Authorities could support up to 23,790 sq m net of new (additional) convenience goods floorspace by 2021.

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- 11.81 In terms of comparison goods, economic projections identify capacity for between 201 sq m and 29,446 sq m net of additional floorspace by 2011. This range incorporates all comparison goods key proposals and commitments. By 2016, following further population and expenditure growth, we calculate capacity for up to 105,547 sq m net. By 2021 this is set to grow to 195,958 sq m net, including known commitments.
- 11.82 For the purposes of development control and policy formulation it is necessary to identify capacity within each London Borough. The following forecasts for each borough incorporate all known commitments, as identified by each local planning authority:
- In Ealing, based on a potential £4,000 per sq m net sales density, we forecast convenience goods capacity of up to 31,945 sq m net, and 10,648 sq m net based on a potential £12,000 per sq m net by 2021.
 - In Hounslow, we forecast capacity for an additional 22,010 sq m net, based on £4,000 per sq m net by 2021, and 7,337 sq m net based on £12,000 per sq m net.
 - In Hammersmith & Fulham we forecast capacity for an additional 17,414 sq m net based on £4,000 per sq m net by 2021, and 5,805 sq m net assuming an average sales density of £12,000 per sq m net.
- 11.83 Taking into account the increase in trade draw through identified commitments and impact on other centres in the network, economic capacity forecasts indicate that Ealing Borough could support up to 35,329 sq m net of additional comparison goods floorspace by 2021; Hammersmith & Fulham could support 79,250 sq m net; and Hounslow could support 40,413 sq m net. These figures will support all known commitments, and any capacity over and above these figures are available for new proposals. These figures are based on a sales density of £5,500 grown by 2% per annum. A series of scenarios based on variations in expenditure growth and sales efficiency rates are set out in Appendix 14.
- 11.84 It is important to stress that these capacity forecasts should not be taken as a restriction to new development, and nor do they provide the final 'answer'. Circumstances will continue to change as new schemes come forward and these figures should be viewed as fluid and subject to change as circumstances evolve. Indeed, market share and capacity may continue to fall in some centres, or market share and capacity may rise if new proposals come forward. Retail development throughout London will almost certainly continue and the capacity forecasts and market share changes should be viewed both as a threat to the health of town centres and as an opportunity to enhance/regenerate town centres and maintain/uplift a centre's position in the retail hierarchy.
- 11.85 The next stage of work, including a review of development opportunity sites and town centre strategies should identify how best to distribute this convenience and comparison goods capacity throughout each Borough to achieve the overall objectives relating to each centre. Depending on development site availability it may be more appropriate to re-direct capacity to alternative town centres or even boroughs. This depends entirely on site availability, viable schemes and investor confidence.
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12. THE LEISURE SECTOR

12.1 In this section, we undertake a qualitative and quantitative review of existing commercial leisure provision within the three West London Authorities. This enables us to provide commentary on the extent of the need for additional leisure floorspace within the three West London authorities. In particular, our methodology covers the following steps:-

- We draw on **national trends** in the leisure market to understand the health of specific categories of commercial leisure provision. This enables us to understand the commercial need for development at the local level, i.e. within the three West London Authorities;
- We have drawn on **detailed qualitative health checks and site visits** to understand the distribution and quality of existing provision. It is important for us to understand the need for replacement as well as new facilities. Existing leisure provision within the three West London Authorities is outlined in Sections 6-8: The West London Centres;
- We have **mapped** existing leisure provision to illustrate the distribution of leisure provision and highlight where there are gaps in provision at the borough level. We have demonstrated this through 5 minute drive times and walk in radius plans, but it is important to point out that people travel varying distances to visit leisure destinations. The exercise does, however, provide a useful indication of gaps and travel distances between facilities;
- We have undertaken a **detailed analysis of the Household Telephone Survey** results to understand where people from the individually defined zones are travelling to visit existing leisure facilities both within and beyond the three West London Authorities. The survey provides a good indication of trade retention, leakage, and the quality of leisure provision in the three West London Authorities. This exercise enables us to highlight longer and unsustainable travel patterns, indicating gaps in provision where facilities would serve more local catchment areas;
- Quantitative methodologies for considering the need for new leisure floorspace are less developed than those for retail floorspace. To set the context of economic growth, we do, however, provide a broad summary of the overall **growth in available leisure expenditure** to demonstrate the extent of growth rates and variations between the three West London Authorities.
- We have undertaken a more detailed quantitative analysis of two sub sectors where the developed methodology allows. We are able to examine how many new **cinema screens** can be supported and we consider the **growth in the casino market**. Similar data sources and quantitative methodologies are not available for other leisure sectors such as bingo provision, which instead relies on gaps in provision, national trends, and the commercial market. Based on the current market, we are able to quantify **the need for new A3/A4 leisure floorspace** in town centres based on the outcome of the quantitative retail capacity forecasting.

- 12.2 First, we review different types of leisure provision, distribution, gap analysis and travel patterns. This enables us to draw conclusions in respect of the quality of provision and gaps where we believe the need for additional facilities could be met. For cinemas and casino's we develop the methodology further and outline the quantitative need for new facilities. Second, we forecast leisure growth projections reviewing variations across the three boroughs, and quantify the need for A3/A4 leisure floorspace based on our retail capacity forecasts set out in Section 10 and 11.

Leisure Choices

Cinema

- 12.3 According to Dodona Research (2006), the number of operational cinema screens in the UK has remained virtually static in the last few years with the number of new screen openings significantly reduced since the more dynamic period around the turn of the decade and in the late 1990's. Despite some investment in smaller cinemas, multiplexes continue to increase their share of screens which now stands at 73%, i.e. the number of cinemas has decreased but the number of screens has increased. There are now just over 200 single screen cinemas left and only 16% of all screens are now in cinemas with less than four auditoria.
- 12.4 According to Dodona, the number of multiplex cinemas that opened in 2005 was amongst the lowest since 1987, and the number of new multiplex screens was the lowest since that year. The prospects for 2006 were considerably better, with eight new complexes planned sharing 64 screens. Dodona predict some pick-up in investment in the next few years, but on balance there will probably only be modest growth as the industry adjusts to new technologies and new ways of doing things.
- 12.5 By the end of the decade, when we expect to see a digital industry operating in a considerably more flexible way, Dodona predict things may look considerably brighter. The key driver leading to demand in West London, discussed below, appears to be considerable population growth.
- 12.6 The Household Telephone Survey identified 1,755 people out of 3,000 asked, within the West London catchment area who visit cinemas. It is clear (Table 12.1) that, at present, the edge-of-centre Cineworld in Feltham has the strongest influence in West London attracting 16.4% of respondents.

Table 12.1: Most Dominant Cinema Destinations

| Cinema | Borough | No. of Screens | Market Share |
|----------------------|----------------------|----------------|--------------|
| Cineworld, Feltham | Hounslow | 14 | 16.4% |
| Vue, Park Royal | Ealing | 9 | 9.9% |
| Odeon, Richmond | Beyond Study Area | 3 | 9.7% |
| Odeon, Uxbridge | Beyond Study Area | 9 | 6.0% |
| Vue, Shepherds Bush | Hammersmith & Fulham | 12 | 5.2% |
| Empire, Ealing | Ealing | 3 | 4.9% |
| Vue, Fulham Broadway | Hammersmith & Fulham | 6 | 4.8% |
| Vue, Staines | Beyond Study Area | 10 | 4.6% |
| Vue, Harrow | Beyond Study Area | 9 | 4.1% |
| UGC, Hammersmith | Hammersmith & Fulham | 4 | 3.7% |

