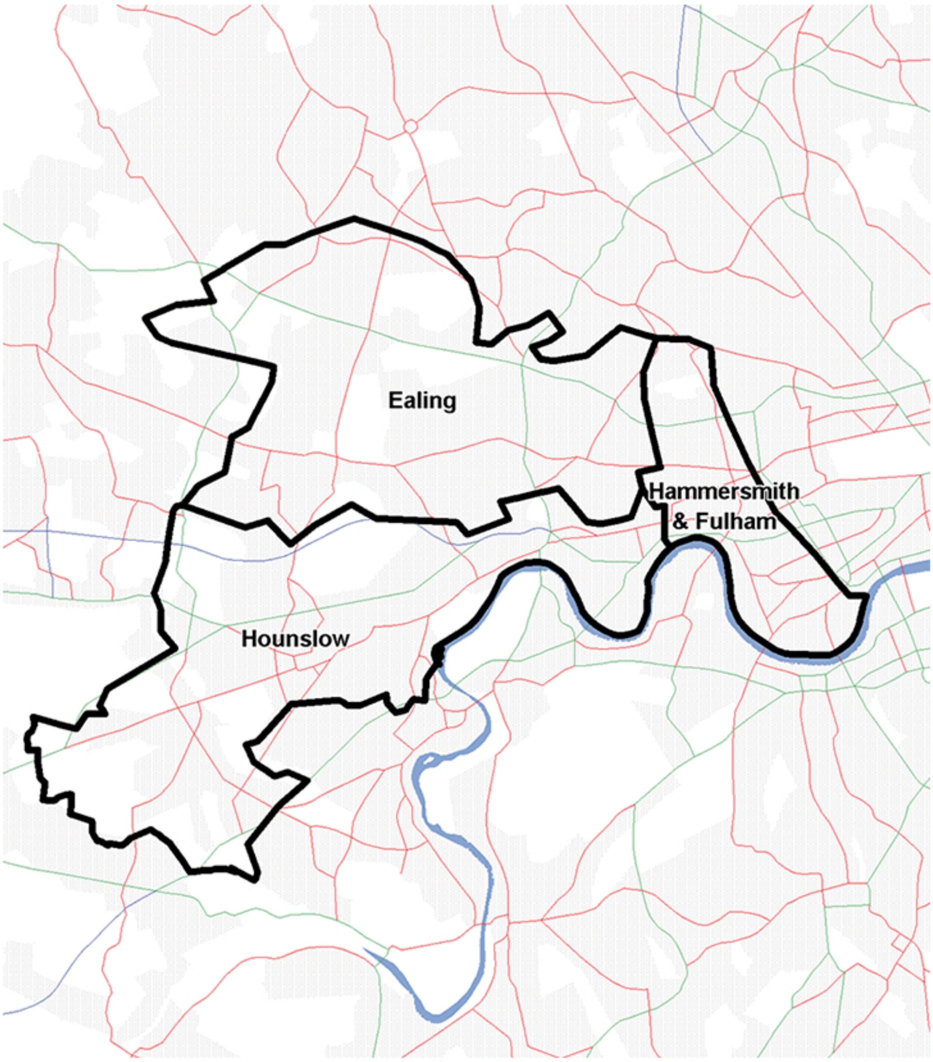
GVA Grimley

WEST LONDON
RETAIL NEEDS STUDY 2006

London Boroughs of Ealing, Hounslow and Hammersmith & Fulham

Volume 1: Plans & Appendices



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APPENDIX 1:

LONDON BOROUGH OF EALING: ADOPTED UDP POLICIES 2004

LONDON BOROUGH OF EALING: UNITARY DEVELOPMENT PLAN ADOPTED 12 OCTOBER 2004

SHOPPING AND TOWN CENTRES

7.1 Promoting and Enhancing a Network of Centres and Promoting Key Sites

1. The Council will seek to maintain, and where necessary improve the function, character, vitality and viability of the established shopping hierarchy, by recognising the distinctive function of:

    (i) Metropolitan;
    (ii) Major;
    (iii) District and neighbourhood centres; and
    (iv) Local parades.

2. In order to achieve this, the Council will endeavour to achieve the highest quality environment and surroundings for all who use the borough's Shopping Centres.

3. The Council will also encourage appropriate development on key sites within the town centres of Ealing, Southall, Acton, Greenford and Hanwell, including about 16,500 sq. m of new net retail floorspace in Ealing metropolitan centre (Ealing Broadway – about 13,000 sq m and West Ealing – about 3,500 sq m).

Table 7A Definition of the Shopping Hierarchy
Primary Source: The London Plan, Annex 1, 2004

Centre Type and Classification	LBE Centre	
Shopping Centre: A general term to describe all types of retail centre.		
Metropolitan Centres: Outstanding shopping centres found in outer London, typically having more than 100,000 sqm of retail floorspace and a high level of comparison shopping, including a broad range of multiple retailers and several department stores. Most have developed complementary activities that draw people in outside peak shopping hours.	Ealing	
Major Centres: Important shopping and service centres, but are typically smaller in scale and closer together than those in the metropolitan category. They usually have at least 50,000 sq m of retail floorspace and some may have developed specialist roles. With sizeable local catchment areas, many of these centres have established cultural and entertainment facilities that will keep them alive in the evenings.	Southall	
District Centres: Ranging in size from 10,000 – 50,000 sq m of retail floorspace, these centres provide convenience and services for local customers with comparison shopping floorspace rarely exceeding 50% of the total. The majority of people that use them are on foot, although access by car and public transport needs to be provided for. Some have individual specialist functions due to their lower rent.	Acton Greenford Hanwell	
Town Centres: A term used to describe the larger centres within the Borough, i.e. Ealing, Southall, Acton, Greenford and Hanwell.		
Neighbourhood Centres: Provide a variety of convenience shops, a proportion of comparison shops, and a number of shops providing essential	East Acton Northfields Northolt	South Ealing Sudbury Hill Park Royal

local services.	Perivale Pitshanger	West Way Cross
Local Centre / Single Units: Composed mainly of convenience and service shops and a very limited amount of comparison shops.		

7.2 New Shopping Development and the Sequential Approach

1. The Council expects al significant new development of shopping and other key town centre uses to take place in existing centres, at a scale appropriate to their position in the shopping hierarchy. Where shopping and other key town centre uses are proposed outside an existing centre, account will be taken of retail need, the sequential approach, and the effect on the vitality and viability of existing centres.

2. Only where a need for additional retail floorspace has been established, and a suitable site is not available in a centre or on the edge of a centre, may it be appropriate to combine the proposal with an existing out of centre retail area and negotiate public transport improvements.

3. In considering all retail development proposals, the Council will require that development is suitable in terms of its design, including scale, integration, mix and character. There should also be an acceptable traffic impact, including the minimisation of car borne traffic and very good public transport, cycle and pedestrian accessibility.

7.3 Designated Shopping Frontages

1. In all designated frontage any loss of shopping floorspace (A1), which serves the interests of shoppers, visitors and residents, will not normally be permitted.

7.4 Non-Designated Shopping Frontages

1. In non-designated frontages, changes to use of non-retail uses will normally be acceptable where this does not have an adverse effect on retail activity or residential amenity, does not result in over-concentration of non-retail uses creating dead frontage, and provided that:

   (i) The proposed use contributes to the functions of the centre. Acceptable uses include financial and professional services (A2), food and drink uses (A3) and appropriate community facilities, though other uses may be considered favourably in frontages which are on the fringes of the centre;
   (ii) The Council is satisfied that there is no damage to the environment or amenity from noise, fumes, traffic, litter, refuse or general disturbance;
   (iii) A net loss of residential accommodation does not occur on upper floors.

2. Within Town and Neighbourhood Centres, residential accommodation will only be appropriate in units on the edge of non-designated frontages, adjacent to existing residential property, and where there is evidence of long term vacancy.

7.5 Basic Shopping Needs

1. The Council will resist the loss of existing shops where this would result in the surrounding area being more than 400 metres from the nearest occupied, operational retail shop.

7.6 Eating, Drinking and Entertainment

1. When considering proposals for eating, drinking and entertainment uses (both new premises and extensions), the Council will have particular regard to the impact on amenity, and proposals will be considered in relation to the following criteria:

   (i) The concentration of eating, drinking and entertainment uses;
   (ii) The location of the proposal;
   (iii) The proximity of residential accommodation;
   (iv) The preservation of the appearance and character of the area;
   (v) The existing level of disturbance from eating, drinking and entertainment uses;
   (vi) The negative impact from the proposed hours of operation;
   (vii) The traffic implications including public transport accessibility;
   (viii) The arrangements provided for any likely pollution, including ventilation equipment, refuse disposal (including customer litter), grease traps, and noise insulation.

2. Where considered necessary, when permission is given for the sale of food or drink for consumption <u>on</u> the premises, specific consent will be required for future use for the sale of hot food for consumption <u>off</u> the premises, if the proposal complies with all the criteria listed above.

3. Within Central Ealing, where applications for restaurants and cafes are consistent with the above criteria, the Council will normally restrict the proposal to that use, and require specific consent when a change of use is proposed to a pub or a club.

7.7 Other Shopping Centre Uses

1. When considering other Shopping Centre uses the Council will normally refuse any change of use that:

   (i) will have an adverse effect on neighbouring residential accommodation;
   (ii) will cause disturbance in terms of noise, smells, fumes or other environmental damage;
   (iii) will create adverse traffic impacts.

2. Amusement Centres will only be permitted provided that:

   (i) the proposal will not cause a detrimental impact to adjacent residential accommodation;
   (ii) the proposal is not located near to a school, youth facility, place of worship or hotel;
   (iii) the proposal would not be detrimental to a Conservation Area or other area of special architectural or historic interest it is within.

7.8 Markets and Street Trading

1. The Council will support the existence of market stalls on appropriate sites in town centres.

2. When considering the proposals for street markets the Council will have regard to the following criteria:

   (i) Maintaining the vitality and viability of the existing town centre;
   (ii) The minimisation of local environmental impacts, especially with regard to the amenities of nearby residents;
   (iii) The impact on existing transport infrastructure, particularly parking and pedestrian flows;
   (iv) The adequacy of the arrangements for access, servicing, recycling and refuse disposal.

APPENDIX 2:

LONDON BOROUGH OF HAMMERSMITH & FULHAM: ADOPTED UDP POLICIES 2003

LONDON BOROUGH OF HAMMERSMITH & FULHAM: UNITARY DEVELOPMENT PLAN ADOPTED AUGUST 2003

SHOPPING POLICIES

SH1 Retention of a Class Floorspace

The Council will seek to retain and improve accommodation suitable for A class uses. In town centres and key local centres, where redevelopment is necessary, replacement A Class floorspace will normally be required. Outside these centres the Council will normally require replacement A Class floorspace, unless there is satisfactory alternative shopping provision. Replacement A Class floorspace will be in accordance with other policies.

SH3 Key Local Shopping Centres

The Council has designated Key Local Shopping Centres (shown on the proposals map and listed in Appendix 9.2) to provide accessible shopping and service facilities for their locality. In these centres, uses within Class A2 or A3 will be permitted on the following basis:

(a) no more than one third of the length of the key local shopping centre frontage as a whole, and no more than one third of the frontage in an individual street block, should be occupied by non-Class A1 uses;
(b) no more than 20% of the length of an individual street block should be in food and drink use (A3 Class);
(c) provision of a shop style fascia, with an appropriate window display, at ground floor level.

Other uses will be permitted subject to a), b) and c) and provided that they are complementary to the function of the centre.

In all calculations of the proportion of the frontage of street blocks in Class A1 and non-A1 uses, the Council will take into account unimplemented planning permissions for changes of use.

SH3A Other Retail Premises Outside Town Centres and Key Local Shopping Centres

1. In the retail parades and clusters shown in Appendix 9.3 and shown on the Proposals Map no more than 50% of the total length of the frontage of the parade or cluster will be permitted to change to non-retail use (non A1 Use Class). In addition, no more than 33% of the length of the frontage of the parade or cluster will be permitted to change to food and drink use (A3 Class). Residential use will not be permitted on the ground floor.

2. In retail premises outside town centres, key local shopping centres and protected parades and clusters shown in Appendix 9.3, the Council will apply the same quota figures for non-retail use and food and drink use as applied to protected parades and clusters, but may also permit residential use where it would not result in a demonstrable shortage of A1 Use Class accommodation in the locality. Changes to other non-A Class uses will be considered on the same basis.

3. Corner shops are important for meeting local needs and will be protected for continued retail use (A1 Class). Changes of use from retail use will not be permitted where there is a shortage of alternative shopping (where town centres, key local shopping centres and protected parades and clusters are not within 300 metres).

SH5 Floors above Shops and Other Premises

In any development affecting ground floor premises which are used independently of any floors above, the Council will normally seek the retention, or provision, of independent access for any upper floors capable of viable independent use.

SH7 Shop Extensions/Improvements within Town Centre and Elsewhere

Proposals for extension or improvement of existing retail premises, for retail uses, will normally be given favourable consideration, provided that there will be no adverse impact on the vitality and viability of existing town centres and key local shopping centres.

Any significant floorspace extensions will be considered against policy SH9.

SH8 Access To and Within the Town Centres

The Council will seek to enhance the attractiveness of the town centres, by provision of adequate short-stay parking for shoppers in controlled parking and off-street parking schemes, promoting better facilities within the centres for pedestrians and people with disabilities, and seeking improvements in servicing for retail premises. The Council will also seek to improve access to the town centres, by pressing Transport for London to improve public transport services.

SH9 Major New Shopping Development

Major new shopping developments will be permitted outside the town centres only if there is demonstrable quantitative and qualitative need for additional retail facilities and no town centre site or building is suitable and available. If no edge-of-centre or, failing that, key local shopping centre site or building is suitable and available, permission will be granted for an out-of-centre site or building if it:

(a) would not prejudice the retail strategy of the plan; and
(b) is accessible by a choice of means of transport; and
(c) would not undermine the vitality or viability of nearby town centres, whether individually or cumulatively with other recently completed or permitted retail developments within their respective catchment areas.

SH9A Night-Time Shopping

Planning permissions for Class A1 development, including new development, changes of use and extensions, will be subject to conditions controlling hours of operation, as follows:

(a) Except in predominantly commercial areas, such as parts of town centres, premises shall not be open to customers later than the hour of 2300;
(b) Within predominantly commercial areas, such as parts of town centres, premises shall not be open to customers later than the hour of 2400.

Extended opening may be permitted where:

(i) The activities would not be likely to cause impact especially on local residents, and that, if there is potential to cause adverse impact, appropriate measures will be put in place to prevent it; and
(ii) There will not be any increase in the cumulative impact from these or similar activities, on an adjacent residential area; and
(iii) There is a particularly high level of public transport accessibility to and from the premises at appropriate times; and

(iv) The activity will not be likely to lead to a demonstrable increase in car parking demand in surrounding residential streets and roads forming part of the Strategic London Road Network or the London Bus Priority Network.

Where a use will impact on amenity, the council will also set an appropriate start time.

SH11 Food and Drink Establishments

Planning permissions for use Class A3 food and drink establishments will be subject to conditions controlling hours of operation, as follows:

(a) expert in predominantly commercial areas, such as parts of town centres, premises shall not be open to customers later than the hour of 2300;
(b) within predominantly commercial areas, such as parts of town centres, premises shall not be open to customers later than the hour of 2400.

Extended opening may be permitted where:

(i) the activities would not be likely to cause impact especially on local residents, and that, if there is potential to cause adverse impact, appropriate measures will be put in place to prevent it; and
(ii) there will not be any increase in the cumulative impact from these or similar activities, on an adjacent residential area; and
(iii) there is a particularly high level of public transport accessibility to and from the premises at appropriate times; and
(iv) the activity will not be likely to lead to a demonstrable increase in car parking demand in surrounding residential streets and roads forming part of the Strategic London Road Network or the London Bus Priority Network.

In additional subject to the location of the proposals, the Council will consider the type of activities appropriate to the A3 premises, and apply conditions on uses where these are appropriate.

Where a use will impact on amenity, the council will also set an appropriate start time.

Proposals must also comply with development standard S.24 of chapter 12 of this Plan.

SH12 Temporary Markets

The council is not opposed in principle to temporary markets, but in considering applications on their merits it will need to be satisfied that the proposal will not adversely affect the amenities of the surrounding area.

STRATEGY

POLICIES WHICH APPLY TO ALL THREE TOWN CENTRES

TC1 Major Developments

The preferred location for developments which are major generators of travel and transport demand is within town centres.

Major new shopping development will be permitted on town centre sites other than Chapter 11 site proposals, only if there is a demonstrable quantitative and qualitative need for additional retail facilities and the proposal would not prejudice the retail strategy of the plan.

TC2 Prime Retail Frontages in Town Centres

1. Within the prime retail frontages shown on the Proposals Map and identified in Appendix 9.1, permission will not be granted for any change of use that would result in loss of class A1 floorspace, or reduction in the proportion of the length of frontage in class A1 use at street level.

(a) In Hammersmith town centre, between 1-93 King Street and on the north side of King Street between Hammersmith Grove and Leamore Street.

(b) In Fulham town centre, between 312-406 and 417-445 North End Road, and 1-19a and 2-24 Jerdan Place.

2. Elsewhere within the prime frontages, changes out of A1 floorspace or a reduction in the proportion of the length or a reduction in the proportion of the length of frontage in A1 will only be permitted for class A2 and A3 uses at street level if:

(a) no more than 33% of the length of the prime retail frontage as whole and no more than 33% of the length of the frontage in an individual street block (including in enclosed purpose built shopping centres and in malls) would be occupied by uses other than those within Class A1.

(b) No more than 20% of the length of an individual street block in any part of the prime retail frontage would be in class A3 uses (except in Shepherd's Bush where the maximum percentage will be 33%);

(c) Other than in enclosed purpose-built shopping centres or in malls, no more than two adjoining premises or a frontage in excess of 15 metres, whichever is the lesser width of frontage, would be occupied by uses other than those within Class A1.

3. Planning conditions will be imposed in any permission for such changes of use to secure provision of a shop style fascia, and window display, at street level, and to control the hours of opening of Class A3 uses.

4. In all calculations of the proportion of the frontage of street blocks in Class A1 and non-A1 uses, unimplemented changes of use will be taken into account.

TC3 Other Retail Premises Outside Prime Retail Frontages

Changes out of A Class in non-prime retail frontage premises will not be permitted except for uses which can be shown to be complementary to the shopping frontage and maintain or increase the vitality and viability of the town centre. Permission will not be granted for change of use of existing Class A shops that would result in more than 50% of the length of frontage of any one street block being occupied by uses other than those within Class A1, or more than 33% of the length of frontage of an individual street block being in Class A3 use.

TC5 Business and Other Employment Generating Uses

1. Permission will not be granted for development involving the loss of land or floorspace in class B or other similar employment use.

2. Development for B class and other employment generating uses will only be permitted if:
(a) there would be no loss of shopping, leisure, entertainment, community services or housing floorspace and, in the case of office schemes of more than 2,500 sq m, the proposal includes shopping and/ or leisure and/or entertainment and/or community service uses or, if adjacent to a predominantly residential area, affordable housing; and

(c) class A1 retail use is included at street level as part of any scheme within the prime shopping frontages where, in accordance with policy TC2 there is an existing under-representation of class A1 uses.

TC6 Housing

(a) Planning permission will not be granted for developments which would result in a loss of residential accommodation in town centres, in accordance with policy HO1.

(b) There will be a presumption that affordable housing will be provided in conjunction with any proposal which is exclusively for housing or includes housing, in accordance with policy HO5.

(c) Where residential development is acceptable, a higher residential density than provided for in development standard S2 will only be permitted, if environmental quality, residential amenity and public safety is not compromised and subject to policy HO7.

(d) Where residential development is acceptable, developments that have no off-street car parking or a reduced level of car parking will only be permitted if it can be ensured that this will not give rise to additional on-street parking demand.

(e) Change to residential use of existing floorspace above ground floor town centre premises will only be permitted if this does not give rise to the displacement of existing businesses, or to the loss of premises last used for, and suitable for continued use for, business activity.

TC8 Town Centre Development and Infrastructure Provision

Where proposals for development would create a direct need for additional or improved infrastructure provision, services and facilities, or for environmental improvement, planning conditions may be imposed or developer contributions sought to secure provision of the necessary additions or improvements. In addition, where appropriate, obligations will be used to enhance the quality of development and the wider environment, and to ensure it makes a positive contribution to sustainable development, providing social, economic and environmental benefits to the community as a whole.

HAMMERSMITH

HTC1 Offices

The preferred location for major Class B1(a) office development of 2,500 sqm and above is in Hammersmith town centre.

HTC4 Hammersmith Market

Development will not be permitted if it would prevent the use of the Lyric Square for market use.

HTC7 Site Proposals

Site 27 Hammersmith and City Line Station Car Park
Owner: LRT
Area: 0.63 hectares

A mixed use development including shopping, B1 offices and community services (including arts or cultural or entertainment or recreation activities).

Site F Hammersmith Palais Shepherd's Bush Road
Owner: Private
Size: 0.41 ha

Leisure uses with or without other appropriate town centre uses.

Site G Wimpeys 26-28 Hammersmith Grove
Owner: Private
Size: 1.014 ha

B1 office with the possibility of other use appropriate to Hammersmith town centre.

FULHAM

FTC1 Business

The town centre is a suitable location for smaller B1(a) development, normally as part of mixed use schemes.

FTC4 Street Market

The council will support the retention and improvement of the existing street market in Fulham, together with the improvement of storage facilities.

FTC8 Site Proposals

Site 63A Coomer Place (southside)
Owner: Council/Private
Area : 0.34 hectares

B1 or residential, with appropriate town centre use of listed building; enhancement of the appearance of the Crowthers building and its forecourt.

Site 63B Coomer Place (northside)
Owner: Council/Private
Area: 0.25 hectares

Market stores, car park and realigned Coomer Road and Mews.

SHEPHERD'S BUSH

SBTC3 Shepherd's Bush Market

The Council will support the retention and improvement of the existing market in Shepherd's Bush.

SBTC5 Environmental and Transport Improvements

The council will continue with the White City SRB programme of environmental and transport improvements for the town centre and will expect development schemes where appropriate to contribute to this programme, either directly through on-site improvements or indirectly as part of wider improvement projects.

SBTC6 Site Proposals

Site 36 White City Centre Site
Owner: LRT and Private
Area: 16.20 hectares

Major shopping centre, B1 uses, workshops, entertainment (including cinema), affordable housing, shoppers' creche, workplace nursery, public open space, nature conservation area with construction of an access from the A3220, retention and refurbishment of the listed building in an appropriate setting.

APPENDIX 3:

LONDON BOROUGH OF HOUNSLOW: ADOPTED UDP POLICIES 2003

LONDON BOROUGH OF HOUNSLOW: UNITARY DEVELOPMENT PLAN ADOPTED 12 DECEMBER 2004

COMMUNITY AND LEISURE POLICIES

C.1.3 Existing Social and Community Facilities

The loss of existing social and community facilities (such as community centres, youth clubs and public houses) will be resisted. In the case of established facilities which serve as a meeting place or focal point for the local community, it will need to be demonstrated that the potential for alternative community use has been fully explored before any change of use is considered.

C.5.1 New Leisure Development

In considering applications for new leisure development the Council will adopt a sequential test approach whereby new leisure development, in particular high trip generating leisure uses, should be located within existing town centres. Where town centre sites or buildings suitable for conversion are not available, edge of centre sites, followed by district and town centres should be considered next. Small scale uses such as pubs and restaurants may be located in local centres. Only following the consideration of these locations, should other locations be considered, and only then where they are, or will be made highly accessible by public transport.

Where leisure development is proposed the Council will take the following into account:

(i) suitability of the proposed use to the location;

(ii) the availability of alternative sites and the impact of the proposed use on existing provision in the Borough;

(iii) the impact of the proposed use on car traffic/trip generation, highway safety and movement;

(iv) the scale, design and intensity of the proposed use and its impact on local character, amenity and environment;

(v) provision of appropriate access for people with impaired mobility;

(vi) accessibility by a range of transport modes, particularly by foot, bicycle, and public transport;

(vii) Supplementary Planning Guidance in the form of town centre strategies, as set out in Policies IMP.2.1 to IMP.2.4.

C.5.1a New Stadia

In considering applications for large scale, all seater stadia in the Borough, the Council will adopt a sequential test approach to ensure that a new stadium is highly accessible by sustainable transport modes. Where a stadium is proposed the Council will take the following into account:

(i) the Stadium is in a suitable location where the proposed activities and the large number of visitors would not conflict with the local environment, amenity and neighbouring uses;

(i) the site is highly accessible by public transport, other non-car modes and appropriate provision is made for coach parking;

(ii) the impact of the proposed stadium on trip generation, highway safety and movement;

(iii) the effect of the proposed stadium on residential amenity;

(iv) the provision of safe, well-lit, pedestrian access;

(v) provision of appropriate access for people with impaired mobility;

(vi) high quality design to incorporate safe entry and exit for a large number of visitors, comfort, safety and public order;

(vii) provision of appropriate on-site amenities for visitors;

(viii) assessment of the implications of any multiple use and non-sporting activities to the environment and community;

(ix) the use of high quality design and materials.

C.5.2 Existing Indoor Recreation Facilities

Planning permission will not normally be granted for a development or change of use which would result in the loss of private or public indoor recreation or leisure facilities.

C.5.4 New Small Private Sports And Leisure Facilities

The Council will encourage the provision of, and improvement to, private sports and other recreational facilities, of an appropriate scale in suitable locations, subject to compliance with other planning policies, and seek to secure agreements for the public use of private facilities for all local groups, where appropriate. The provision of outdoor play areas in association with new housing developments will be encouraged (See Policy H.4.4).

C.6.1 Arts, Cultural And Entertainment Retention

The Council will oppose the redevelopment of arts, cultural and entertainment facilities for other uses unless a redevelopment includes provision for replacement facilities on site.

C.6.2 Provision Of New Arts, Cultural, Entertainment And Library Facilities

The Council will seek to enhance the facilities for art, culture and entertainment within the Borough (for example through the Percent for Arts initiative) and encourage proposals for the provision of new suitable facilities, particularly in areas of deficiency, subject to compliance with other planning policies.

C.6.3 Libraries

The Council will, within its financial constraints, endeavour to provide a distribution of libraries within the Borough which is consistent with the needs of users, and to provide libraries which are locally accessible for all. Proposals which enhance library facilities will be encouraged, particularly when considering mixed use developments in centres with good public transport access.

SHOPPING POLICIES

S.1.1 Main Shopping Areas

The Council will seek to maintain and enhance the main shopping areas (Hounslow, Chiswick, Feltham, Brentford, Hounslow West and Bedfont - see Shopping Hierarchy Table S.1) by allowing expansion of shopping facilities and resisting non-retail uses in inappropriate locations *(*See Policies S.1.2, S1.3 and S.1.4). All proposals will be considered having regard to the existing hierarchy of centres within the Borough and West London generally.

S.1.2 Non-Retail Uses In Primary Frontages

Within primary frontages in main shopping areas (as defined on the Proposals Map and in Tables S.1 and S.2) the Council will generally resist a change of use from retail where the proposed use would not contribute to the character, vitality and viability of the centre. The acceptability of further non-retail use will not be made solely by reference to the number of outlets, proportions of floorspace or lengths of frontages but will take account of the following criteria:

(i) the likely impact on the retail function of the parade and its effect on the character, vitality and viability of the centre within the prime shopping area. Non-retail uses, generally or that of a particular non-retail use, should not be allowed to dominate primary areas so as to undermine the retail function;

(ii) the provision of a shop window display or other frontage complementary to the character of the shopping area;

(iii) the effect of the proposed use, either individually or cumulatively, on the environment, the amenity of adjoining occupiers and access and highway considerations particularly relating to on street parking;

(iv) that access is provided to and within the building for people with disabilities and for shoppers with prams or pushchairs.