Source: Household Telephone Survey, September 2006

- 12.7 To supplement our qualitative assessment through site visits and the Household Telephone Survey, we have produced a gap analysis plan (Plan set 7) illustrating 5 minute drive times from cinema provision in the three West London Authorities. Drawing on each work element, it is clear that Hammersmith & Fulham is relatively well represented in terms of cinema screens. Despite limited gaps in provision, cinema choices will be further enhanced following the opening of a large multi-plex cinema within the White City development at Shepherds Bush, which could accommodate up to 20 screens.
- 12.8 In Hounslow, the Feltham multiplex is the most popular cinema in West London, serving the west of the Borough. Existing cinema provision elsewhere in the Borough is, however, particularly limited with only a small arts cinema in Brentford. A new multiplex will open in Hounslow as part of the Blenheim Phase 2 scheme, filling a gap in provision in this location. Hounslow is located in Zone 14, and at present local residents are travelling to the Cineworld in Feltham (74%).
- 12.9 Drawing on the drive time gap analysis and travel patterns analysed from the Household Telephone Survey, we consider there is a qualitative gap in cinema provision in the east of Hounslow Borough, i.e. within Zone 15/16/17. At present, residents in Zone 15 are travelling to the Cineworld in Feltham (33%) and the Odeon in Richmond (46%). In Zone 16, residents are travelling to the Cineworld in Feltham (18%), Vue at Park Royal (13%), and the Odeon in Richmond (13%). In Zone 17, residents are travelling to the Odeon in Richmond (13%) and the UGC in Hammersmith (32%). Only 11% of residents in Zone 16 and 7% of residents in Zone 17 are using the Arts Cinema in Brentford.
- 12.10 We also consider there are gaps in cinema provision in Ealing Borough. At present, as you would expect, residents in Zone 4, 5 and 6 are using the local cinemas at Park Royal and in Ealing town centre. In Zone 7, 8, 9, and 10, however, residents are having to travel further afield to cinemas which are not local to them. In Zones 7 and 8 a large proportion are travelling to the Vue cinema in Harrow, while those in Zone 9 and 10 are having to travel unsustainable distances to alternative destinations. For example, residents in Zone 9 are travelling to Cineworld in Feltham (18%), Vue at Park Royal (22%), Odeon, Uxbridge (22%), and the Empire Cinema in Ealing (14%). Residents in Zone 10 are travelling to the Cineworld in Feltham (26%), Vue at Park Royal (17%), the Odeon in Uxbridge (10%) and the Empire cinema in Ealing (17%).
- 12.11 As we have mentioned above, the existing cinema in Ealing town centre is small (3 screens) and out-dated. Planning consent has been granted for a new 16-screen cinema, but this has not yet been implemented. If it is built it will meet the evident qualitative deficiency in the centre of the Borough. We also consider there is a qualitative gap in provision in the west of the Borough within Zones 9-10, although given the major multiplex in Acton, the Bollywood cinema in Southall, and a committed 16-screen in Ealing, we consider only a smaller mainstream cinema (circa 6 screens) could be supported.
- 12.12 In order to build on our qualitative findings, we have undertaken a quantitative need assessment for new cinemas within Zones 1-17 of the catchment area which broadly comprise the three West London authorities. The methodology compares the average population per screen in the UK with the population per screen in Zones 1-17. The shortfall highlights the need for new screens to bring West London back in line with the national average. The process also projects forward to 2021 taking into consideration population forecasts and the consequent growth in the need for cinema screens.
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- 12.13 Table 12.2 highlights the number of screens within Zones 1-17. It is evident that the majority of the cinemas are drawing between 40-60% of their trade from within the catchment area, this is primarily because the cinemas are located to the edge of the local authority boundaries. This exercise suggests the three local authorities are currently served by 26.4 cinema screens.

Table 12.2: Number of Cinema Screens Serving Catchment

| Cinema | Borough | No. of Screens | % of Catchment Overlap (See Note A) | Screens Serving local authority boundaries (See Note B) |
|---|----------------------|----------------|-------------------------------------|---|
| Cineworld, Feltham | Hounslow | 14 | 45 | 6.3 |
| Vue, Park Royal (Acton) | Ealing | 9 | 50 | 4.5 |
| Vue, Shepherds Bush | Hammersmith & Fulham | 12 | 45 | 5.4 |
| Empire, Ealing | Ealing | 3 | 90 | 2.7 |
| Vue, Fulham Broadway | Hammersmith & Fulham | 6 | 50 | 3.0 |
| UGC, Hammersmith | Hammersmith & Fulham | 4 | 50 | 2.0 |
| Himalya Palace Cinema, Southall | Ealing | 3 | 60 | 1.8 |
| Watermans Cinema and Arts Centre, Brentford | Hounslow | 1 | 70 | 0.7 |
| TOTAL | | 52 | | 26.4 |

Source: Cinemagoing, Dodona Research 2006

Note A: Some cinema screens within the three West London Authorities will serve population living beyond the borough boundaries. This % reflects the proportion of screens serving the population living within the three West London Authorities.

Note B: This figures demonstrate the number of screens serving the population living within the three West London Authorities. The remaining screens will serve population living beyond the three West London Authorities.

- 12.14 Table 12.3 outlines the population per screen in the UK and Zones 1-17 of the catchment area projecting provision to 2006, 2011 and 2016, based on growth in population and subsequent number of screens needed to serve the total population. Using our population figures it is evident that in our projected years these zones have more people per screen than the national average, suggesting a deficiency in cinema provision and/or likelihood that residents of the three authorities are using facilities situated outside the area.

Table 12.3: Population Per Screen

| | Estimated Population (m) | No. of Screens | Population Per Screen |
|--|--------------------------|----------------|-----------------------|
| UK (2006) | 59.26 | 3,400 | 17,429 |
| West London Boroughs (Zones 1-17) - 2006 | 0.694 | 26 | 26,288 |
| UK (2011) | 59.94 | 3,592 | 16,687 |
| West London Boroughs (Zones 1-17) - 2011 | 0.707 | 26 | 26,780 |
| UK (2021) | 61.14 | 3,912 | 15,629 |
| West London Boroughs (Zones 1-17) - 2021 | 0.734 | 26 | 27,803 |

- 12.15 Table 12.4 draws on the comparison with the UK average and illustrates the capacity for additional cinema provision within West London, on the assumption that the three authorities serve their own needs and attract a level of patronage from beyond. On this basis, our assessment highlights capacity for an additional 12 (2006), 19 (2011) and 34 (2021) cinema screens within West London to meet national average cinema provision based on our baseline population figures. Even if the trendline position overestimates current capacity, by ignoring the effects of facilities just beyond the area, the ratio of screens per capita is expected to grow over the period to 2021 generating further demand for additional cinemas.

Table 12.4: Capacity for Additional Cinema Provision in Three Authorities (Zones 1-17)

| | West London Authorities (Zones 1-17) Population (m) | UK Population Per Screen | Cinemas Necessary to Match UK Average | Shortfall of Cinema Screens in West London Authorities |
|------|---|--------------------------|---------------------------------------|--|
| 2006 | 0.639 | 17,439 | 40 | 14 |
| 2011 | 0.707 | 16,687 | 42 | 16 |
| 2021 | 0.734 | 15,629 | 47 | 21 |

- 12.16 It is clear from this quantitative analysis, that if the three West London Authorities are to bring themselves in line with the UK average a further 21 cinema screens are needed. There are currently commitments for a new 16-screen replacement cinema in Ealing, a multiplex cinema in the White City development which we understand could have up to 20 screens, and a 10-12 screen cinema in the new Blenheim Shopping Centre in Hounslow. Assuming 50% of these committed screens will serve the three West London Authorities directly, they will meet the full quantitative need for new screens in the study area. Nevertheless, there remain qualitative deficiencies in provision in the west of Ealing Borough and in the east of Hounslow Borough.

Bingo

- 12.17 Research undertaken by Mintel (2005) states that bingo has shown modest growth since 2000 despite a declining customer base. Deregulation has been the main source of growth, with bingo clubs having been allowed to offer bigger prizes and to install more gaming machines offering a larger jackpot payout. As a result, the outlook in 2005 for the bingo market was more positive than it was a few years ago. More recent research undertaken by Mintel (2007), however, states that bingo will continue to suffer from their downmarket image which limits their appeal as a night out for the majority of consumers. They emphasise that the industry will experience a downturn in turnover in 2007, not as a result of the Gambling Act, but because of the ban on smoking inside clubs which will be UK-wide by summer 2007.
- 12.18 We have reviewed bingo usage throughout the West London sub-region. Only 168 of respondents (5.6%) take part in bingo in the West London survey area. It is clear from the gap analysis plan (Plan set 7) that Hounslow is relatively well provided for in terms of bingo destinations. These include the Mecca

in Hounslow, and the Gala clubs in Hounslow and Feltham. Elsewhere, Hammersmith & Fulham has a Mecca bingo club in Fulham, but there is no provision in the north of the Borough. In Ealing, bingo provision is particularly limited, offering only the Gala Club in Acton. There is no bingo provision for residents in Ealing living in Zone 5, 6, 7, 8, 9 and 10. We consider that if the sites are available, and the market demand is there, additional bingo club provision could fill gaps in the northern part of Hammersmith & Fulham, and the central and western parts of Ealing Borough.