S.1.3 Non-Retail Uses In Secondary Frontages

In secondary shopping frontages in main shopping areas (as defined on the Proposals Map and in Tables S.1 and S.2) change from retail to non-retail use will be acceptable where the proposed use would not harm the character, vitality and viability of the centre. The acceptability of further non-retail uses will not be made solely by reference to the number of outlets, proportions of floorspace or lengths of frontages but will take into account the following criteria:

(i) the likely impact of the proposed use on the variety and activity in the shopping parade. Non-retail uses generally, or that of a particular non-retail use, should not be allowed to dominate the secondary area so as to undermine the retail function;

(ii) the provision of a shop window display or other frontage complementary to the character of the shopping centre;

(iii) the effect of the proposed use, either individually or cumulatively, on the environment, the amenity of adjoining occupiers and on access and highway considerations, particularly relating to on street parking;

(iv) that access is provided to and within the unit for people with impaired mobility and for shoppers with prams and pushchairs.

S.1.4 Non Retail Uses In Locations Outside Primary And Secondary Frontages Within The Main Shopping Areas

The Council will normally allow the change of use from retail to non-retail use outside primary and secondary frontages having regard to the following criteria:

(i) the proposed use would not adversely affect the remaining retail function of the parade;

(ii) that the proposed use would not, either individually or cumulatively, have an adverse effect on the environment, residential amenity and on access and highway considerations particularly relating to on street parking;

(iii) that there is an appropriate shop window display or frontage complementary to the character of the area;

(iv) that there is satisfactory provision to and within the proposed use for people with disabilities and others with mobility problems including shoppers with pushchairs.

S.2.1 Non-Retail Uses In Minor Neighbourhood Centres And Key Local Parades

The Council will endeavour to safeguard and strengthen the role of neighbourhood centres and key local parades by retaining shops and services of an appropriate type, number and quality which provide for the day to day needs of local residents. Non-retail uses which provide diversity and serve a local need or community service may be considered acceptable in some instances taking account of the following criteria:

(i) the likely impact of the loss of the retail use and of the proposed use on the variety of facilities available and the attractiveness of the parade on-retail uses, generally or that of a particular use, should not be allowed to dominate the parade so as to undermine its retail function;

(ii) the provision of a shop window display or other frontage complementary to the character of the shopping centre;

(iii) the effect of the proposed use on the environment, the amenity of adjoining occupiers and on access and highway considerations, particularly relating to on street parking;

(iv) that access is provided to and within the unit for people with impaired mobility and for shoppers with prams and pushchairs.

S.2.2. Non-Retail Uses In Other Shopping Areas

Changes of use from retail to non-retail use in those shops and parades which are not included in main shopping areas, minor neighbourhood centres and key local parades (See Tables S.1 and S.2) will be considered with regard to the following criteria:

(i) the impact of the change of use upon local shopping provision which meet day to day needs. In particular the Council will seek to safeguard against the loss of an essential local shop i.e. post office, chemist, newsagent/confectioner, grocer/mini market, greengrocer, baker or butcher;

(ii) the availability of alternative shopping facilities within 400m;

(iii) the vacancy rate of shop units within the parade;

(iv) the proposed use would not, either individually or cumulatively, have an adverse effect on the environment, residential amenity and on access and highway considerations particularly relating to on street parking;

(v) the type, character and number of units.

S.2.3 Implementation Of Non-Retail Use Permissions

In exceptional circumstances conditions may be attached to planning permissions for non-retail uses requiring the development to begin within a shorter period than the normal five year implementation period.

S.3.1 New Retail Development

In considering applications for new retail development the Council will adopt a sequential test approach whereby the first preference should be to locate within existing town centres. Where viable, town centre sites or buildings suitable for conversion are not available, edge of centre sites, followed by major neighbourhood and minor neighbourhood centres should be considered next. Only following the consideration of these locations should out-of-centre locations be considered and only then, where they are or can be made readily accessible by a choice of means of transport. Where retail development is proposed the Council will take into account the following criteria:

(i) the effect, either individually or cumulatively, on the vitality and viability of existing town centres as a whole, including the effect on future private sector investment needed to safeguard the vitality and viability in each centre and the extent to which any proposal would put at risk the strategy for each centre (See Policies IMP.2.1 to IMP.2.4);

(ii) the quantitative and qualitative need for the new development in locations outside of the Borough's town centres, major neighbourhood centres and minor neighbourhood centres;

(iii) the shopping characteristics of the new development e.g. the size of units proposed, type of goods to be sold, etc and the provision of existing facilities in all nearby centres;

(iv) the impact of the proposal in terms of trip generation and adequacy of parking and cycling provision (See Policies T.1.2, T.1.3, T.1.4 and Appendix 3);

(v) the current or designated use of the site in question. Proposals will not be acceptable in the Green Belt or Metropolitan Open Land;

(vi) the accessibility of the site by a choice of transport mode taking into account its proximity to other travel generating activities; the availability of public transport and community transport; the ease of access to the site by walking and cycling; and the potential for linked trips;

(vii) accessibility for people with impaired mobility such as carers with pushchairs and people with disabilities;

(viii) the design and external appearance of the proposal, hard and soft landscaping treatment and the provision of recycling facilities;

(x) the effect on the amenity of adjoining residents or the immediate residential locality and the environment generally.

S.3.2 Major Retail Development In Neighbouring Boroughs

The Council will resist proposals for major new shopping development in neighbouring boroughs, either in town centres or out of town which would seriously weaken the viability and vitality of centres within the Borough.

S.4.1 Environmental Improvements To Shopping Areas

The Council will encourage the improvement of the environment of shopping centres in the Borough through such means as:

(i) good design in new developments, refurbishments and conversions;

(ii) landscaping, street furniture and public art (See Policies ENV-B.1.5 and ENV-B.1.6);

(iii) improved traffic management, cycle parking and servicing;

(iv) improvements to public transport waiting facilities;

(v) improvements to pavements and accessibility.

The Council will also seek more fundamental improvements at Hounslow, Chiswick, Feltham and Brentford town centres in order to actively promote the regeneration and enhancement of these areas (See also Policies IMP.2.1 to IMP.2.4 and the Strategies for each centre, Town Centre Action Plans SPG).

S.4.2 Shop Front Design

The Council will expect a high standard of design in proposals for all new shop fronts. Particular regard should be given to the following:

(i) the shop front should respect the building's elevation and architectural details of merit, particularly period shopfronts on listed buildings and in conservation areas, and should be retained (see Shopfront Design Guidelines);

(ii) the design should take into account adjacent shop fronts where they make a positive contribution to the street scene;

(iii) where a shop front involves two or more facades the shop front should correspondingly be divided with separate fascias and columns used to divide the separate units;

(iv) whenever possible, improvements to the shop front should be accompanied by an improvement to the total facade;

(v) the shop fascia should not form more than 15-20% of the overall height of the shop front and should not extend to first floor windows or sills;

(vi) entrances should be fully accessible to people with mobility difficulties; such as people with disabilities, older people and carers with young children in pushchairs;

(vii) solid roller shutters detract from the overall appearance of a building and will not normally be acceptable.

Special attention will be given to shops within conservation areas, regeneration areas and other main shopping areas.

S.4.3 Advertisements

In dealing with applications for advertisements to retail premises or within a shopping area the Council will have regard to the criteria set out in Policy ENV-B.1.4.

S.4.4 Access To Shopping Facilities

The Council will ensure that the needs of people with impaired mobility e.g. people with disabilities, older people and carers with young children are taken into account when considering all applications for retail or non-retail development. Applications should have regard to the Council's own guidelines "Think Access", which give advice on external and internal design matters.

S.4.5 Servicing Arrangements

Where inappropriate servicing exists, the Council will seek to improve facilities for access and servicing. Extensions to premises will be resisted if this results in an unacceptable loss of existing or potential access, parking and service facilities to the unit itself or any other separate unit on the site.

S.4.6 Customer Facilities

The Council will expect major new retail development to provide improved customer facilities e.g. accessible toilets, baby-changing areas, baby feeding facilities, play areas, creches, cycle facilities and parking spaces for the vehicles of people with disabilities. Proposals should have regard to the Council's "Think Access" Guidelines (See Policy IMP.6.1).

S.4.7 Access To Upper Floors

New shop fronts, alterations and extensions should maintain or improve separate access to upper floors, preferably to the street, in connection with the provision of suitable residential accommodation (See Policy H.3.3 Use of Upper Floors Above Shops).

APPENDIX 4:

TRADING INFLUENCE OF COMPETING CENTRES

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

COMPARISON GOODS ALLOCATION 2006
% MARKET SHARE

RETAIL LOCATION	ZONE 1 %	ZONE 2 %	ZONE 3 %	ZONE 4 %	ZONE 5 %	ZONE 6 %	ZONE 7 %	ZONE 8 %	ZONE 9 %	ZONE 10 %	ZONE 11 %	ZONE 12 %	ZONE 13 %	ZONE 14 %	ZONE 15 %	ZONE 16 %	ZONE 17 %	ZONE 18 %	ZONE 19 %	ZONE 20 %	ZONE 21 %	ZONE 22 %	ZONE 23 %	ZONE 24 %	ZONE 25 %	ZONE 26 %	ZONE 27 %	ZONE 28 %	ZONE 29 %	ZONE 30 %
Kingston	4.0%	0.2%	0.4%	0.3%	1.5%	2.5%	0.0%	0.0%	0.8%	2.8%	13.5%	6.1%	17.2%	15.6%	14.5%	5.6%	7.5%	15.4%	24.9%	42.4%	49.5%	13.1%	2.5%	2.3%	0.3%	0.0%	0.9%	0.3%	0.5%	7.1%
West End	8.9%	18.3%	18.8%	9.4%	10.4%	7.8%	3.4%	0.5%	3.3%	2.3%	0.9%	0.7%	0.3%	0.9%	3.6%	1.8%	15.1%	7.3%	2.1%	0.2%	0.5%	0.0%	0.0%	1.9%	1.7%	2.5%	6.7%	26.9%	10.6%	7.6%
Uxbridge	0.0%	0.0%	0.5%	0.3%	1.2%	0.6%	1.2%	10.7%	10.6%	5.6%	1.2%	0.1%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.2%	32.0%	10.0%	0.0%	0.0%	0.0%	0.0%
Staines	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.3%	3.9%	19.4%	14.8%	0.9%	1.5%	0.0%	0.0%	0.2%	0.0%	0.0%	3.8%	51.7%	64.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harrow	0.0%	0.0%	0.6%	0.0%	0.0%	0.7%	19.8%	19.3%	3.1%	0.9%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.7%	1.5%	30.2%	9.4%	2.0%	0.0%	0.0%
Richmond	0.0%	0.5%	0.0%	0.6%	0.5%	1.3%	0.0%	0.0%	0.6%	0.0%	2.0%	0.0%	0.6%	1.9%	8.8%	5.0%	3.8%	14.5%	47.5%	17.6%	4.1%	0.0%	0.0%	0.7%	0.0%	0.2%	0.0%	0.3%	0.3%	0.0%
Kensington	6.1%	11.5%	3.7%	1.2%	0.0%	0.3%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	3.1%	0.2%	0.2%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	15.2%	24.5%	3.3%
Brent Cross	0.3%	1.0%	2.5%	6.7%	3.2%	9.6%	3.9%	1.1%	1.2%	1.0%	0.0%	0.0%	0.0%	0.3%	0.3%	0.0%	2.8%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	21.5%	6.1%	0.0%	0.0%
Chelsea	7.0%	2.3%	0.2%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	1.7%	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	16.8%	13.3%
Ealing	0.0%	0.3%	3.7%	39.7%	52.7%	46.1%	21.4%	9.5%	18.6%	16.5%	0.9%	0.0%	0.0%	1.5%	1.5%	18.3%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	1.3%	0.4%	3.8%	0.3%	0.2%	0.0%
Southall	0.0%	0.0%	0.4%	0.3%	0.2%	0.6%	0.1%	1.2%	6.6%	5.5%	1.1%	3.9%	0.0%	0.9%	0.8%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	2.5%	0.0%	0.2%	0.0%	0.2%	0.0%
Hammersmith	5.5%	27.1%	22.0%	2.6%	0.5%	0.6%	0.6%	0.0%	0.0%	0.0%	1.0%	0.6%	0.0%	0.0%	0.0%	1.3%	6.9%	4.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	0.0%	4.7%	0.3%	0.0%
Fulham	20.7%	2.6%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.1%	0.0%	0.0%	0.6%	0.4%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.7%	2.3%	1.0%
Shpeherds Bush	0.3%	3.3%	9.2%	1.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	6.4%	0.0%	0.0%
Hounslow	0.2%	0.3%	1.1%	0.6%	0.0%	0.7%	0.0%	1.9%	3.3%	21.3%	41.1%	21.0%	16.8%	40.0%	25.5%	18.9%	2.3%	0.2%	1.7%	5.1%	2.1%	0.5%	1.5%	3.2%	0.5%	0.0%	0.3%	0.7%	0.0%	0.0%
Chsiwick	0.7%	3.6%	5.8%	5.2%	1.4%	0.3%	0.0%	0.0%	0.2%	0.0%	0.7%	0.0%	0.2%	0.7%	0.8%	3.4%	25.2%	10.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%
SUB-TOTAL	**53.8%**	**70.9%**	**70.1%**	**68.0%**	**72.7%**	**71.0%**	**51.2%**	**44.5%**	**48.2%**	**56.5%**	**66.8%**	**52.0%**	**49.9%**	**62.8%**	**58.2%**	**55.2%**	**70.1%**	**57.2%**	**77.2%**	**66.0%**	**61.0%**	**65.4%**	**68.8%**	**42.1%**	**39.8%**	**46.5%**	**44.2%**	**63.9%**	**55.7%**	**32.2%**
Other	46.2%	29.1%	29.9%	32.0%	27.3%	29.0%	48.8%	55.5%	51.8%	43.5%	33.2%	48.0%	50.1%	37.2%	41.8%	44.8%	29.9%	42.8%	22.8%	34.0%	39.0%	34.6%	31.2%	57.9%	60.2%	53.5%	55.8%	36.1%	44.3%	67.8%
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

COMPARISON GOODS ALLOCATION 2006
SPEND (£)