Ten-Pin Bowling

- 12.19 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years, but after a period of growth in the 1980's, decline set in during the early 1990's. Since then, however, a spate of investment in new centres and refurbishments by recognised chain brands has revitalised the industry to a degree. Mintel research (2006) state that recently, high-end, centralised venues have started to emerge, but the question remains whether this can dispel the lingering sense amongst many that bowling is either passe or too child, or youth-orientated, whilst offering only basic refreshments. It would appear that it is down to the market and investor confidence to decide, although the concept is already beginning to evolve to generate customer demand. For example, the Bloomsbury Bowl Lanes in Bloomsbury offers a 50's American themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.
- 12.20 We have reviewed ten-pin bowling provision throughout the West London sub-region. The Household Telephone Survey identified 539 people (17.9%) within the West London catchment area who visit ten-pin bowling destinations. It is clear that the tenpin bowling destination at Park Royal in Acton has the strongest market attracting 29.9% of residents within Zones 1-30, closely followed by the Megabowl at Feltham (28.8%).

Table 12.5: Most Dominant Ten-Pin Bowling Destinations

| Ten-Pin Bowling Destination | Borough | Market Share |
|----------------------------------|-------------------|--------------|
| Tenpin, Park Royal, Acton | Ealing | 29.9% |
| Megabowl, Feltham | Hounslow | 28.8% |
| Heathrow Bowl, Heathrow Airport | Hounslow | 10.8% |
| Kingston | Beyond Study Area | 6.1% |
| Ice & Bowl, Queensway, Bayswater | Beyond Study Area | 3.1% |
| Streatham | Beyond Study Area | 1.9% |
| Tolworth | Beyond Study Area | 1.5% |
| Finchley | Beyond Study Area | 1.1% |

Source: Household Telephone Survey, September 2006

- 12.21 To supplement our qualitative assessment through site visits and the Household Telephone Survey, we have produced a gap analysis plan (Plan set 7) illustrating 5 minute drive times from ten-pin bowling provision in the three West London Authorities. It is clear that there are only two ten-pin bowling destinations within the three boroughs, and are consequently strongly influential on leisure patterns.

- The Megabowl in Feltham has a 28.8% market share, and Tenpin at Park Royal has a 29.9% market share.
- 12.22 Hammersmith & Fulham has no ten-pin bowling provision, and residents instead have to travel further afield. In Zone 1, residents are travelling to Streatham (27%), Park Royal (9%), and Queensway (18%). In Zone 2, residents are travelling to Park Royal (56%), and Queensway (22%). In Zone 3, residents are travelling to Park Royal (67%) and Queensway (22%).
- 12.23 The east of Ealing is served by the ten-pin bowling destination at Park Royal, located on the boundary of Zone 4 and 5. The majority of residents elsewhere in the Borough, i.e. Zones 6-10, travel to Park Royal (67%, 59%, 50%, 55% and 32% respectively). A large number also travel to facilities at Heathrow airport and Queensway.
- 12.24 The Megabowl at the Leisure West Complex in Feltham is located in Hounslow Borough. It is one of the most popular ten-pin bowling destinations in West London, partly due to the weak provision at present. Residents in Hounslow, which broadly corresponds to Zones 11-17, travel to Megabowl for a ten-pin bowling trip. The Heathrow Bowl is also popular, with 33% in Zone 11 using the facility, 8% in Zone 13 and 14% in Zone 14. In Zone 15, residents also use facilities in Kingston, and in Zone 16 and 17 residents travel to both Park Royal and Feltham.
- 12.25 It is clear from our analysis that West London could support further ten-pin bowling provision to generate more sustainable travel patterns. If sites were available and the market demand was there, we consider that facilities could be supported in the London Borough Hammersmith & Fulham, the western part of Ealing Borough, and the eastern part of Hounslow Borough.

Health & Fitness Clubs

- 12.26 According to Mintel's report on *Health and Fitness Clubs – UK* (May 2003), between 1998 and 2002 the value of the private health and fitness clubs market increased by 62% at current prices; in real terms the growth was still substantial at 49%. Mintel recognise changes in sporting fashions, which have shifted away from competitive sports towards those focused on personal health and fitness development. The expansion has continued in recent years and the industry is forecast to remain strong throughout this decade and beyond as personal health and fitness awareness continues to develop.
- 12.27 We have reviewed health and fitness club patterns in the West London sub-region. It is clear from the results of the Household Telephone Survey that 28% of respondents use health and fitness clubs in West London at present. To supplement our qualitative assessment through site visits and the Household Telephone Survey, we have produced a gap analysis plan (Plan set 7) illustrating 5 minute drive times from health & fitness clubs in the three West London Authorities. This analysis includes both local authority and private facilities.
- 12.28 The assessment indicates that there is a good coverage in terms of 5 minute drive times across West London. The coverage is particularly strong in the eastern part of the survey area, in the vicinity of Hammersmith & Fulham, Chiswick, Acton and Ealing. Residents in this part of West London are generally within a 500m walk distance from such a facility. This reflects the growth in the industry in

recent years, as the health and fitness market has been notably faster than other leisure sectors. This is also in accordance with Government policy to ensure accessibility by walking and cycling, and are more heavily used or intensive sports and recreational facilities are planned for locations well served by public transport.

- 12.29 It is notable from the gap analysis plan, that provision becomes less dense towards the western part of the West London study area, particularly around Feltham in Hounslow Borough. In terms of need, new facilities should be directed towards town centres which are well linked in terms of public transport. The need seems more evident in the western part of Hounslow Borough and the eastern part of Ealing Borough. Provided the market demand is there, and the sites exist, health & fitness clubs should usually be encouraged with town centres and within mixed use retail/residential schemes.

Casino / Gaming Capacity

- 12.30 Casino expenditure within the three West London Authorities can be established by combining Experian's breakdown of gambling expenditure per capita and Mintel's estimates of the casino market. As detailed below in Table 12.6, a breakdown of the catchment populations expenditure per capita identifies the extent of the existing gaming market within the West London Authorities and from this the current level of estimated casino expenditure.

Table 12.6: Existing Casino Expenditure

| Year | Total Population | Gaming Expenditure £ (m) | Casino Expenditure £ (m) |
|------|------------------|-----------------------------|-----------------------------|
| 2006 | 693.7 | 90.9 | 8.2 |
| 2011 | 706.6 | 92.6 | 8.3 |
| 2016 | 720.6 | 94.4 | 8.5 |
| 2021 | 734.0 | 96.2 | 8.7 |

Note:

- 1: Gaming Expenditure based on "games of chance" spend per capita of £129 - As per Experian Retail Planner Report issued Feb 2006.
- 2: Casino expenditure assumed as 9% of total gaming market. As per Mintel net gambling expenditure - Mintel Gambler, Nov 2002.
- 3: 2003 Prices
- 4: Gaming expenditure grown at 5.3% as per the average growth of casino stakes over the last 5 years - Mintel Gambler, Nov 2002.

- 12.31 If the market remains subject to the current legislative regulations, it is predicted that gambling expenditure per head will continue to increase. On this basis, total expenditure in casinos from within the three West London Authorities is calculated at £8.2m in 2006, rising to £8.7m by 2021.
- 12.32 In submissions to the Joint Committee on the Draft Gambling Bill, the Cross Industry Group for the gaming industry (CIG) has formulated, in partnership with Pion Economics, an impact model to establish the existing level of expenditure within casinos and to estimate the level to which this will increase following deregulation. Whilst relatively complex in detail, Pion Economics detail the CIG impact model as:

“A baseline position is established that accords with known features of the existing gambling landscape. This baseline is then adjusted to reflect a “post-regulation” environment and impact of change assessed in terms of various parameters...”

- 12.33 Accordingly Pion have developed the following baseline position, and post-regulation adjustments:
- Adult participation in UK Casinos will grow from 3 to 10%;
 - Average visits to casinos per person, per annum, will increase from 9 to 12;
 - Average spend per casino visit will fall from £55 to £45.
- 12.34 The CIG Impact Model has been formulated to anticipate the increase in the market following deregulation as opposed to the ongoing evolution of the market and as such does not make any allowance for year on year expenditure increases per capita. The analysis indicates that following deregulation, casino expenditure in West London will grow by a factor of 3.64, a significant rise.
- 12.35 Based on input from the Cross Industry Gambling Group, the Pion model assumes that post deregulation participation in casino gambling should be remodelled at a rate of 10% with average trips increasing to around 12% per annum, whilst average spend is anticipated to decline to £45 per visit. These assumptions have been applied to the West London catchment to estimate what the possible casino spend within the catchment may be following deregulation.
- 12.36 In reaching a view on these judgements it is important to note that a post deregulation participation rate of only 10% is relatively low in relation to experience elsewhere. In the US for example participation can be as high as 40% in some states, and averages 26% across the US as a whole. We have used these working assumptions therefore as a conservative basis upon which to examine the gaming market within the study area.
- 12.37 It should also be noted that the Pi-on model seeks simply to quantify the expansion of the market resulting from new casinos. As such it does not account for year on year growth stemming from population and expenditure growth. To provide a full picture of how the market may evolve we have applied the factor of growth resulting from the Pion model to Experian’s nationally sourced data on the current level of gambling expenditure.