RETAIL LOCATION	ZONE 1 (£000)	ZONE 2 (£000)	ZONE 3 (£000)	ZONE 4 (£000)	ZONE 5 (£000)	ZONE 6 (£000)	ZONE 7 (£000)	ZONE 8 (£000)	ZONE 9 (£000)	ZONE 10 (£000)	ZONE 11 (£000)	ZONE 12 (£000)	ZONE 13 (£000)	ZONE 14 (£000)	ZONE 15 (£000)	ZONE 16 (£000)	ZONE 17 (£000)	ZONE 18 (£000)	ZONE 19 (£000)	ZONE 20 (£000)	ZONE 21 (£000)	ZONE 22 (£000)	ZONE 23 (£000)	ZONE 24 (£000)	ZONE 25 (£000)	ZONE 26 (£000)	ZONE 27 (£000)	ZONE 28 (£000)	ZONE 29 (£000)	ZONE 30 (£000)	TOTAL (£000)
Kingston	9,916	588	690	509	3,929	3,852	0	0	535	2,943	11,104	3,686	14,580	16,173	14,936	3,088	14,570	33,723	42,212	94,359	52,385	14,312	755	1,307	436	0	2,354	1,502	1,919	31,598	**377,960**
West End	22,104	45,700	30,158	15,164	26,588	12,222	2,687	517	2,247	2,384	749	396	267	958	3,680	1,020	29,463	15,891	3,642	543	571	0	0	1,080	2,304	4,662	18,082	140,029	44,749	33,698	**461,554**
Uxbridge	0	0	784	509	3,146	947	927	10,451	7,196	5,768	997	77	0	0	973	0	0	0	0	0	0	0	0	16,793	44,347	18,542	0	0	0	0	**111,455**
Staines	0	0	0	0	0	0	241	0	0	293	3,175	11,724	12,576	899	1,500	0	0	502	0	0	3,994	56,302	19,825	0	0	0	0	0	0	0	**111,033**
Harrow	0	0	975	0	0	1,064	15,603	18,859	2,134	976	210	0	0	0	0	0	0	0	0	0	395	0	0	379	2,019	55,840	25,649	10,204	0	0	**134,308**
Richmond	0	1,176	0	1,006	1,335	2,118	0	0	429	0	1,638	0	535	1,958	9,110	2,799	7,390	31,603	80,447	39,042	4,293	0	0	388	0	287	0	1,402	1,215	0	**188,171**
Kensington	15,214	28,679	5,988	1,993	0	438	325	0	0	0	0	0	0	0	0	0	5,548	6,839	332	398	721	0	0	0	0	0	2,310	79,310	103,212	14,698	**266,005**
Brent Cross	727	2,392	4,084	10,846	8,168	15,040	3,092	1,119	798	997	0	0	0	300	264	0	5,393	0	479	0	0	0	0	0	0	5,281	58,249	31,683	0	0	**148,912**
Chelsea	17,444	5,629	268	0	2,614	0	0	0	0	0	0	0	0	0	0	510	0	3,638	479	479	0	0	0	0	0	0	0	1,630	70,789	59,300	**162,780**
Ealing	0	714	5,973	64,318	134,102	72,282	16,847	9,268	12,645	17,111	765	0	0	1,578	1,595	10,179	4,767	0	0	0	0	0	0	654	1,834	827	10,207	1,402	968	0	**368,036**
Southall	0	0	671	528	548	991	66	1,185	4,500	5,719	944	2,365	0	964	791	0	394	0	0	0	0	0	0	1,027	3,489	0	585	0	964	0	**25,731**
Hammersmith	13,758	67,444	35,332	4,213	1,271	947	489	0	0	0	798	394	0	0	0	701	13,486	8,634	0	0	0	92	0	0	0	452	0	24,488	1,215	0	**173,713**
Fulham	51,358	6,582	1,782	0	0	0	0	0	0	0	0	137	0	80	0	0	1,239	900	0	468	0	0	0	0	0	0	871	3,832	9,725	4,418	**81,395**
Shpeherds Bush	783	8,128	14,818	1,672	0	0	0	153	0	303	189	0	0	0	0	0	669	630	0	0	0	0	0	0	0	0	855	33,400	0	0	**61,601**
Hounslow	568	714	1,758	901	0	1,041	0	1,885	2,243	21,985	33,761	12,743	14,235	41,569	26,297	10,509	4,424	530	2,959	11,414	2,181	549	469	1,804	734	0	855	3,571	0	0	**199,697**
Chsiwick	1,645	8,885	9,357	8,359	3,443	438	0	0	107	0	555	0	207	769	816	1,883	49,200	22,178	166	0	0	0	0	0	0	287	0	0	0	0	**108,297**
SUB-TOTAL	**133,517**	**176,633**	**112,637**	**110,021**	**185,144**	**111,379**	**40,278**	**43,438**	**32,832**	**58,479**	**54,885**	**31,523**	**42,400**	**65,249**	**59,960**	**30,690**	**136,543**	**125,068**	**130,715**	**146,703**	**64,539**	**71,255**	**21,049**	**23,432**	**55,162**	**86,180**	**120,015**	**332,454**	**234,756**	**143,712**	**2,980,647**
Other	114,720	72,519	48,001	51,790	69,443	45,539	38,352	54,166	35,245	44,970	27,255	29,056	42,528	38,711	43,067	24,872	58,329	93,453	38,666	75,724	41,235	37,621	9,557	32,229	83,309	98,989	151,483	188,124	186,436	302,371	**2,177,760**
TOTAL	**248,237**	**249,152**	**160,638**	**161,811**	**254,587**	**156,917**	**78,630**	**97,604**	**68,076**	**103,449**	**82,140**	**60,579**	**84,928**	**103,959**	**103,028**	**55,562**	**194,872**	**218,521**	**169,381**	**222,428**	**105,774**	**108,875**	**30,606**	**55,661**	**138,471**	**185,169**	**271,498**	**520,577**	**421,192**	**446,083**	**5,158,407**

London Borough of Ealing: Sub Regional Context
Comparison Goods Trade Leakage from Zones 4-10

Centre	Comparison goods trade draw from Zones 4-10 (£000)	% of Zone 4-10 Available Comparison Goods Expenditure
West End	61,810	6.7
Brent Cross	40,060	4.3
Harrow	38,637	4.2
Uxbridge	28,943	3.1
Hounslow	28,055	3.0
Chiswick	12,346	1.3
Kingston	11,768	1.3
Hammersmith	6,920	0.8
Richmond	4,888	0.5
Kensington	2,756	0.3
Chelsea	2,614	0.3
Shepherds Bush	2,128	0.2
Staines	534	0.1
Fulham	0	0.0

London Borough of Hammersmith & Fulham
Comparison Goods Trade Leakage from Zones 1-3

Centre	Comparison goods trade draw from Zones 1-3 (£000)	% of Zone 1-3 Available Comparison Goods Expenditure
West End	97,962	14.9
Kensington	49,880	7.6
Chelsea	23,341	3.5
Chiswick	19,888	3.0
Kingston	11,194	1.7
Brent Cross	7,202	1.1
Ealing	6,687	1.0
Hounslow	3,041	0.5
Richmond	1,176	0.2
Harrow	975	0.1
Uxbridge	784	0.1
Southall	671	0.1
Staines	0	0.0

London Borough of Hounslow
Comparison Goods Trade Leakage from Zones 11-17

Centre	Comparison goods trade draw from Zones 11-17 (£000)	% of Zone 11-17 Available Comparison Goods Expenditure
Kingston	78,137	11.4
West End	36,533	5.3
Staines	29,875	4.4
Richmond	23,430	3.4
Ealing	18,884	2.8
Hammersmith	15,378	2.2
Brent Cross	5,957	0.9
Kensington	5,548	0.8
Southall	5,458	0.8
Uxbridge	2,046	0.3
Fulham	1,457	0.2
Shepherds Bush	858	0.1
Chelsea	510	0.1
Harrow	210	0.0

APPENDIX 5:

COMPETING CENTRES: KEY INDICATORS

Competing Centres: Key Indicators

4.1 Javelin Rank		
Centre	**Rank (2006)**	**Change in Rank position 2005**
Kingston	16	↑
West End	11	↓
Uxbridge	85	↑
Staines	120	↓
Harrow	120	↓
Richmond	116	↑
Kensington High Street	113	↑
Brent Cross	146	↑
Chelsea/ Kings Rd	107	↑
Ealing	100	↑
Hanwell	1,818	-
Southall	1,528	↓
Acton	618	↓
Greenford	1,034	↓
Hammersmith	149	↓
Fulham	764	↑
Shepherds Bush	483	↑
Hounslow	165	↓
Chiswick	263	↑
Feltham	882	↓
Brentford	1,946	↓
Source: Venue Score Javelin 2006		

4.2 Retail Floorspace	
Centre	***sq.m gross***
Kingston	130,000
West End	482,000
Uxbridge	84,000
Staines	68,000
Harrow	86,000
Richmond	47,000
Kensington High Street	N/a
Brent Cross	77,000
Chelsea/ Kings Rd	N/a
Ealing	116,228
Hanwell	18,757
Southall	55,846
Acton	29,510
Greenford	25,260
Hammersmith	59,080
Fulham	40,250
Shepherds Bush	40,090
Hounslow	76,868
Chiswick	57,566
Feltham	36,897
Brentford	13,440
Source: Promis/ Experian/ GVA Grimley	

4.3 Comparison Goods Trade Draw %	
Centre	%
Kingston	7.3
West End	8.9
Uxbridge	2.2
Staines	2.2
Harrow	2.6
Richmond	3.6
Kensington High Street	5.2
Brent Cross	2.9
Chelsea/ Kings Rd	3.2
Ealing	7.1
Hanwell	0.09
Southall	0.5
Acton	0.5
Greenford	0.4
Hammersmith	
Fulham	1.6
Shepherds Bush	1.2
Hounslow	3.9
Chiswick	2.1
Feltham	0.5
Brentford	0.5
Source: GVA Grimley Modelling	

4.4 Comparison Goods Trade Draw £m	
Centre	**£m**
Kingston	£377.9
West End	£461.5
Uxbridge	£111.4
Staines	£111.0
Harrow	£134.3
Richmond	£188.1
Kensington High Street	£266.0
Brent Cross	£148.9
Chelsea/ Kings Rd	£162.7
Ealing	£368.0
Hanwell	£4.7
Southall	£25.7
Acton	£27.8
Greenford	£22.0
Hammersmith	£173.7
Fulham	£81.3
Shepherds Bush	£61.6
Hounslow	£199.6
Chiswick	£108.6
Feltham	£25.1
Brentford	£27.9
Source: GVA Grimley Modelling	

4.5 Comparison of Prime Retail Yields (%)		
Centre	**April 03**	**Jan 06**
Kingston	4.25	4.25
West End	5.25	5
Uxbridge	6	6
Staines	5.25	5
Harrow	6.25	6
Richmond	4.5	5
Kensington High Street	6.25	6.25
Brent Cross	5	4.5
Chelsea/ Kings Rd	5.75	5.5
Ealing	6.25 – 7.5	6 - 7
Hanwell	-	-
Southall	9	9.25
Acton	6.25	6.5
Greenford	10	9.5
Hammersmith	9.25	9
Fulham	9	9
Shepherds Bush	-	-
Hounslow	9	9.5
Chiswick	7	7
Feltham	10	10
Brentford	-	-
Source: Valuation Office Agency – Property Market Report		

4.6 2005 Rents	
Centre	**£ per sq.m**
Kingston	3,174
West End	4,035 – 5,380
Uxbridge	2,152
Staines	1,345
Harrow	1,399
Richmond	2,206
Kensington High Street	3,282
Brent Cross	4,573
Chelsea/ Kings Rd	3,605
Ealing	1,991
Hanwell	-
Southall	968
Acton	646
Greenford	-
Hammersmith	1,829
Fulham	1,506
Shepherds Bush	-
Hounslow	1,076
Chiswick	1,453
Feltham	-
Brentford	-
Source: Colliers In Town Retail Rents 2005	

4.7 Retailer Demand April 2006	
Centre	**No**
Kingston	177
West End	189
Uxbridge	97
Staines	85
Harrow	90
Richmond	141
Kensington High Street	124
Brent Cross	62
Chelsea/ Kings Rd	82
Ealing	48
Hanwell	2
Southall	32
Acton	22
Greenford	28
Hammersmith	49
Fulham	50
Shepherds Bush	26
Hounslow	45
Chiswick	49
Feltham	26
Brentford	30
Source: Focus	

APPENDIX 6:

COMPETING CENTRES: RETAIL AND LEISURE REPRESENTATION

Competing Centres: Retailer Representation

Centre	*Shopping Centres*	*Other Key Anchors*	*Department Stores*
Kingston	• The Bentall Centre. Opened 1992. Anchored by Bentalls Department Store. Other retailers include New Look, Zara, Muji and The Pier. • Eden Walk, Opened in 1968 and extended in 1979. Anchored by Bhs, Marks & Spencer, Habitat, Heals , Boots.	Hennes, French Connection, Gap, Next, Zara, Monsoon, Hobbs, Primark, Jigsaw, Reiss.	Bentalls John Lewis
West End (Bond St/ Oxford St)	• West One. Opened above Bond St London Underground station in 1981. Retailers include Burton, Dorothy Perkins, Boots, Marks & Spencer Simply Food, Superdrug. • The Plaza. Retailers include WH Smiths, Uniqlo, Oasis, Sports World, Clinton Cards.	Top Shop, Nike Town, Borders, Urban Outfitters, H&M, Gap, Benetton, Marks & Spencer, Virgin Megastore, Clarks.	Debenhams House of Fraser John Lewis Selfridges
Uxbridge	• The Chimes. Opened in 2001. Anchored by Debenhams. Other retailers include Bhs, Boots, H&M, New Look, Next and Gap. • The Pavillion. Opened in 1972. Retailers include Marks & Spencer, TK Maxx, Tesco Metro and Wilkinson.	Key stores are all in the two shopping centres.	Debenhams
Staines	• Elmsleigh Centre. Opened in 1979. Retailers include Bhs, Matalan, Marks & Spencer, Next. • Two Rivers. Opened in 1998. Retailers include Boots, Gaps and JJB Sports.	Woolworths, Waitrose.	Debenhams
Harrow	• St Annes. Opened in 1980. Key tenants include Marks & Spencer, Nhs, and River Island. • St Georges. Opened in 1996. Key retailers include H&M, Faith, Monsoon and La Senza.	New Look, Sports Soccer, Next, Dorothy Perkins.	Debenhams
Richmond	• No Shopping centre.	Marks & Spencer, Gap, Hobbs, Next, Monsoon, Whistles, Jigsaw, Joseph, Ted Baker, LK Bennett.	Dickens & Jones
Kensington High Street	• Kensington Arcade. Opened in 1908 and refurbished in 1989. Retailers include Boots, Kew, Tie Rack and Knickerbox.	Top Shop, Urban Outfitters, Marks & Spencer, Gap, Next, Zara, Hobbs, Jigsaw.	Barkers
Brent Cross	• Brent Cross is a shopping centre which opened in 1976 which has a major refurbishment and extension in the mid 1990's. There are 109 retailers including two department stores, Marks & Spencer, Waitrose, Monsoon, Gap, Kookai, La Senza, Clarks, Fat Face, French Connection and Vurgin Megastore.	-	Fenwicks John Lewis
Chelsea/ Kings Rd	• Kings Walk Mall. Opened in 1988. Much of the interior space is occupied by Virgin Megastore, Easy Internet Café and JD Sports. • Duke of Yorks Square. Opened in 2003. Retailers include Ted Baker, Jigsaw, Space NK, Agnes b and Zara.	Boss, Chloe, French Connection, Gap, Habitat, Hobbs, Tiffany & Co.	Peter Jones