Table 12.7: Future Casino Spend

| Year | Total Population | Existing Casino Expenditure £ (m) | Anticipated Casino Expenditure £ (m) |
|------|------------------|--------------------------------------|---|
| 2006 | 693.7 | 8.2 | 29.8 |
| 2011 | 706.6 | 8.3 | 30.3 |
| 2016 | 720.6 | 8.5 | 30.9 |
| 2021 | 734.0 | 8.7 | 31.5 |

Notes: Anticipated Casino Expenditure assumed at factor of 3.64

- 12.38 On this basis it is anticipated that following deregulation casino expenditure within the study area will grow to £29.8 million, and that as a result of year on year growth the level of expenditure from within the study area in casinos will exceed £31 million by 2021 (Table 12.7). This assessment is based on existing levels of growth. It is anticipated that following deregulation casino's will be able to establish themselves as a mainstream leisure activity and as such the annual growth in casino expenditure is likely to exceed that of the last five years. On the basis of this assessment it is evident that there is sufficient expenditure capacity in West London to justify the development of new casino facilities, given that the three authorities currently contain no major Casino venues.

Pubs/Clubs

- 12.39 It is evident from the Household Survey results that 44% of respondents visit pubs and clubs. Taking the catchment area as a whole, Ealing is the most popular destination with a 9.5% market share. Ealing is closely followed by Richmond and the West End, i.e. centres not in the three West London Authorities. Other popular destinations beyond the three Boroughs include Twickenham, Staines, Hampton and Kingston. It is clear that a lot of trade is not being retained within the network of centres in the West London Boroughs.

Table 12.8: Most Dominant Pub/Club Destinations

| Pub/Club Destination | Borough | Market Share |
|----------------------|----------------------|--------------|
| Ealing | Ealing | 9.5% |
| Richmond | Beyond Study Area | 8.0% |
| West End | Beyond Study Area | 8.6% |
| Chiswick | Hounslow | 4.4% |
| Hammersmith | Hammersmith & Fulham | 3.3% |
| Hounslow | Hounslow | 2.8% |
| Fulham | Hammersmith & Fulham | 2.8% |
| Twickenham | Beyond Study Area | 2.6% |
| Staines | Beyond Study Area | 2.2% |
| Hampton | Beyond Study Area | 2.1% |
| Kingston | Beyond Study Area | 2.0% |

Source: Household Telephone Survey, September 2006

- 12.40 A closer analysis identifies the retention of pub/club trade in each Borough. In Hammersmith & Fulham, the larger centres including Hammersmith, Fulham and Shepherds Bush appear to be performing relatively well in this sector. In Zone 1, 44% are using facilities in Fulham, and only 9.5% are going to the West End, and 6.3% are going to Putney. In Zone 2, 38% are using Hammersmith, 8% are using Fulham and 13% are using the West End. In Zone 3, 27% are using Shepherds Bush, 18% are using Hammersmith, 11% are using Chiswick and 11% are using the West End.

- 12.41 In Ealing, whilst there is some leakage to the West End, much of the expenditure is retained in the Borough. Ealing town centre is evidently the most dominant destination, with strong market shares in Zone 4-10, ranging from 8.9% to 59.6%. Very few people stated Southall as the town centre in which they visit for pubs/clubs, but the centre does have a 6% market share in Zone 9, and an 8% market share in Zone 10. Acton has a tight catchment area focused on Zone 4 where it has a 14% market share, the Zone in which the town centre is located, but also faces competition from Ealing (28%), Chiswick (6%), and London (12%).
- 12.42 Greenford has a market share of 19% in Zone 7, 16% in Zone 8 and 17% in Zone 9. In Zone 7, the centre also faces competition from Harrow (14%), Ealing (24%), and London (14%). In Zone 8, residents are also using Harrow (11%), Ealing (9%), Northolt (18%) and Greenford (16%). Hanwell has a weak trade draw in terms of pubs/clubs, with a market share of only 9% in Zone 6 and 4% in Zone 10. In these Zones, residents are preferring to travelling to Ealing, London and Hounslow.
- 12.43 These results suggest that of the five major town centres in Ealing Borough, Ealing, Greenford and Acton town centres attract residents to their pubs and clubs, but fewer people are using Southall or Hanwell for this type of entertainment. A relatively high proportion of trade is also leaking from the Borough, and points to a need to improve town centre facilities.
- 12.44 Due to the physical extent of Hounslow Borough, bar and club trips are relatively varied with a number of centres having very tight pub/club catchment areas. As you would expect Hounslow has a market share of 25% and 39% in Zone 11 and 14, but competes with Heston, Uxbridge and Richmond in these Zones. Brentford has a 36% market share in Zone 16, the Zone in which it is located, but has competition from Ealing (26%), Chiswick (10%) and Isleworth (4.8%).
- 12.45 Chiswick has a strong pull in Zone 17 (71%), the Zone in which the town centre is located, and faces little competition from elsewhere in this Zone. Chiswick also draws 9.5% of people from Zone 16, but few people from elsewhere in the survey area. Feltham has an 18% market share in Zone 12, but faces competition from Richmond (9%), Teddington (9%), Kingston (9%) and Staines (6%). Feltham has a stronger market share of 26% in Zone 13, the Zone in which the town centre is located, but faces competition from Richmond (9%), Staines (14%), Kingston (12%), and Teddington (7%).

Restaurants

- 12.46 The Household Telephone Survey identified 79% of respondents who visit restaurants as an evening leisure activity. It is evident from the results of the telephone survey that Ealing is the most frequented destination for restaurant visits, although a number of other centres have tight catchment areas when more localised travel patterns are analysed. The main competing restaurant destinations beyond West London appear to be Richmond, London Central, Harrow, Chelsea and Ruislip.

Table 12.9: Most Dominant Restaurant Destinations

| Restaurant Destination | Borough | Market Share |
|------------------------|----------------------|--------------|
| Ealing | Ealing | 9.0% |
| Chiswick | Hounslow | 6.3% |
| Richmond | Beyond Study Area | 6.3% |
| London Central | Beyond Study Area | 5.4% |
| Fulham | Hammersmith & Fulham | 2.8% |
| Twickenham | Beyond Study Area | 2.6% |
| Hounslow | Hounslow | 2.6% |
| Harrow | Beyond Study Area | 2.2% |
| Hammersmith | Hammersmith & Fulham | 1.7% |
| Chelsea | Beyond Study Area | 1.7% |
| Ruislip | Beyond Study Area | 1.7% |

Source: Household Telephone Survey, September 2006

- 12.47 In Hammersmith & Fulham, Hammersmith has a 23.4% market share in Zone 2, the Zone in which it is located, but also faces competition from Chiswick (8%), London Central (20%), Kensington High Street (7.5%) and Fulham (11%). Fulham is located in Zone 1 of the survey area, and has a 43% market share for restaurants in this zone. Fulham does not appear to face direct competition from any one centre, although 10% of residents in Zone 1 travel to London Central to visit restaurants most often.
- 12.48 Shepherd's Bush has a 20.7% market share for restaurants in Zone 3, the zone in which it is located. Residents in this Zone also travel to Chiswick (18%), London Central (15%) and Hammersmith (8%). The three larger centres in Hammersmith & Fulham appear to be retaining a good proportion of restaurant trade in the Borough, although there is some competition from London Central, Chiswick and Kensington High Street.
- 12.49 In Ealing Borough, Ealing is the dominant centre in terms of restaurant visits, with a strong market share in Zone 4-10, ranging from 18% to 66%. Competing centres beyond the Borough include Chiswick, which has a market share of 18.5%, Harrow which has a market share of 9% in Zone 7 and 8% in Zone 8; Ruislip, which has a market share of 11% in Zone 8, and Wembley which has 4.8% market share in Zone 7. Greenford, a major centre in Ealing Borough has a reasonably good market share of 7.2% in Zone 7 and 8.1% in Zone 9. Acton has a strong and tight catchment area with a market share of 18.5% in Zone 4.
- 12.50 Southall has a 21% market share for restaurants in Zone 10, the Zone in which it is located, and Hanwell has a 8.3% market share in Zone 10. Ealing town centre is clearly the dominant restaurant destination in the Borough, although the other larger centres in the Borough including Hanwell, Southall, Greenford and Acton do have small tight catchment areas and do act as restaurant leisure destinations.
- 12.51 In Hounslow, Chiswick is the most popular destination for restaurants attracting 74% of people from Zone 17 and 20% from Zone 16. Chiswick also has a small market share in adjoining zones reflecting

its niche role as a desired restaurant destination. Hounslow has a wider, although a more diluted, catchment area with a market share of 20% in Zone 11, 9% in Zone 12, 19% in Zone 14 and 9% in Zone 15.