Source: Promis/EGI/GVA Grimley

APPENDIX 7:

LEISURE TRAVEL PATTERNS

Leisure Patterns Across the Survey Area

Where do you go most often to visit the cinema?	%
Feltham Cineworld	16.4
Park Royal Vue	9.9
Ricmond Odeon	9.7
Uxbridge Odeon	6.0
Shepherds Bush West 12 Vue	5.2
Ealing Cineworld/ UGC	4.9
Fulham Broadway Vue	4.8
Staines Vue	4.6
Harrow Vue	4.1
Hammersmith UGC	3.7
Kensington	2.6
Kingston	2.6

Where do you go most often to go ten pin bowling?	%
Royale Leisure Park Acton	29.9
Feltham	28.8
Heathrow Bowl	10.8
Kingston	6.1
Queensway	2.2

Where do you go most often to visit the gym/ health & fitness club?	%
Acton	8.4
Fulham	7.6
Ealing	5.4
Richmond	4.5
Central London	4.1
Chiswick	4.1
Greenford	4.0
Kensington	3.5
Twickenham	2.8
Staines	2.8
Hammersmith	2.6
Hanwell	2.6
Feltham	2.5
Southall	2.4

What town centre do you visit most often for pubs/ vlubs?	%
Ealing	9.5
Central London/ West End	8.6
Richmond	8.0
Chiswick	4.4
Hammersmith	3.3
Hounslow	2.8
Fulham	2.8
Twickenham	2.6
Staines	2.2

What town centre do you visit most often for restaurants?	%
Central London/ West End	11.6
Ealing	9.0
Chiswick	6.3
Richmond	6.3
Fulham	2.8
Twickenham	2.6
Hounslow	2.6
Harrow	2.2

Source: Household Telephone Survey

APPENDIX 8:

BENCHMARKING OF MAJOR STUDY CENTRES

WEST LONDON STUDY 2006
BENCHMARKING OF CENTRES

TABLE 1

	Borough	Centre	Rank by Catchment Population	Rank Score
1	Hounslow	Hounslow	857,459	12
2	Ealing	Ealing	707,978	11
3	Hammersmith and Fulham	Hammersmith	597,228	10
4	Hounslow	Brentford	562,675	9
5	Ealing	Acton	503,701	8
6	Hounslow	Chiswick	502,180	7
7	Hammersmith and Fulham	Fulham	387,983	6
8	Ealing	Southall	372,622	5
9	Ealing	Greenford	318,589	4
10	Hammersmith and Fulham	Shepherd's Bush	289,864	3
11	Hounslow	Feltham	274,561	2
12	Ealing	Hanwell	59,834	1

NB - Population where centre has a 1% plus market share in zones 1-30

WEST LONDON STUDY 2006
BENCHMARKING OF CENTRES

TABLE 2

	Borough	Centre	Rank by Shopping Population	Rank Score
1	Ealing	Ealing	107,694	12
2	Hounslow	Hounslow	74,810	11
3	Hammersmith and Fulham	Hammersmith	45,741	10
4	Hammersmith and Fulham	Fulham	20,119	9
5	Hounslow	Chiswick	19,955	8
6	Hammersmith and Fulham	Shepherd's Bush	14,675	7
7	Ealing	Southall	9,486	6
8	Hounslow	Feltham	9,462	5
9	Ealing	Greenford	8,320	4
10	Hounslow	Brentford	7,643	3
11	Ealing	Acton	7,371	2
12	Ealing	Hanwell	1,032	1

WEST LONDON STUDY 2006
BENCHMARKING OF CENTRES

TABLE 3

	Borough	Centre	Rank by Shopping Population as % of Catchment Population	Rank Score
1	Ealing	Ealing	12.6	12
2	Ealing	Hanwell	10.6	11
3	Ealing	Southall	7.7	10
4	Ealing	Greenford	4.0	9
5	Ealing	Acton	3.6	8
6	Hammersmith and Fulham	Hammersmith	2.9	7
7	Hounslow	Feltham	2.7	6
8	Hounslow	Chiswick	2.6	5
9	Hounslow	Hounslow	2.6	5
10	Hammersmith and Fulham	Shepherd's Bush	2.5	3
11	Hammersmith and Fulham	Fulham	2.4	2
12	Hounslow	Brentford	1.7	1

WEST LONDON STUDY 2006
BENCHMARKING OF CENTRES

TABLE 4

	Borough	Centre	Rank by Comparison Goods Turnover (£000)	Rank Score
1	Ealing	Ealing	434,517	12
2	Hammersmith and Fulham	Hammersmith	227,075	11
3	Hounslow	Hounslow	201,706	10
4	Hounslow	Chiswick	114,485	9
5	Hammersmith and Fulham	Fulham	98,303	8
6	Hammersmith and Fulham	Shepherd's Bush	85,915	7
7	Hounslow	Brentford	30,820	6
8	Ealing	Acton	30,057	5
9	Ealing	Southall	27,269	4
10	Hounslow	Feltham	27,090	3
11	Ealing	Greenford	22,558	2
12	Ealing	Hanwell	5,471	1

WEST LONDON STUDY 2006
BENCHMARKING OF CENTRES

TABLE 5

	Borough	Centre	Rank by No. of Retailer Requirements	Rank Score
1	Hammersmith and Fulham	Fulham	50	12
2	Hammersmith and Fulham	Hammersmith	49	11
3	Hounslow	Chiswick	49	11
4	Ealing	Ealing	48	9
5	Hounslow	Hounslow	45	8
6	Ealing	Southall	32	7
7	Hounslow	Brentford	30	6
8	Ealing	Greenford	28	5
9	Hammersmith and Fulham	Shepherd's Bush	26	4
10	Hounslow	Feltham	26	4
11	Ealing	Acton	22	2
12	Ealing	Hanwell	2	1

WEST LONDON STUDY 2006
BENCHMARKING OF CENTRES

TABLE 6

	Borough	Centre	Rank by Comparison Goods Floorspace Sq m net	Rank Score
1	Ealing	Ealing	38,464	12
2	Hounslow	Hounslow	23,718	11
3	Ealing	Southall	16,656	10
4	Hammersmith and Fulham	Hammersmith	15,464	9
5	Hounslow	Chiswick	13,010	8
6	Hounslow	Feltham	9,814	7
7	Hammersmith and Fulham	Fulham	8,769	6
8	Hammersmith and Fulham	Shepherd's Bush	7,865	5
9	Ealing	Acton	6,884	4
10	Ealing	Hanwell	6,588	3
11	Ealing	Greenford	5,737	2
12	Hounslow	Brentford	2,122	1

WEST LONDON STUDY 2006
BENCHMARKING OF CENTRES

TABLE 7

	Borough	Centre	Rank by Convenience Goods Floorspace Sq m net	Rank Score
1	Ealing	Ealing	9,708	12
2	Hounslow	Feltham	9,567	11
3	Ealing	Southall	7,407	10
4	Hounslow	Chiswick	7,365	9
5	Ealing	Acton	6,098	8
6	Hammersmith and Fulham	Fulham	5,642	7
7	Hammersmith and Fulham	Shepherd's Bush	4,654	6
8	Hammersmith and Fulham	Hammersmith	3,744	5
9	Ealing	Greenford	3,442	4
10	Hounslow	Brentford	2,808	3
11	Hounslow	Hounslow	2,089	2
12	Ealing	Hanwell	1,637	1

WEST LONDON STUDY 2006
BENCHMARKING OF CENTRES

TABLE 8

	Borough	Centre	Rank by Total Floorspace Sq m net	Rank Score
1	Ealing	Ealing	48,172	12
2	Hounslow	Hounslow	28,372	11
3	Hammersmith and Fulham	Hammersmith	20,098	10
4	Hounslow	Chiswick	22,829	9
5	Hounslow	Feltham	19,381	8
6	Ealing	Southall	20,417	7
7	Hammersmith and Fulham	Fulham	14,411	6
8	Hammersmith and Fulham	Shepherd's Bush	11,609	5
9	Ealing	Acton	12,982	4
10	Ealing	Greenford	8,545	3
11	Ealing	Hanwell	8,225	2
12	Hounslow	Brentford	4,211	1

WEST LONDON STUDY 2006
BENCHMARKING OF CENTRES

TABLE 9

	Borough	Centre	Rank Score
1	Ealing	Ealing	92
2	Hammersmith and Fulham	Hammersmith	73
3	Hounslow	Hounslow	70
4	Hounslow	Chiswick	66
5	Ealing	Southall	59
6	Hammersmith and Fulham	Fulham	56
7	Hounslow	Feltham	46
8	Ealing	Acton	41
9	Hammersmith and Fulham	Shepherd's Bush	40
10	Ealing	Greenford	33
11	Hounslow	Brentford	30
12	Ealing	Hanwell	21

APPENDIX 9:

BENCHMARKING OF SMALLER STUDY CENTRES

Smaller Centre Benchmark Ranking

By Total Rank

Borough	Centre	Total Rank
Ealing	Northfields	176
H&F	King Street West	169
Ealing	South Ealing	166
H&F	Fulham Road	158
H&F	Uxbridge Road West	156
H&F	North End Rd/W.Kensington	155
Ealing/H&F	East Acton	151
Hounslow	Hounslow West	147
H&F	Parson's Green	146
Ealing	Pitshanger	135
H&F	Uxbridge Road East	131
H&F	Fulham High Street	127
H&F	Askew Road	127
H&F	Shepherd's Bush Road	125
Hounslow	Bedfont	123
Hounslow	Isleworth	111
H&F	Munster Road	102
Ealing	Northolt	95
H&F	Fulham Palace Road	92
H&F	Greyhound Road	91
Ealing	Perivale	90
H&F	Goldhawk Road	90
Ealing	West Way Cross	82
Hounslow	Cranford	80
Hounslow	Heston	80
Ealing	Park Royal	75
H&F	Wandsworth Bridge Road (North)	71
Hounslow	Hanworth	67
Hounslow	Old Isleworth	61
Ealing	Sudbury Hill	59
H&F	Dawes Road	59
H&F	Bloemfontein Road	57
H&F	Edwards Woods Estate	51
H&F	Blythe Road	41

Rank by Borough

Borough	Centre	Total Rank
Hounslow	Hounslow West	147
Hounslow	Bedfont	123
Hounslow	Isleworth	111
Hounslow	Cranford	80
Hounslow	Heston	80
Hounslow	Hanworth	67
Hounslow	Old Isleworth	61
H&F	King Street West	169
H&F	Fulham Road	158
H&F	Uxbridge Road West	156
H&F	North End Rd/W.Kensington	155
H&F	Parson's Green	146
H&F	Uxbridge Road East	131
H&F	Fulham High Street	127
H&F	Askew Road	127
H&F	Shepherd's Bush Road	125
H&F	Munster Road	102
H&F	Fulham Palace Road	92
H&F	Greyhound Road	91
H&F	Goldhawk Road	90
H&F	Wandsworth Bridge Road (North)	71
H&F	Dawes Road	59
H&F	Bloemfontein Road	57
H&F	Edwards Woods Estate	51
H&F	Blythe Road	41
Ealing/H&F	East Acton	151
Ealing	Northfields	176
Ealing	South Ealing	166
Ealing	Pitshanger	135
Ealing	Northolt	95
Ealing	Perivale	90
Ealing	West Way Cross	82
Ealing	Park Royal	75
Ealing	Sudbury Hill	59

GVA Grimley

APPENDIX 10:

CONVENIENCE GOODS BASELINE CAPACITY FORECASTS

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

TABLE 1
POPULATION PROJECTIONS

SURVEY ZONE	POSTCODE SECTOR GROUPING	2006	2011	2016	2021
1	SW6 1/2/3/4/5/6/7	62,108	64,146	66,224	68,282
2	W14 0/9; W6 0/7/8/9	61,916	64,627	66,880	69,362
3	NW10 6; W12 0/7/8/9	48,434	50,262	52,706	54,842
4	W3 0/6/7/8/9	46,248	47,179	47,840	48,636
5	W13 9; W5 1/2/3/4/5	60,556	61,052	61,111	61,388
6	W13 0/8; W7 1/2/3	43,317	43,787	44,152	44,569
7	UB6 0/7/8	32,183	32,375	32,675	32,921
8	UB5 4/5/6	37,050	37,133	37,483	37,699
9	UB1 2; UB6 9	30,392	30,851	31,489	32,037
10	UB1 1/3; UB2 4/5	49,809	51,237	53,007	54,606
11	TW4 5/6/7; TW5 9	35,960	36,648	37,672	38,528
12	TW14 0/8/9	21,671	21,579	21,721	21,746
13	TW13 4/5/6/7	30,327	30,482	30,970	31,291
14	TW3 1/2/3/4; TW5 0	43,684	44,745	45,725	46,745
15	TW7 4/5/6/7	31,149	31,476	31,923	32,310
16	TW8 0/8/9	16,517	16,587	16,685	16,769
17	W4 1/2/3/4/5	42,330	42,398	42,286	42,264
18	SW13 0/8/9; SW14 8; SW15 1/5/6	53,278	55,622	57,932	60,259
19	SW14 7; TW10 6; TW9 1/2/3/4	37,431	40,437	42,684	45,310
20	TW1 1/2/3/4; TW2 5/6/7	57,206	62,132	66,158	70,634
21	TW12 1/2/3; TW16 5	28,031	29,421	30,775	32,147
22	TW15 1/2/3; TW16 7	34,768	35,232	35,835	36,368
23	TW19 7; TW6 1/2/3	10,279	10,556	10,856	11,144
24	UB11 1; UB3 1/4/5	22,914	24,218	25,250	26,418
25	UB3 2/3; UB4 0/8/9	56,676	60,156	62,839	65,920
26	HA1 3; HA2 0/8/9; HA4 0/6	64,006	65,762	67,089	68,630
27	HA0 1/2/4; HA9 6/7; NW10 0/2/3/4/5/7/8/9	110,759	109,724	109,963	109,565
28	W10 4/5/6; W11 12/3/4; W14 8; W2 4/5; W8 4/7; W9 2/3	133,266	153,915	171,288	190,299
29	SW10 0/9; SW3 5/6; SW5 0/9; SW7 2/3/4/5; W8 5/6	85,510	98,208	107,278	118,162
30	SW11 1/2/3/4/5/6; SW15 2; SW18 1/2/3/4/5	126,877	131,550	135,485	139,789
	TOTAL	**1,514,652**	**1,583,497**	**1,643,981**	**1,708,640**

TABLE 1A
POPULATION GROWTH RATES

SURVEY ZONE	2006-2011 (%)	2006-2016 (%)	2006-2021 (%)
1	3	7	10
2	4	8	12
3	4	9	13
4	2	3	5
5	1	1	1
6	1	2	3
7	1	2	2
8	0	1	2
9	2	4	5
10	3	6	10
11	2	5	7
12	0	0	0
13	1	2	3
14	2	5	7
15	1	2	4
16	0	1	2
17	0	0	0
18	4	9	13
19	8	14	21
20	9	16	23
21	5	10	15
22	1	3	5
23	3	6	8
24	6	10	15
25	6	11	16
26	3	5	7
27	-1	-1	-1
28	15	29	43
29	15	25	38
30	4	7	10
TOTAL	5	9	13

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2005 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Comparison Goods 4.30 %pa 2004-2021

ZONE	2004	2004 Minus SFT	2006	2011	2016	2021
1	3,972	3,674	3,997	4,933	6,089	7,516
2	3,999	3,699	4,024	4,967	6,131	7,567
3	3,296	3,049	3,317	4,094	5,053	6,237
4	3,477	3,216	3,499	4,319	5,330	6,579
5	4,178	3,865	4,204	5,189	6,405	7,906
6	3,600	3,330	3,623	4,471	5,519	6,812
7	2,428	2,246	2,443	3,016	3,722	4,594
8	2,618	2,422	2,634	3,252	4,013	4,954
9	2,226	2,059	2,240	2,765	3,413	4,212
10	2,064	1,909	2,077	2,564	3,164	3,906
11	2,270	2,100	2,284	2,819	3,480	4,295
12	2,778	2,570	2,795	3,450	4,259	5,257
13	2,783	2,574	2,800	3,457	4,266	5,266
14	2,365	2,188	2,380	2,937	3,626	4,475
15	3,287	3,040	3,308	4,083	5,039	6,220
16	3,343	3,092	3,364	4,152	5,125	6,326
17	4,575	4,232	4,604	5,682	7,014	8,657
18	4,076	3,770	4,102	5,063	6,249	7,713
19	4,497	4,160	4,525	5,585	6,894	8,509
20	3,864	3,574	3,888	4,799	5,924	7,312
21	3,750	3,469	3,773	4,658	5,749	7,096
22	3,112	2,879	3,131	3,865	4,771	5,889
23	2,959	2,737	2,978	3,675	4,536	5,599
24	2,414	2,233	2,429	2,998	3,701	4,568
25	2,428	2,246	2,443	3,016	3,722	4,594
26	2,875	2,659	2,893	3,571	4,407	5,440
27	2,436	2,253	2,451	3,026	3,734	4,609
28	3,882	3,591	3,906	4,822	5,951	7,346
29	4,895	4,528	4,926	6,080	7,504	9,262
30	3,494	3,232	3,516	4,340	5,356	6,611

Note: Special Forms of trading removed;
Comparison goods 7.5%

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

TABLE 3
SURVEY AREA COMPARIOSN GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	248,237	316,454	403,253	513,204
2	249,152	320,994	410,016	524,865
3	160,638	205,759	266,318	342,039
4	161,811	203,744	255,005	319,991
5	254,587	316,811	391,418	485,319
6	156,917	195,785	243,672	303,606
7	78,630	97,632	121,624	151,250
8	97,604	120,743	150,438	186,756
9	68,076	85,296	107,458	134,944
10	103,449	131,349	167,724	213,268
11	82,140	103,326	131,099	165,492
12	60,579	74,455	92,505	114,311
13	84,928	105,363	132,132	164,781
14	103,959	131,434	165,782	209,190
15	103,028	128,502	160,863	200,961
16	55,562	68,871	85,510	106,076
17	194,872	240,918	296,580	365,878
18	218,521	281,587	361,998	464,762
19	169,381	225,857	294,267	385,560
20	222,428	298,184	391,898	516,447
21	105,774	137,032	176,922	228,111
22	108,875	136,179	170,962	214,158
23	30,606	38,795	49,246	62,397
24	55,661	72,612	93,444	120,674
25	138,471	181,409	233,901	302,859
26	185,169	234,825	295,694	373,359
27	271,498	331,979	410,655	505,038
28	520,577	742,110	1,019,380	1,397,871
29	421,192	597,079	805,039	1,094,474
30	446,083	570,881	725,717	924,210
TOTAL	**5,158,407**	**6,695,964**	**8,610,521**	**11,091,852**

WEST LONDON RETAIL NEEDS STUDY 2006
EALING BOROUGH COUNCIL

CONVENIENCE GOODS
EALING BOROUGH COUNCIL

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	EALING TOWN CENTRE				HANWELL TOWN CENTRE				SOUTHALL TOWN CENTRE				ACTON TOWN CENTRE				GREENFORD TOWN CENTRE				NEIGHBOURHOOD CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
3	2	2	2	2	1	1	1	1	0	0	0	0	5	5	5	5	0	0	0	0	8	8	8	8	0	0	0	0	15	15	15	15
4	8	8	8	8	0	0	0	0	0	0	0	0	47	47	47	47	0	0	0	0	17	17	17	17	5	5	5	5	77	77	77	77
5	54	54	54	54	1	1	1	1	0	0	0	0	2	2	2	2	2	2	2	2	11	11	11	11	5	5	5	5	76	76	76	76
6	53	53	53	53	7	7	7	7	0	0	0	0	0	0	0	0	6	6	6	6	1	1	1	1	13	13	13	13	80	80	80	80
7	4	4	4	4	0	0	0	0	0	0	0	0	0	0	0	0	12	12	12	12	3	3	3	3	43	43	43	43	62	62	62	62
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9	9	9	9	1	1	1	1	10	10	10	10	20	20	20	20
9	5	5	5	5	0	0	0	0	10	10	10	10	1	1	1	1	30	30	30	30	1	1	1	1	4	4	4	4	50	50	50	50
10	7	7	7	7	0	0	0	0	12	12	12	12	1	1	1	1	8	8	8	8	0	0	0	0	7	7	7	7	35	35	35	35
11	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
16	7	7	7	7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	1	1	1	1	10	10	10	10
17	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	0	0	0	0	3	3	3	3
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2	2	2	2
24	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	4	4	4	4
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	2	2	2	2	3	3	3	3
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1
27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	14	14	14	14	2	2	2	2	17	17	17	17
28	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	4	4	4	0	0	0	0	4	4	4	4
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

TABLE 5
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	EALING TOWN CENTRE				HANWELL TOWN CENTRE				SOUTHALL TOWN CENTRE				ACTON TOWN CENTRE				GREENFORD TOWN CENTRE				NEIGHBOURHOOD CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	1,062	1,148	1,231	1,322	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,062	1,148	1,231	1,322
3	1,273	1,367	1,485	1,600	561	603	655	706	0	0	0	0	3,818	4,102	4,455	4,800	0	0	0	0	5,708	6,134	6,660	7,176	0	0	0	0	11,360	12,207	13,255	14,281
4	6,214	6,564	6,892	7,255	0	0	0	0	0	0	0	0	34,875	36,840	38,682	40,722	0	0	0	0	12,502	13,207	13,867	14,598	3,919	4,139	4,346	4,575	57,510	60,750	63,788	67,151
5	62,742	65,501	67,891	70,619	1,564	1,633	1,693	1,761	0	0	0	0	2,433	2,540	2,633	2,739	2,433	2,540	2,633	2,739	13,064	13,638	14,136	14,704	6,344	6,623	6,864	7,140	88,580	92,475	95,850	99,702
6	38,838	40,653	42,447	44,369	4,956	5,188	5,417	5,662	0	0	0	0	0	0	0	0	4,274	4,474	4,672	4,883	737	771	805	842	9,894	10,356	10,813	11,303	58,699	61,442	64,154	67,058
7	1,472	1,533	1,602	1,671	0	0	0	0	0	0	0	0	0	0	0	0	4,967	5,174	5,407	5,641	1,124	1,171	1,224	1,277	17,640	18,375	19,203	20,034	25,202	26,252	27,436	28,624
8	173	180	188	196	0	0	0	0	173	180	188	196	0	0	0	0	4,602	4,776	4,992	5,199	440	457	477	497	5,402	5,606	5,860	6,103	10,791	11,199	11,706	12,191
9	1,595	1,676	1,772	1,867	0	0	0	0	3,396	3,570	3,773	3,975	284	299	316	333	10,388	10,919	11,540	12,158	284	299	316	333	1,396	1,468	1,551	1,634	17,344	18,231	19,269	20,300
10	3,357	3,576	3,831	4,086	213	227	243	259	6,050	6,444	6,904	7,364	413	440	472	503	3,820	4,069	4,359	4,650	0	0	0	0	3,670	3,909	4,188	4,467	17,524	18,666	19,996	21,331
11	386	408	434	460	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	386	408	434	460
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	163	172	182	193	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	163	172	182	193
15	411	430	452	473	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	411	430	452	473
16	1,831	1,904	1,984	2,064	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	679	706	736	765	288	300	312	325	2,799	2,910	3,031	3,155
17	238	247	255	264	584	606	626	648	0	0	0	0	822	853	881	912	0	0	0	0	1,104	1,145	1,182	1,224	0	0	0	0	2,748	2,851	2,944	3,047
18	0	0	0	0	0	0	0	0	0	0	0	0	353	382	412	443	0	0	0	0	0	0	0	0	0	0	0	0	353	382	412	443
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	266	283	301	320	266	283	301	320
24	351	384	415	449	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	351	384	415	449	351	384	415	449	1,053	1,152	1,244	1,348
25	0	0	0	0	0	0	0	0	275	302	327	355	0	0	0	0	0	0	0	0	605	665	719	782	1,265	1,391	1,504	1,634	2,146	2,358	2,551	2,771
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	705	750	792	839	0	0	0	0	705	750	792	839
27	0	0	0	0	0	0	0	0	0	0	0	0	500	513	532	549	1,679	1,723	1,788	1,844	19,758	20,268	21,033	21,701	2,465	2,529	2,624	2,708	24,403	25,033	25,978	26,802
28	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8,587	10,269	11,834	13,614	0	0	0	0	8,587	10,269	11,834	13,614
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	119,943	125,572	130,877	136,696	7,879	8,257	8,633	9,035	10,058	10,669	11,374	12,084	43,500	45,970	48,383	51,001	32,163	33,675	35,391	37,114	65,648	69,864	74,197	78,801	52,900	55,363	57,983	60,694	332,091	349,369	366,838	385,424

CONVENIENCE GOODS
HAMMERSMITH & FULHAM BOROUGH COUNCIL

TABLE 6
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	HAMMERSMITH TOWN CENTRE				FULHAM TOWN CENTRE				SHEPHERD'S BUSH TOWN CENTRE				KEY LOCAL SHOPPING CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1	1	1	1	38	38	38	38	0	0	0	0	1	1	1	1	24	24	24	24	64	64	64	64
2	20	20	20	20	9	9	9	9	4	4	4	4	5	5	5	5	29	29	29	29	66	66	66	66
3	6	6	6	6	0	0	0	0	8	8	8	8	5	5	5	5	17	17	17	17	36	36	36	36
4	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	2	2	2	2
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
18	3	3	3	3	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	6	6	6	6
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
28	2	2	2	2	0	0	0	0	4	4	4	4	0	0	0	0	1	1	1	1	7	7	7	7
29	0	0	0	0	3	3	3	3	0	0	0	0	0	0	0	0	2	2	2	2	5	5	5	5
30	0	0	0	0	2	2	2	2	0	0	0	0	0	0	0	0	1	1	1	1	3	3	3	3

TABLE 7
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	HAMMERSMITH TOWN CENTRE				FULHAM TOWN CENTRE				SHEPHERD'S BUSH TOWN CENTRE				KEY LOCAL SHOPPING CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	1,047	1,119	1,197	1,278	42,999	45,987	49,161	52,488	283	303	323	345	1,358	1,452	1,552	1,658	26,959	28,832	30,823	32,909	72,646	77,693	83,057	88,678
2	22,599	24,425	26,174	28,109	10,280	11,111	11,906	12,786	4,135	4,469	4,789	5,143	5,312	5,742	6,153	6,608	33,223	35,909	38,479	41,324	75,549	81,656	87,502	93,970
3	4,697	5,048	5,481	5,906	0	0	0	0	5,989	6,435	6,988	7,529	3,574	3,841	4,171	4,494	13,025	13,997	15,198	16,375	27,286	29,321	31,838	34,304
4	0	0	0	0	0	0	0	0	243	256	269	283	466	493	517	545	672	710	745	784	1,381	1,459	1,532	1,612
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	121	127	134	141	121	127	134	141
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	163	172	182	193	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	163	172	182	193
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	238	247	255	264	0	0	0	0	238	247	255	264	0	0	0	0	0	0	0	0	476	494	510	528
18	3,051	3,299	3,558	3,832	0	0	0	0	0	0	0	0	0	0	0	0	2,497	2,699	2,911	3,135	5,548	5,997	6,468	6,967
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	163	178	192	208	163	178	192	208
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
28	3,935	4,707	5,424	6,240	0	0	0	0	9,958	11,909	13,724	15,788	0	0	0	0	2,147	2,567	2,958	3,403	16,040	19,183	22,106	25,431
29	0	0	0	0	5,613	6,676	7,551	8,612	0	0	0	0	0	0	0	0	3,250	3,865	4,372	4,986	8,863	10,540	11,922	13,598
30	0	0	0	0	5,462	5,864	6,254	6,682	0	0	0	0	0	0	0	0	1,918	2,059	2,196	2,346	7,380	7,923	8,450	9,028
TOTAL	35,730	39,017	42,270	45,820	64,355	69,637	74,873	80,569	20,845	23,619	26,348	29,353	10,711	11,528	12,393	13,304	83,974	90,941	98,008	105,612	215,615	234,743	253,893	274,658