- 12.52 Feltham is located in Zone 13 of the survey area and has a 16.7% market share in this zone. In Zone 12, Feltham has a 9% market share, and it is clear that the centre competes with Twickenham, Hounslow, Central London, and Teddington in terms of restaurant provision. Brentford has a tight catchment area with a 21% market share in Zone 16 but draws little trade from elsewhere. Brentford's major competing centres in terms of restaurant offer include Ealing, Chiswick and Hounslow. Major competing centres for restaurant provision with Hounslow include Richmond, London Central, Twickenham, Sheen, Teddington and Isleworth.

Leisure Expenditure Projections

- 12.53 We summarise the overall growth in available leisure expenditure to demonstrate the extent of growth rates and variations between the three West London Authorities. The Experian E-marketer Report calculates annual consumer leisure expenditure per person on leisure and recreation goods and services in 2005, based upon the demographic profile of the catchment area. Leisure expenditure as defined by Experian includes recreation and sporting services, cultural services, games of chance (gambling) and bars/restaurants.
- 12.54 We have taken the base position and projected available expenditure per capita leading up to 2021 based on the population projections from the study area, and assuming an ultra long term growth rate in available expenditure of 2% per annum for leisure goods. This ultra long term growth rate figure is derived from Experian Business Strategies.

Table 12.10: Per Capita Leisure Goods Expenditure – Total Study Area

| 2006 (£) | 2011 (£) | 2016 (£) | 2021 (£) |
|----------|----------|----------|----------|
| 2,338 | 2,850 | 2,850 | 3,146 |

Source: Experian Business Solutions, E-Marketer 2006

- 12.55 The annual consumer expenditure per person on leisure goods in the survey area is currently £2,292 (2005 prices) based on an average across the study area. Per capita expenditure on these goods will grow to £3,146 by 2021 (Table 12.10). At present (2006) per capita spending on leisure goods in the study area is circa 30% above the national average.
- 12.56 If we apply the per capita goods expenditure to the total population of the catchment area it highlights that there is currently over £3,541 billion of available leisure expenditure in the catchment area. This is expected to rise to just over £5,376 billion by 2021.

Table 12.11: Total Leisure Expenditure Catchment Area

| | 2004 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) |
|-------------------|-------------|-------------|-------------|-------------|
| Total Survey Area | 3,541,000 | 4,087,266 | 4,685,040 | 5,376,107 |

Source: Experian Business Solutions, E-marketer, 2006

- 12.57 If we break this down by examining the annual consumer spend per local authority (Table 12.12), it reveals that per capita spending is the highest in Hammersmith and Fulham and the lowest in Hounslow.

Table 12.12: Per Capita Leisure Goods Expenditure in the Three Local Authorities

| Local Authority | 2006 (£) | 2011 (£) | 2016 (£) | 2021 (£) |
|----------------------|----------|----------|----------|----------|
| Ealing | 2,175 | 2,401 | 2,651 | 2,927 |
| Hammersmith & Fulham | 2,687 | 2,966 | 3,275 | 3,616 |
| Hounslow | 2,008 | 2,217 | 2,448 | 2,703 |

Source: Experian Business Solutions, E-marketer, 2006

- 12.58 We have also examined available leisure spend based on the population of three individual local authorities (Table 12.13). Our assessment highlights significant growth in available leisure expenditure between 2006 and 2021.

Table 12.13: Total Leisure Expenditure

| Local Authority | 2006 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) |
|----------------------|-------------|-------------|-------------|-------------|
| Ealing | 651,424 | 728,971 | 815,825 | 912,734 |
| Hammersmith & Fulham | 463,339 | 531,074 | 608,537 | 696,014 |
| Hounslow | 445,133 | 496,512 | 555,698 | 620,756 |

Source: Experian Business Solutions, E-marketer, 2006

- 12.59 Ealing currently has the highest available leisure expenditure out of the three boroughs with £651m currently available in 2006 rising to £912.7m in 2021, an increase of 40.2%. Hammersmith & Fulham is also expected to see a significant rise from its current position of £463m to £696m in 2021. Whilst Hounslow currently has the lowest available leisure spend with £445m in 2006 we expect this to rise to £620.8m in 2021, an increase of 36.4%.
- 12.60 The demand for additional quality leisure facilities will naturally grow as the population increases, and within the catchment area the current network of sub regional centres will remain the main policy focus for leisure growth.

Restaurant/Café Expenditure

- 12.61 According to Experian Business Solutions (2006) the average person spends £1,100 per annum in restaurants/cafes. Experian also estimate that people's average likely spend on leisure goods such as eating out increases by 2% each year. Currently the total spend available for restaurant/cafés in the study area is £1.67bn, increasing to £2.5bn in 2021, as identified in Table 12.14.

Table 12.14: Restaurant / Café Expenditure Forecasts – Total Study Area

| Projection | 2006 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) |
|------------------|-------------|-------------|-------------|-------------|
| Total Study Area | 1,665,667 | 1,922,620 | 2,203,808 | 2,528,881 |

Source: Experian Business Solutions, E-marketer, 2006

- 12.62 On this basis, our assessment highlights sufficient growth in the study area to sustain a circa 33% growth in this sector. Given best practice towards vital and viable town centres, the growing trend towards mixed use town centre schemes discussed in Section 3, and evident strong growth in expenditure in this sector, it is usual today to assume that town centre comparison goods retail schemes will comprise circa 15% of leisure floorspace. Whilst this is a relatively crude assumption, it provides an indication of the level of A3/A4 floorspace which would be included in a new town centre scheme. It is therefore necessary to assume that any identified town centre capacity for comparison goods will be accompanied by 15% of restaurant/café/bar floorspace.
- 12.63 On this basis, Table 12.15 indicates the potential capacity for additional leisure floorspace (Use Class A3/A4) in the each of the 12 larger centres, each West London Authority, and global projections for the three West London Authorities, over the forthcoming LDF period. The figures are outlined below in Table 12.15 (based on comparison capacity forecasts using 4.3% growth and 2% sales efficiency, including commitments).

Table 12.15: Leisure Floorspace Capacity (sq m net)

| Capacity for Leisure A3/A4 Floorspace in West London | 2011 (Sq m net) | 2016 (Sq m net) | 2021 (Sq m net) |
|--|-----------------|-----------------|-----------------|
| Ealing | 49 | 1,839 | 3,886 |
| Acton | 139 | 316 | 521 |
| Hanwell | 10 | 33 | 60 |
| Southall | 0 | 307 | 713 |
| Greenford | 0 | 64 | 171 |
| Hammersmith | 535 | 1,863 | 3,418 |
| Fulham | 319 | 903 | 1,591 |
| Shepherds Bush | 898 | 4,477 | 8,711 |
| Hounslow | 792 | 2,183 | 3,758 |
| Brentford | 3 | 135 | 287 |
| Feltham | 0 | 76 | 330 |
| Chiswick | 171 | 493 | 1,290 |

- 12.64 Clearly the profile of the catchment population, in relation to the proportion of ABs (professional/managerial socio-economic groups), will determine the location, scale and quality of restaurants/cafés in the catchment area. There is strong growth in overall leisure expenditure, and the capacity for town centre schemes supports the argument for more leisure floorspace to meet the need resulting from a growth in expenditure over the LDF period. These figures outlined in Table 10.15 do not include commercial leisure facilities such as cinemas, and only indicate capacity for restaurants, bars and cafes and other similar leisure uses falling within Use Class A3/A4. These figures are over and above committed retail/town centre schemes.

Summary

- 12.65 Our assessment of the leisure sector in West London indicates a reasonable range of commercial leisure facilities including cinemas, bingo clubs, ten-pin bowling destinations, bars, clubs and restaurants, and health and fitness clubs. There are, however, evident gaps and deficiencies in the quality of some facilities.
- 12.66 In terms of cinema provision, there are commitments for a new 16-screen replacement cinema in Ealing, a multiplex cinema in the White City development which we understand could have up to 20 screens, and a 10-12 screen cinema in the new Blenheim Shopping Centre in Hounslow. Our assessment concludes that there is an identified gap in provision in the central and western part of Ealing, and the eastern part of Hounslow. It is clear from the quantitative analysis, that if the three West London Authorities are to bring themselves in line with the UK average a further 21 cinema screens are needed. Assuming only 50% of committed screens serve the three West London Authorities, they will meet the full identified need.
- 12.67 Qualitative gaps in cinema provision will remain, however, in the west of Ealing Borough (Zone 7-10) and the east of Hounslow Borough (Zone 16/17). Provided the sites and investor confidence are present, and they form a suitable addition to enhance a town centre, we consider these parts of the study area could support smaller scale, 4-8 screen cinemas. We do not consider there is a need for additional cinema provision in Hammersmith & Fulham.
- 12.68 In terms of bingo clubs, our assessment identifies that Hounslow is relatively well provided for, but there is a deficiency in provision in qualitative and quantitative terms in the northern part of Hammersmith & Fulham, and the central and western part of Ealing Borough. At present, there are only two ten-pin bowling facilities within the three boroughs, and we conclude that facilities would meet qualitative deficiencies in Hammersmith & Fulham, the western part of Ealing Borough and the eastern part of Hounslow Borough.
- 12.69 There is a wide variety of health and fitness clubs across West London, although provision within a 500m walk-in distance is more dense in the eastern areas in the vicinity of Hammersmith & Fulham, Chiswick, Acton and Ealing. Provision does, however, become less dense in the western part of Ealing and Hounslow Boroughs. Provided the market demand is there, and the sites exist, health & fitness clubs should usually be encouraged within town centres and within mixed-use retail/residential schemes. The market has grown strongly in recent years, and Mintel research predict this trend will continue as

awareness of personal health and fitness becomes more widespread throughout different sectors of the population.

- 12.70 In terms of pubs/clubs, the most popular destinations appear to be Ealing, Richmond, London West End, Chiswick, Hammersmith, Hounslow, Fulham and Twickenham. Local residents are choosing to visit Ealing, Chiswick, Richmond, London Central, Fulham, Twickenham, Hounslow, Harrow and Hammersmith most often for restaurants. There is evidently some leakage to competing town centres to reach alternative evening economy/entertainment destinations. Follow-on work will be required to consider policy recommendations with which to control such uses.
- 12.71 In terms of town centre restaurant/bar facilities, and based on national trends discussed in the background paper (Appendix 18), we assume 15% of comparison goods town centre schemes will comprise A3/A4 leisure floorspace. Based on comparison goods capacity projections (4.3% expenditure growth / 2% sales efficiency scenario), we forecast capacity for an additional 2,559 sq m net of restaurant/bar floorspace in Ealing Borough by 2016; 7,243 sq m net in Hammersmith & Fulham Borough, and 2,887 sq m net in Hounslow Borough.

13. CONCLUSIONS/NEXT STEPS

- 13.1 GVA Grimley was instructed by the three West London Authorities (WLA's) (London Borough of Ealing, Hammersmith & Fulham) to undertake the West London Retail Needs Study. The joint study is driven by a recognition of significant cross border and sub-regional issues. The purpose of the study is to inform and guide town centre/retail planning in West London, and in particular, to input into the preparation of each authority's forthcoming Local Development Framework (LDF). Based on our research, analysis and overall findings, this strategic study specifically identifies the performance of centres and the need for retail and leisure floorspace to 2016, and beyond to 2021.
- 13.2 The study forms a phase 1 baseline piece of work, as the Study Brief did not request advice in respect of site selection, policy recommendations or the development of overall strategies for town centres. It does, however, provide a robust and sound baseline evidence for the three London Boroughs to assess the network of centres and their relationship in the West London hierarchy, as well as the quantitative and qualitative need for new retail and leisure floorspace over the forecast period. We also assess the implications of major new retail schemes coming forward during the early part of the LDF period. Moving forwards, the study will underpin future work elements including policy formulation and monitoring, the development of town centre strategies and the identification and allocation of potential development opportunity sites.
- 13.3 In this Section, we outline the key findings from the baseline analysis, structured as follows:-
- We set the context of the study within national and regional policy guidance;
 - We reiterate the importance of the formulation and findings of the empirical survey data;
 - We summarise our findings in respect of the sub-regional context and competing centres;
 - We set out global capacity projections for comparison and convenience goods;
 - We review the findings at the borough-wide level;
 - We set out the implications of our findings and the next steps for each of the local authorities.

Policy Context

- 13.4 Planning Policy Statement 6 (PPS6) entitled 'Planning for Town Centres' was published in March 2006 and sets out the main issues and guidance relating to planning for the future of town centres and the main uses that relate to them. The key points of relevance to the West London Centres, are:-
- The need to take a more proactive approach to accommodating town centre uses in central locations, including where appropriate promotion of the expansion of town centres; and, conversely a realistic approach to the management of decline where justified; and

- The need to establish a hierarchy of centres in each region and sub-region, with any change in the role and function of centres to be secured as part of the preparation of regional spatial strategies (RSS) and through preparation of the development plans, rather than through individual applications.

- 13.5 The central objective of PPS6 is evidently, therefore, to promote the vitality and viability of town centres by planning for their growth and development. Where development is not suitable, viable and/or available in town centre and/or edge-of-centre locations, then PPS6 promotes the expansion of existing town centre boundaries, where possible. This study provides the baseline to assist the review of town centre boundaries in the next phase of work, which will need to focus on policy recommendations, town centre strategies and site allocations.
- 13.6 The three West London Authorities will also need to demonstrate a much more proactive approach to the planning and expansion of their main centres. PPS6 requires local authorities to plan for improvements to the range of services offered in local centres and to manage decline and change in any centres which can no longer realistically maintain their place in the retail hierarchy. This needs to be applied, in the context of regional policy, at the local level by the three West London Authorities in their Local Development Frameworks (LDF's). In the context of PPS6, follow on work will require the identification and allocation of development sites, along with strategy and policy recommendations. We discuss this in more detail at the end of this Section: The Next Steps.
- 13.7 In terms of regional policy context, the London Plan (2004), is a strategic plan setting out an integrated social, economic and environmental framework for the future development of London in the next 15-20 years. Within the London Retail Hierarchy, Ealing and Hounslow are identified as Metropolitan Centres; Southall, Hammersmith, Fulham and Chiswick are Major Centres; and Acton, Greenford, Hanwell, Shepherd's Bush, Feltham and Brentford are District Centres.
- 13.8 The GLA 'London Wide Comparison and Convenience Goods Floorspace Needs Assessments', developed a range of strategic capacity projections based on different scenarios. The Experian analysis does provide useful baseline data indicating population change and expenditure growth projections on a London-wide basis, and is also helpful in understanding the scale and implications of major schemes in the pipeline. It sets out the network of centres across London which enables an understanding of the scale, distribution and role of centres; and provides an indication of general areas of need for new floorspace.
- 13.9 The studies do not, however, provide the detailed evidence base needed by local authorities for the preparation of LDF policies, or to guide development control decisions at the local level. In accordance with national and GLA recommendations, therefore, this study has been commissioned to ensure a focused qualitative and quantitative assessment at a more localised level, in order to feed into informed sensitivity testing and, eventually, recommendations for development at the local level.

Survey Data/Evidence Base

- 13.10 The importance of a robust evidence base to underpin the Local Development Framework cannot be underestimated. In developing our methodology, we have drawn on established best practice and our
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extensive experience in this field. In particular, GVA Grimley are responsible for preparing the forthcoming DCLG Good Practice Guidance on Retail/Leisure Need and Impact Assessments. This sets out a number of basic guiding principles, including the need for a transparent methodology, and the use of up to date surveys as a means of establishing current shopping patterns, town centre catchments and market shares.