CONVENIENCE GOODS
HOUNSLOW BOROUGH COUNCIL

TABLE 8
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	HOUNSLOW TOWN CENTRE				CHISWICK TOWN CENTRE				FELTHAM TOWN CENTRE				BRENTFORD TOWN CENTRE				MAJOR NEIGHBOURHOOD CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	7	7	7	7	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	8	8	8	8
3	0	0	0	0	16	16	16	16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	16	16	16	16
4	0	0	0	0	6	6	6	6	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	7	7	7	7
5	0	0	0	0	2	2	2	2	0	0	0	0	1	1	1	1	0	0	0	0	7	7	7	7	10	10	10	10
6	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	8	8	8	8	10	10	10	10
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2	2	2	2
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8	8	8	8	8	8	8	8
10	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	35	35	35	35	37	37	37	37
11	5	5	5	5	0	0	0	0	5	5	5	5	0	0	0	0	14	14	14	14	48	48	48	48	72	72	72	72
12	0	0	0	0	0	0	0	0	17	17	17	17	1	1	1	1	2	2	2	2	51	51	51	51	72	72	72	72
13	0	0	0	0	0	0	0	0	55	55	55	55	0	0	0	0	2	2	2	2	6	6	6	6	63	63	63	63
14	13	13	13	13	0	0	0	0	6	6	6	6	0	0	0	0	4	4	4	4	58	58	58	58	82	82	82	82
15	2	2	2	2	1	1	1	1	0	0	0	0	0	0	0	0	4	4	4	4	78	78	78	78	85	85	85	85
16	0	0	0	0	4	4	4	4	1	1	1	1	38	38	38	38	0	0	0	0	37	37	37	37	80	80	80	80
17	0	0	0	0	77	77	77	77	1	1	1	1	0	0	0	0	0	0	0	0	2	2	2	2	79	79	79	79
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	0	0	0	0	3	3	3	3	5	5	5	5
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	26	26	26	26	26	26	26	26
21	0	0	0	0	0	0	0	0	4	4	4	4	0	0	0	0	0	0	0	0	3	3	3	3	6	6	6	6
22	0	0	0	0	0	0	0	0	3	3	3	3	0	0	0	0	0	0	0	0	1	1	1	1	3	3	3	3
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	43	43	43	43	44	44	44	44
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	11	11	11	11	11	11	11	11
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
28	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

TABLE 9
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	HOUNSLOW TOWN CENTRE				CHISWICK TOWN CENTRE				FELTHAM TOWN CENTRE				BRENTFORD TOWN CENTRE				MAJOR NEIGHBOURHOOD CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	8,586	9,280	9,944	10,679	0	0	0	0	0	0	0	0	0	0	0	0	1,062	1,148	1,231	1,322	9,648	10,428	11,175	12,001
3	0	0	0	0	11,603	12,468	13,539	14,587	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	11,603	12,468	13,539	14,587
4	0	0	0	0	4,833	5,105	5,360	5,643	0	0	0	0	0	0	0	0	0	0	0	0	672	710	745	784	5,505	5,815	6,106	6,427
5	0	0	0	0	2,346	2,449	2,539	2,641	0	0	0	0	782	816	846	880	0	0	0	0	8,226	8,588	8,902	9,259	11,355	11,854	12,287	12,781
6	0	0	0	0	240	251	262	274	0	0	0	0	848	887	926	968	0	0	0	0	6,098	6,383	6,665	6,967	7,185	7,521	7,853	8,209
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	368	383	401	418	368	383	401	418
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	920	955	998	1,040	920	955	998	1,040
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2,655	2,791	2,950	3,108	2,655	2,791	2,950	3,108
10	626	667	715	762	0	0	0	0	0	0	0	0	0	0	0	0	413	440	472	503	17,637	18,786	20,125	21,468	18,676	19,894	21,311	22,734
11	2,114	2,231	2,375	2,515	193	204	217	230	1,932	2,039	2,170	2,298	193	204	217	230	5,817	6,139	6,534	6,920	20,725	21,871	23,280	24,654	30,975	32,688	34,794	36,847
12	0	0	0	0	0	0	0	0	5,427	5,596	5,833	6,047	479	494	514	533	690	711	741	768	16,654	17,172	17,899	18,555	23,250	23,973	24,987	25,903
13	167	174	183	191	0	0	0	0	24,333	25,326	26,645	27,876	0	0	0	0	846	880	926	969	2,672	2,781	2,925	3,061	28,018	29,161	30,679	32,097
14	6,934	7,354	7,782	8,238	0	0	0	0	3,264	3,462	3,663	3,878	0	0	0	0	2,329	2,471	2,614	2,768	31,677	33,598	35,552	37,635	44,204	46,885	49,612	52,519
15	872	913	958	1,004	411	430	452	473	0	0	0	0	237	248	260	273	1,844	1,929	2,026	2,124	38,957	40,763	42,810	44,867	42,321	44,283	46,506	48,741
16	0	0	0	0	1,125	1,170	1,218	1,268	288	300	312	325	10,426	10,842	11,293	11,753	0	0	0	0	10,165	10,571	11,011	11,459	22,004	22,882	23,834	24,804
17	0	0	0	0	66,547	69,020	71,281	73,773	584	606	626	648	0	0	0	0	0	0	0	0	1,407	1,459	1,507	1,559	68,538	71,085	73,414	75,980
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	819	916	1,002	1,101	0	0	0	0	819	916	1,002	1,101	0	0	0	0	2,457	2,749	3,005	3,303	4,096	4,582	5,008	5,505
20	0	0	0	0	0	0	0	0	466	524	578	639	0	0	0	0	0	0	0	0	26,764	30,100	33,188	36,691	27,230	30,624	33,766	37,330
21	0	0	0	0	0	0	0	0	1,809	1,966	2,130	2,304	0	0	0	0	0	0	0	0	1,395	1,516	1,642	1,776	3,204	3,482	3,771	4,079
22	0	0	0	0	0	0	0	0	1,384	1,452	1,529	1,607	0	0	0	0	0	0	0	0	448	470	495	520	1,831	1,922	2,024	2,127
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	175	192	207	225	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12,692	13,890	14,996	16,247	12,867	14,082	15,204	16,471
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7,739	8,506	9,201	9,994	7,739	8,506	9,201	9,994
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	705	750	792	839	705	750	792	839
27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
28	0	0	0	0	894	1,070	1,233	1,418	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	894	1,070	1,233	1,418
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	10,889	11,531	12,220	12,936	97,598	102,363	107,046	112,087	39,487	41,270	43,485	45,621	13,783	14,407	15,059	15,738	11,939	12,571	13,314	14,052	212,095	225,940	240,318	255,525	385,792	408,082	431,442	455,959

CONVENIENCE GOODS
FLOORSPACE SCHEDULE: EALING BOROUGH COUNCIL

TABLE 10: EALING CONVENIENCE RETAIL PROVISION

	Net Flsp sq m	Net Con Ration (%)	Net Convenience (sq m)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
EALING - TOWN CENTRE FLOORSPACE					
Tesco Express, The Parade	186	95	177	12,435	2,197
Budgens, New Broadway	137	95	130	3,315	431
Budgens, The Station	106	95	101	3,315	334
Sainsburys, Melbourne Avenue	2,079	80	1,663	10,152	16,885
Waitrose, Alexandria Road	1,579	80	1,263	10,565	13,346
M&S, The Broadway	836	95	794	9,641	7,657
Iceland, New Broadway	535	95	508	4,717	2,397
Sainsbury's Local, Ealing Broadway	264	95	251	10,152	2,546
Other	3,986	95	3,787	3,000	11,360
SUB-TOTAL	**9,708**		**8,674**	**6,589**	**57,154**
HANWELL - TOWN CENTRE FLOORSPACE					
Lidl, Uxbridge Road	793	95	753	2,826	2,129
Other	844	95	802	3,000	2,405
SUB-TOTAL	**1,637**		**1,555**	**2,916**	**4,534**
SOUTHALL - TOWN CENTRE FLOORSPACE					
Iceland, South Road	450	95	428	4,717	2,017
Somerfield, The Broadway	513	95	487	5,391	2,627
Other	6,444	95	6,122	3,000	18,365
SUB-TOTAL	**7,407**		**7,037**	**3,270**	**23,009**
ACTON - TOWN CENTRE FLOORSPACE					
Morrisons, King Street	2,494	80	1,995	11,130	22,207
Iceland, The Oaks Shopping Centre	474	95	450	4,717	2,124
Netto, The Oaks Shopping Centre	475	95	451	2,978	1,344
Other	2,655	80	2,124	3,000	6,372
SUB-TOTAL	**6,098**		**5,021**	**6,383**	**32,046**
GREENFORD - TOWN CENTRE FLOORSPACE					
Tesco Metro, Greenford Road	1,161	85	987	12,435	12,271
Other	2,281	95	2,167	3,000	6,501
SUB-TOTAL	**3,442**		**3,154**	**5,952**	**18,772**
PARK ROYAL - TOWN CENTRE FLOORSPACE					
Asda, Western Road	5,413	80	4,330	13,228	57,283
Other	122	95	116	3,000	348
SUB-TOTAL	**5,535**		**4,446**	**12,961**	**57,630**
EAST ACTON - TOWN CENTRE FLOORSPACE					
Other	577	95	548	3,000	1,644
SUB-TOTAL	**577**		**548**	**3,000**	**1,644**
NORTHFIELDS - TOWN CENTRE FLOORSPACE					
NorthfieldsTesco Express, Northfield Ave.	245	95	233	12,435	2,894
Other	812	95	771	3,000	2,314
SUB-TOTAL	**1,057**		**1,004**	**5,187**	**5,208**
PITSHANGER					
Welcome Co-op, 107-109 Pitshanger Lane	128	95	122	5,239	637
Other	543	95	516	3,000	1,548
SUB-TOTAL	**671**		**637**	**3,427**	**2,185**
SOUTH EALING - TOWN CENTRE FLOORSPACE					
Co-Op, The Woodlands, South Ealing Road	274	95	260	5,239	1,364
Sainsbury's Local, South Ealing Road	279	95	265	10,152	2,691
Other	1,000	95	950	3,000	2,850
SUB-TOTAL	**1,553**		**1,475**	**4,680**	**6,904**
NORTHOLT - TOWN CENTRE FLOORSPACE					
Co-op, Church Road	184	95	175	5,239	916
Other	120	95	114	3,000	342
SUB-TOTAL	**304**		**289**	**4,355**	**1,258**
PERIVALE - TOWN CENTRE FLOORSPACE					
Other	406	95	386	3,000	1,157
SUB-TOTAL	**406**		**386**	**3,000**	**1,157**
SUDBURY HILL - TOWN CENTRE FLOORSPACE					
Iceland, Greenford Road	453	95	430	4,717	2,030
Other	277	95	263	3,000	789
SUB-TOTAL	**730**		**694**	**4,065**	**2,819**
WEST WAY CROSS - TOWN CENTRE FLOORSPACE					
Other	0	0	0	3,000	0
SUB-TOTAL	**0**		**0**	**0**	**0**
OUT OF CENTRE FLOORSPACE					
Tesco Express, Ealing Common	234	95	222	12,435	2,764
Tesco, Old Hoover Building	3,471	80	2,777	12,435	34,530
Tesco Express, Church Road, Northolt	225	95	214	12,435	2,658
SUB-TOTAL	**3,930**		**3,213**	**12,435**	**39,952**
TOTAL	**43,055**		**38,133**	**6,668**	**254,274**

Note: Other includes small local stores such as bakers, butchers, Londis, Costcutter and other general convenience stores