- 13.11 In order provide detailed information on the current shopping patterns in the West London Study Area, we commissioned a new household telephone survey covering 3,000 households across 30 agreed Zones, distributed proportionately to the population in each Zone. Unlike anywhere else in the UK, London is a highly populated urban area with a complex network of centres and varied shopping patterns. Our methodology therefore strongly recommended sufficient zones, of an appropriately small size, to cover the local level and effectively define the catchment areas of centres.
- 13.12 Drawing on our experience, it is clear from our review of shopping patterns and penetration rates, that this process has achieved the robust evidence base required to underpin the Local Development Framework. In addition, the methodology and findings enable the three West London Authorities to review the study area as a whole, but perhaps more importantly, to plan at the local level in terms of policy and development control decisions.

Sub-Regional Context/Competing Centres

- 13.13 The Study has reviewed the relationship of the three West London Authorities with the wider sub-region. In particular, it describes the influence of key competing neighbouring strategic centres on the current and future role of the West London centres. The review drew extensively on the household telephone survey data, discussions with the relevant local authorities, and a number of other in-house data sets and sources.
- 13.14 In terms of the sub-regional context, the Household Telephone Survey identified Kingston, the West End, Uxbridge, Staines, Harrow, Richmond, Kensington High Street, Brent Cross and Kings Road as the key competing centres. It is clear that the West End and Kingston are the greatest threat given their trade draw, scale and quality of retail offer, rents, proximity, rank position and development opportunities coming forward over the forthcoming LDF period.
- 13.15 It is clear that the West End and Kingston have the most significant influence on shopping patterns in the defined study area and are achieving a significant draw of shoppers and spend. This reflects the relative critical mass and quality of their retail offer. This is underlined by their strong Prime Zone rents, their national rankings as shopping destinations and the level of market interest and confidence in their future vitality and viability.
- 13.16 The key performance indicators considered show that Ealing is ahead of many competing centres, as would be expected for a Metropolitan Centre, although it lacks a major department store anchor and high end fashion retailers. However, Hounslow is ranked behind a number of competing centres, despite its metropolitan centre status, and Hammersmith is also out-performing Hounslow on some of the KPIs.

- 13.17 The survey results and KPIs also indicate that the Kings Road, Brent Cross and Richmond provide either a quality/niche retail offer for residents in the West London area, or function as destination/day-out shopping locations. The scale, quality and relatively unique offer of these three shopping locations means that they will continue to represent significant attractions to residents in the three West London authority areas.
- 13.18 Uxbridge, Staines and Harrow function as more mainstream third tier centres. Although they offer less competition to main West London Centres, it is clear that they are achieving a market share of available spend within the defined study area. Nevertheless, there are few major planned retail developments and/or proposals being promoted in these centres. Therefore, through effective strategies and the identification of key development opportunities, it should be possible for the larger centres in the three West London Boroughs to strengthen the scale and quality of their retail offer, thereby providing greater competition to centres such as Kingston, Uxbridge and Staines in the future.
- 13.19 Our review of recent new developments, future commitments and proposals has highlighted the fact that centres in the three West London Authorities face strong and increasing competition from centres in neighbouring authorities and the wider West London area, both in terms of the scale and quality of the competing retail and leisure offer.
- 13.20 The future challenges to the West London centres will be further intensified by the proposals to extend Brent Cross Shopping Centre, as part of the wider Brent Cross/Cricklewood/West Hendon Regeneration Area, as well as the White City and Wembley (Quintain) developments. The scale, character and potential impact of these major new retail schemes on shopping patterns in the West London study area are considered in more detail in the remainder of this study.

Global Capacity Projections

- 13.21 We have forecast capacity projections within the three West London Authorities to the period 2021 for comparison goods floorspace. The methodology has tested the implications of committed developments and incorporated a range of expenditure growth and floorspace efficiency scenarios. On this basis, we have identified capacity for between 201 sq m net and 29,446 sq m net of additional comparison goods floorspace by 2011. This range incorporates all comparison goods proposals and commitments, and is based on current market shares. By 2016, following further population and expenditure growth, we calculate capacity for between 38,808 sq m net and 105,547 sq m net; and by 2021 this is set to grow to between 81,501 sq m net and 195,958 sq m net.
- 13.22 We have undertaken a similar process of scenario testing for convenience goods floorspace. When all commitments have been incorporated we forecast capacity for between 15,848 sq m net and 18,050 sq m net by 2011, growing to 18,607 – 23,048 sq m net by 2016; and again to 21,482 sq m net – 28,370 sq m net by 2021. This is based on a £12,000 sales density, a level most major foodstore operators would aim to achieve.

London Borough of Ealing

13.23 The quantitative headline conclusions for the London Borough of Ealing can be summarised as follows: -

- Zones 4-10 are the best-fit Zones to the Borough boundary;
Comparison Goods
- Available comparison goods expenditure per person (per annum) is higher than the UK average, but lower than the survey area (Zone 1-30) average;
- The competing centres of the West End, Brent Cross, Harrow, Uxbridge, Kingston, Richmond, Kensington, Chelsea and Staines capture £192.3m of comparison goods expenditure from Zone 4-10 (21% market share);
- The West End captures the greatest proportion of this trade (6.8% market share); followed by Brent Cross (4.4%); Harrow (4.2%) and Uxbridge (3.2%);
- The major Borough centres of Ealing, Southall, Acton, Hanwell, Greenford and borough retail warehousing capture £493.2m of comparison goods expenditure from Zone 4-10 (43% market share);
- The remaining 36% of comparison goods expenditure in Zone 4-10 is directed towards other small scale retail provision in the Borough, retail warehouse provision beyond the Borough and other competing centres beyond the Borough not already mentioned above;
- When all commitments have been factored in, we forecast comparison goods floorspace capacity of between -3,027 sq m net to 4,962 sq m net by 2011; growing to between 5,821 sq m net and 24,111 sq m net by 2016; and again to 15,534 sq m net and 46,577 sq m net by 2021. These ranges are based on the expenditure growth and sales efficiency scenarios tested within our methodology.
- The identified comparison goods commitments factored into this assessment, will have an impact on Ealing town centre (13.4%); Acton town centre (2%); Greenford town centre (16.1%) and Hanwell town centre (7.6%);
- In particular, the White City scheme currently under construction will certainly exacerbate and increase trade leakage from Ealing Metropolitan Centre if no investment and development comes forward in Ealing Broadway. There is a need for an increase in the critical mass/quality of retail provision in Ealing to help claw back a proportion of shoppers and spend, and consequently increase market share and consolidate the centres position as a Metropolitan Centre.
- Taking on board proposals for the Southall Gas Works site, we forecast that the scheme will have a positive impact on market share in Zone 10, although the impact of the scheme on the town centre should be reviewed in detail when proposals are finalised. This Study has reviewed the uplift of market share in Zone 10 (which comprises Southall town centre and the Gas Works site), but there could be a negative impact on the town centre depending on scheme composition and linkages. The next steps should review this carefully.

Convenience Goods

- Available convenience goods expenditure is lower than both the UK and survey area (Zone 1-30) average;
- Convenience goods floorspace within the Borough captures 62% of available convenience goods expenditure within Zones 4-10. The remaining expenditure leaves the Borough as leakage;
- Factoring in all known commitments, we forecast capacity for up to 7,644 sq m net of convenience goods floorspace by 2011, growing to 9,100 sq m net by 2016, and again to 10,648 sq m net by 2021. This assumes a £12,000 per sq m net sales density.

London Borough of Hammersmith & Fulham

13.24 The quantitative headline conclusions for the London Borough of Hammersmith & Fulham can be summarised as follows:-

- Zones 1 to 3 are the best fit zones to the Borough boundary;

Comparison Goods

- Available comparison goods expenditure per person (per annum) is higher than both the UK average and survey area (zone 1-30) average;
- The competing centres of the West End, Kensington, Chelsea, Kingston, Brent Cross, Richmond, Harrow and Uxbridge capture £194.8m of comparison goods expenditure from zone 1-3 (30%) market share; the West End captures the greatest proportion of this trade (15.1 % market share); followed by Kensington (7.7%); Chelsea (3.6%) and Kingston (1.7%);
- The major borough centres of Hammersmith, Fulham and Shepherd's Bush and all borough retail warehousing, capture £261.4m of comparison goods expenditure from zone 1-3 (31% market share);
- The remaining 39% of comparison goods expenditure in zone 1-3 is directed towards other small scale retail provision in the Borough, retail warehouse provision beyond the Borough and other competing centres beyond the Borough not already mentioned above;
- After all comparison goods commitments have been factored into the model we forecast a borough wide floorspace capacity of between 21,698 sq m net and 52,445 sq m net by 2016. This is forecast to grow to between 44,777 sq m net and 98,005 sq m net by 2021. These ranges are underpinned by scenario testing of expenditure growth rates and floorspace sufficiency.
- The comparison goods commitments identified will have a negative impact on Hammersmith & Fulham of 11.6% and 7.8% respectively.
- The implementation of White City will, however, have a largest positive impact on any of the larger centres, achieving an overall turnover of £664m by 2011, equating to a positive impact of 654.5%.

Convenience Goods

- Like comparison goods, spend per capita for convenience goods is higher than both the UK and survey area (zones 1-30) average;
- Convenience goods floorspace within the Borough captures 57.9% of available convenience goods expenditure within zones 1-30. The remaining expenditure leaves the borough as leakage;
- Following the implementation of commitments, capacity projections indicate capacity for up to 2,478 sq m net by 2011, growing to 4,074 sq m net by 2016, and again to 5,805 sq m net by 2021. This is based on a £12,000 per sq m net sales density.

London Borough of Hounslow

13.25 The quantitative headline conclusions for the London Borough of Hounslow can be summarised as follows:

- Zones 11-17 are the best fit zones to the borough boundary;

Comparison Goods

- Available comparison goods expenditure per person (per annum) is higher than the UK average, but lower than the survey area (Zones 1-30) average;
- The competing centres of Kingston, the West End, Staines, Richmond, Brent Cross, Kensington, Uxbridge, Chelsea and Harrow capture £184.4m of comparison goods expenditure from zone 11 to 17 (27% market share);
- Kingston captures the greatest proportion of this trade (11.5% market share); followed by the West End (5.4%); Staines (4.4%) and Richmond (3.5%); the major borough centres of Hounslow, Feltham, Chiswick and Brentford, and borough retail warehousing provision, capture £354m of comparison goods expenditure from Zone 11-17 (41.5% market share); the remaining 31.5% of comparison goods expenditure in Zone 11-17 is directed to other small scale retail provision in the borough, retail warehouse provision beyond the borough and other competing centres beyond the borough not already mentioned above;
- When all comparison goods commitments have been factored in, and based on scenario testing of expenditure growth rates and sales efficiency rates; we forecast capacity for between 2,067 sq m net and 9,728 sq m net by 2011. This is forecast to grow to 11,289 sq m net and 28,991 sq m net by 2016 and again to 21,190 sq m net and 51,376 sq m net by 2021.
- The commitments for comparison goods floorspace identified within this study will have a negative impact on Brentford and Chiswick town centres, of 12.9% and 8.6% respectively.
- In contrast, due to new town centre schemes coming forward we calculate a positive impact on Hounslow and Feltham town centres, of 28.3% and 80.1% respectively.

Convenience Goods

- Available convenience goods expenditure per person (per annum) is lower than both the UK and survey area (Zone 11-17) average;
- Convenience goods floorspace has a stronger influence in the Borough of Hounslow and Ealing and Hammersmith & Fulham, and such floorspace within the Borough captures 76.7% of available convenience goods expenditure within zones 11-17. The remaining expenditure leaves the borough as leakage;
- Once all commitments have been factored in, we forecast capacity for up to 3,347 sq m net of additional convenience goods floorspace by 2011, growing to 5,294 sq m net by 2016, and again to 7,434 sq m net by 2021. This is based on a £12,000 per sq m sales density;
- Focusing on the four major study centres, it is clear that capacity for new foodstore provision arises in Chiswick town centre and Brentford town centre, although there is no identified capacity by 2021 in Hounslow or Feltham town centres.

Implications

- 13.26 This study has clearly set out capacity first globally, second by Borough, and third within each of the 12 major study centres. We have reviewed the sub-regional context, inflows and outflows of trade, trade retention and baseline capacity projections up to 2021 excluding commitments. We then tested a series of expenditure growth scenarios and sales efficiency levels, and set out the impact of commitments on capacity. Our understanding of the network of centres and their vitality and viability, developed throughout this study, has been crucial in our review of the implications of commitments (or impact).
- 13.27 The findings of our analysis have effectively demonstrated that where major schemes are being implemented, the market share of that centre will be substantially enhanced, strengthening the position of that centre in the hierarchy. Likewise, where centres have no schemes coming forward, i.e. a 'do nothing' scenario, the market share declines and capacity for new floorspace declines. For example, Hounslow, Shepherd's Bush and Feltham all have commitments coming forward which have strengthened their market share. In contrast, Ealing, Acton, Greenford, Hanwell, Hammersmith, Fulham, Brentford and Chiswick currently have no committed schemes. Southall Gas Works will enhance market share in Zone 10 and impact on capacity in the larger West London centres through claw back of trade, although the impact on Southall town centre should be carefully reviewed when proposals are finalised.
- 13.28 It is important to point out that capacity projections set out in this report should not deter new development coming forward over and above the identified capacity figures. Indeed, new development and improvements to town centres and their overall retail and leisure offer, which would enhance market share, should be encouraged. In a 'do nothing' scenario, centres will decline and be unable to hold their position in the retail hierarchy. Other factors do, however, need to be taken into consideration, and follow-on work should develop strategies for centres which start to focus on the commercial perspective, for example discussions with developers and reviewing the viability of sites.

- 13.29 Informed by this piece of work, which sets out the baseline position, the opportunities and threats raised by committed development, and the role and relationship of centres, the three local authorities now need to focus on policy formulation and the means to enhance their town centres. It is now important to 'marry up' economic capacity forecasts and physical capacity, focusing on site availability, developer interest, site viability and timescales. If the sites are available and viable, there is no barrier to each local authority developing schemes which in turn will enhance market share, enabling a greater level of floorspace to be supported.

Next Steps

- 13.30 Drawing on the key findings and recommendations of the Retail Study, we briefly set out below some of our recommendations as to the 'next steps' for the boroughs to consider, either jointly or individually, by way of a natural follow-up and extension to our work.
- 13.31 We consider that the next important step for each of the boroughs is to identify where the forecast capacity for new retail and commercial leisure floorspace should be accommodated. PPS6 is clear that the aim should be to locate the appropriate type and scale of development in the right type of centre to ensure that it fits into that centre and that it complements its role and function. In terms of the sequential approach, it is also clear that all options in existing centres (including, where necessary, the extension of centres) should be thoroughly assessed first before less central sites are considered for the development of main town centre uses.
- 13.32 Each of the boroughs should take a more proactive and positive approach to site identification and development, working closely with developers, businesses, the community and other key stakeholders to identify and assess appropriate sites for allocation in their development plan documents. In planning for growth in their town centres, each authority should allocate sufficient sites to meet the identified need (and market demand) for at least the first five years from the adoption of their development plan documents. The West London boroughs should also, where appropriate, include policies and proposals in their development plan documents for the phasing and release of development sites. In specific cases they may need to help deliver development through site assembly and, where necessary, the use of their CPO powers.
- 13.33 This 'marrying up' of economic capacity, with the 'physical capacity' of centres to accommodate the forecast need for new retail and leisure floorspace represents a major challenge for local planning authorities across the UK. This is a particular challenge in those centres where the local authority has little or no ownership, where there are constraints to new development and/or there is no scope to extend primary shopping areas and town centre boundaries. Even where sequential sites are identified to meet need, local planning authorities face the challenge of delivering high quality new mixed use development, that improves the health, vitality and economic potential of their centres during the daytime and evenings.
- 13.34 In the face of these "challenges", we strongly recommend that each West London borough prepare robust strategies for those centres where strategies do not already exist, or have not yet been commissioned. In accordance with good practice, such strategies would need to be underpinned by

detailed consultation and partnership-working with the private sector, key public sector bodies, the community and other stakeholders. The aim should be to deliver sound and robust visions, strategies, action and implementation plans that help to deliver the effective management, promotion and development of town centres. It is fundamental that these strategies are commercially viable and deliverable, whilst at the same time being underpinned by a high quality design, transport and sustainability framework.

- 13.35 In our experience the development of sound, robust, effective and deliverable strategies will necessarily require a joined-up approach across the West London boroughs, building on the findings and recommendations of our Retail Needs Study. It will also require a joined-up approach within each individual local authority to ensure that key individuals and teams (including planning, economic development, regeneration, housing, transport, etc.) are working towards the same objectives. Without strong leadership, political support, joined-up thinking and realistic objectives, the strategies will (in our experience) fail to deliver what they set out to achieve.