CONVENIENCE GOODS
FLOORSPACE SCHEDULE: HAMMERSMITH & FULHAM BOROUGH COUNCIL

TABLE 11

	Net Flsp sq m	Net Con Ration (%)	Net Convenience (sq m)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
HAMMERSMITH - TOWN CENTRE FLOORSPACE					
Iceland, King Street	463	95	440	4,717	2,075
Tesco Metro, Broadway Shopping Centre	664	95	631	12,435	7,844
Sainsbury's, Kings Mall	1,730	80	1,384	10,152	14,050
M&S, King Street	836	95	794	9,641	7,657
Other	51	95	48	3,000	145
SUB-TOTAL	**3,744**		**3,297**	**9,636**	**31,771**
FULHAM - TOWN CENTRE FLOORSPACE					
Somerfield, North End Road	1,013	85	861	5,391	4,642
Sainsbury's Central, Shopping Centre	1,238	85	1,052	10,152	10,683
Sainsbury's, North End Road	163	95	155	10,152	1,572
Waitrose, North End Road	1,635	80	1,308	10,565	13,819
M&S, Jerdan Place	186	95	177	9,641	1,704
Iceland, North End Road	440	95	418	4,717	1,972
Other	967	95	919	3,000	2,756
SUB-TOTAL	**5,642**		**4,890**	**7,597**	**37,147**
SHEPHERD'S BUSH - TOWN CENTRE FLOORSPACE					
Tesco Express, Goldhawk Road	177	95	168	12,435	2,091
Morrisons, West 12 Shopping Centre	2,197	80	1,758	11,130	19,562
M&S, Shepherd's Bush Green	52	95	49	9,641	476
Budgens, Uxbridge Road	94	95	89	3,315	296
Sainsbury's Local, Uxbridge Road	295	95	280	10,152	2,845
Other	1,839	95	1,747	3,000	5,241
SUB-TOTAL	**4,654**		**4,092**	**7,457**	**30,512**
NORTH END RD/WEST KENSINGTON - TOWN CENTRE FLOORSPACE					
Tesco Express, North End Road	186	95	177	12,435	2,197
Other	1,003	95	953	3,000	2,859
SUB-TOTAL	**1,189**		**1,130**	**4,476**	**5,056**
EAST ACTON - TOWN CENTRE FLOORSPACE					
Iceland, Old Oak Common Lane	424				
Other	97	95	92	3,000	276
SUB-TOTAL	**521**		**92**	**3,000**	**276**
BLOEMFONTEIN ROAD - TOWN CENTRE FLOORSPACE					
Other	255	95	242	3,000	727
SUB-TOTAL	**255**		**242**	**3,000**	**727**
UXBRIDGE ROAD WEST - TOWN CENTRE FLOORSPACE					
Other	779	95	740	3,000	2,220
SUB-TOTAL	**779**		**740**	**3,000**	**2,220**
UXBRIDGE ROAD EAST - TOWN CENTRE FLOORSPACE					
Other	1,340	95	1,273	3,000	3,819
SUB-TOTAL	**1,340**		**1,273**	**3,000**	**3,819**
EDWARDS WOODS ESTATE					
Other	358	95	340	3,000	1,020
SUB-TOTAL	**358**		**340**	**3,000**	**1,020**
ASKEW ROAD - TOWN CENTRE FLOORSPACE					
Other	735	95	698	3,000	2,095
SUB-TOTAL	**735**		**698**	**3,000**	**2,095**
GOLDHAWK ROAD - TOWN CENTRE FLOORSPACE					
Other	374	95	355	3,000	1,066
SUB-TOTAL	**374**		**355**	**3,000**	**1,066**
SHEPHERD'S BUSH ROAD - TOWN CENTRE FLOORSPACE					
Other	368	95	350	3,000	1,049
SUB-TOTAL	**368**		**350**	**3,000**	**1,049**
BLYTHE ROAD - TOWN CENTRE FLOORSPACE					
Other	160	95	152	3,000	456
SUB-TOTAL	**160**		**152**	**3,000**	**456**
GREYHOUND ROAD - TOWN CENTRE FLOORSPACE					
Sainsburys, Fulham Palace Road	279	95	265	10,152	2,691
Other	99	95	94	3,000	282
SUB-TOTAL	**378**		**359**	**8,279**	**2,973**
MUNSTER ROAD/FULHAM CROSS - TOWN CENTRE FLOORSPACE					
Budgens	213	95	202	3,315	671
Other	128	95	122	3,000	365
SUB-TOTAL	**341**		**324**	**3,197**	**1,036**
FULHAM PALACE ROAD (CENTRAL) - TOWN CENTRE FLOORSPACE					
Other	191	95	181	3,000	544
SUB-TOTAL	**191**		**181**	**3,000**	**544**
FULHAM HIGH STREET - TOWN CENTRE FLOORSPACE					
Other	175	95	166	3,000	499
SUB-TOTAL	**175**		**166**	**3,000**	**499**
FULHAM ROAD - TOWN CENTRE FLOORSPACE					
Other	296	95	281	3,000	844
SUB-TOTAL	**296**		**281**	**3,000**	**844**
PARSONS GREEN - TOWN CENTRE FLOORSPACE					
Budgens	242	95	230	3,315	762
Other	353	95	335	3,000	1,006
SUB-TOTAL	**595**		**565**	**3,128**	**1,768**
WANDSWORTH BRIDGE ROAD (NORTH) - TOWN CENTRE FLOORSPACE					
Other	214	95	203	3,000	610
SUB-TOTAL	**214**		**203**	**3,000**	**610**
KING STREET WEST - TOWN CENTRE FLOORSPACE					
Tesco Express	200	95	190	12,435	2,363
Other	1,315	95	1,249	3,000	3,748
SUB-TOTAL	**1,515**		**1,439**	**4,246**	**6,110**
DAWES ROAD - TOWN CENTRE FLOORSPACE					
Other	131	95	124	3,000	373
SUB-TOTAL	**131**		**124**	**3,000**	**373**
OUT OF CENTRE FLOORSPACE					
Tesco, 180 Shepherd's Bush Road (near Hammersmith)	2,717	80	2,174	12,435	27,029
Tesco Express, 335/337 Fulham Palace Road	174	95	165	12,435	2,056
M&S Simply Food, Imperial Wharf, Townend Road	200	95	190	9,641	1,832
Tesco Express, Kings Road	197	95	187	12,435	2,327
Sainsburys, Townmead Road (near Fulham)	3,160	80	2,528	10,152	25,664
SUB-TOTAL	**6,448**		**5,244**	**11,233**	**58,907**
TOTAL	**30,403**		**26,539**	**7,192**	**190,879**

CONVENIENCE GOODS
FLOORSPACE SCHEDULE: HOUNSLOW BOROUGH COUNCIL

TABLE 12

	Net Flsp sq m	Net Con Ration (%)	Net Convenience (sq m)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
HOUNSLOW - TOWN CENTRE FLOORSPACE					
M&S, High Street	836	95	794	9,641	7,657
Tesco, High Street	331	95	314	12,435	3,910
Iceland, High Street	297	95	282	4,717	1,331
Other	625	95	594	3,000	1,781
SUB-TOTAL	**2,089**		**1,985**	**7,397**	**14,679**
CHISWICK - TOWN CENTRE FLOORSPACE					
Sainsbury's, Essex Place	3,603	80	2,882	10,152	29,262
Tesco Express, Chiswick High Road	141	95	134	12,435	1,666
Sainsbury's Local, Chiswick High Road	254	95	241	10,152	2,450
M&S Simply Food, Chiswick High Road	836	95	794	9,641	7,657
Other	2,531	95	2,404	3,000	7,213
SUB-TOTAL	**7,365**		**6,456**	**7,473**	**48,248**
FELTHAM - TOWN CENTRE FLOORSPACE					
Asda, Tilley Road	4,840	80	3,872	13,228	51,219
Lidl, Hounslow Roa	836	95	794	2,826	2,244
Tesco, High Street	2,401	80	1,921	12,435	23,885
Aldi, High Street	754	95	716	4,109	2,943
Other	736	95	699	3,000	2,098
SUB-TOTAL	**9,567**		**8,003**	**10,295**	**82,389**
BRENTFORD - TOWN CENTRE FLOORSPACE					
Somerfield, High Street	1,933	80	1,546	5,391	8,337
Other	875	95	831	3,000	2,494
SUB-TOTAL	**2,808**		**2,378**	**4,555**	**10,830**
HOUNSLOW WEST - TOWN CENTRE FLOORSPACE					
Iceland, Bath Road	615	95	584	4,717	2,756
Somerfield, Bath Road	2,055	80	1,644	5,391	8,863
Other	1,634	80	1,307	3,000	3,922
SUB-TOTAL	**4,304**		**3,535**	**4,396**	**15,540**
BEDFONT - TOWN CENTRE FLOORSPACE					
Budgens, Staines Road	502	95	477	3,315	1,581
Other	363	95	345	3,000	1,035
SUB-TOTAL	**865**		**822**	**3,183**	**2,615**
OLD ISLEWORTH - TOWN CENTRE FLOORSPACE					
Other	244	95	232	3,000	695
SUB-TOTAL	**244**		**232**	**3,000**	**695**
HESTON - TOWN CENTRE FLOORSPACE					
Other	330	95	314	3,000	941
SUB-TOTAL	**330**		**314**	**3,000**	**941**
CRANFORD					
Tesco Express, Bath Road	367	**95**	349	**12,435**	4,335
Other	320	95	304	3,000	912
SUB-TOTAL	**687**		**653**	**8,040**	**5,247**
HANWORTH - TOWN CENTRE FLOORSPACE					
Other	351	95	333	3,000	1,000
SUB-TOTAL	**351**		**333**	**3,000**	**1,000**
ISLEWORTH - TOWN CENTRE FLOORSPACE					
Other	711	95	675	3,000	2,026
SUB-TOTAL	**711**		**675**	**3,000**	**2,026**
OUT OF CENTRE FLOORSPACE					
Tesco, Syon Lane, Osterley	4,704	80	3,763	12,435	46,795
Tesco, Dukes Green Avenue	3,680	80	2,944	12,435	36,609
Tesco Extra, Bulls Bridge Industrial Estate Hayes Road, (Southall)	5,415	80	4,332	12,435	53,868
Tesco Extra, Mogden Lane, Twickenham	4,608	80	3,686	1,245	4,590
Tesco Express, London Road, Isleworth	200	95	190	12,435	2,363
Tesco Express, Bear Road, Hanworth	186	95	177	12,435	2,197
Aldi, Hopsital Road	250	95	238	4,109	976
SUB-TOTAL	**19,043**		**15,330**	**9,615**	**147,398**
TOTAL	**48,364**		**40,715**	**8,145**	**331,610**

CONVENIENCE GOODS CAPACITY
GLOBAL CAPACITY

TABLE 13

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	933,498	992,194	1,052,173	1,116,040
Existing Shop Floorspace (sq m net)	105,386	105,386	105,386	105,386
Sales per sq m net £	8,858	7,371	7,371	7,371
Sales from Existing Floorspace (£000)	933,498	776,763	776,763	776,763
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	215,431	275,410	339,277
Sales per sq m net in new shops (£) Based on large store format	12,000	12,000	12,000	12,000
Capacity for new floorspace (sq m net)	0	17,953	22,951	28,273

CONVENIENCE GOODS CAPACITY
CAPACITY BY LONDON BOROUGH

TABLE 14

	EALING BOROUGH				HAMMERSMITH & FULHAM BOROUGH				HOUNSLOW BOROUGH			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Residents Spending (£000)	332,091	349,369	366,838	385,424	215,615	234,743	253,893	274,658	385,792	408,082	431,442	455,959
Existing Shop Floorspace (sq m net)	38,133	38,133	38,133	38,133	26,539	26,539	26,539	26,539	40,715	40,715	40,715	40,715
Sales per sq m net £	8,709	6,668	6,668	6,668	8,124	7,192	7,192	7,192	9,475	8,145	8,145	8,145
Sales from Existing Floorspace (£000)	332,091	254,274	254,274	254,274	215,615	190,879	190,879	190,879	385,792	331,610	331,610	331,610
Sales from Committed Floorspace (£000)	0	0	0	0	0	0	0	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	95,095	112,564	131,150	0	43,864	63,014	83,779	0	76,472	99,832	124,348
Sales per sq m net in new shops (£) Based on large store format	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000
Capacity for new floorspace (sq m net)	0	7,925	9,380	10,929	0	3,655	5,251	6,982	0	6,373	8,319	10,362

CONVENIENCE GOODS CAPACITY
CAPACITY BY MAJOR CENTRE

TABLE 15
LONDON BOROUGH OF EALING

	EALING				HANWELL				SOUTHALL				ACTON				GREENFORD			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Residents Spending (£000)	119,943	125,572	130,877	136,696	7,879	8,257	8,633	9,035	10,058	10,669	11,374	12,084	43,500	45,970	48,383	51,001	32,163	33,675	35,391	37,114
Existing Shop Floorspace (sq m net)	8,674	8,674	8,674	8,674	1,555	1,555	1,555	1,555	7,037	7,037	7,037	7,037	5,021	5,021	5,021	5,021	3,154	3,154	3,154	3,154
Sales per sq m net £	13,828	6,589	6,589	6,589	5,066	2,916	2,916	2,916	1,429	3,270	3,270	3,270	8,664	6,383	6,383	6,383	10,198	5,952	5,952	5,952
Sales from Existing Floorspace (£000)	119,943	57,154	57,154	57,154	7,879	4,534	4,534	4,534	10,058	23,009	23,009	23,009	43,500	32,046	32,046	32,046	32,163	18,772	18,772	18,772
Sales from Committed Floorspace (£000)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	68,418	73,723	79,542	0	3,722	4,099	4,501	0	-12,340	-11,635	-10,925	0	13,924	16,336	18,954	0	14,902	16,618	18,342
Sales per sq m net in new shops (£) Based on large store format	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000
Capacity for new floorspace (sq m net)	0	5,702	6,144	6,628	0	310	342	375	0	-1,028	-970	-910	0	1,160	1,361	1,580	0	1,242	1,385	1,528

TABLE 16
LONDON BOROUGH OF HAMMERSMITH & FULHAM

	HAMMERSMITH				FULHAM				SHEPHERD'S BUSH			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Residents Spending (£000)	35,730	39,017	42,270	45,820	64,355	69,637	74,873	80,569	20,845	23,619	26,348	29,353
Existing Shop Floorspace (sq m net)	3,297	3,297	3,297	3,297	4,890	4,890	4,890	4,890	4,092	4,092	4,092	4,092
Sales per sq m net £	10,836	9,636	9,636	9,636	13,162	7,597	7,597	7,597	5,094	7,457	7,457	7,457
Sales from Existing Floorspace (£000)	35,730	31,771	31,771	31,771	64,355	37,147	37,147	37,147	20,845	30,512	30,512	30,512
Sales from Committed Floorspace (£000)	0	0	0	0	0	0	0	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	7,246	10,499	14,049	0	32,490	37,726	43,422	0	-6,892	-4,163	-1,159
Sales per sq m net in new shops (£) Based on large store format	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000
Capacity for new floorspace (sq m net)	0	604	875	1,171	0	2,708	3,144	3,618	0	-574	-347	-97

TABLE 17
LONDON BOROUGH OF HOUNSLOW

	HOUNSLOW				CHISWICK				FELTHAM				BRENTFORD			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Residents Spending (£000)	10,889	11,531	12,220	12,936	97,598	102,363	107,046	112,087	39,487	41,270	43,485	45,621	13,783	14,407	15,059	15,738
Existing Shop Floorspace (sq m net)	1,985	1,985	1,985	1,985	6,456	6,456	6,456	6,456	8,003	8,003	8,003	8,003	2,378	2,378	2,378	2,378
Sales per sq m net £	5,487	7,397	7,397	7,397	15,117	7,473	7,473	7,473	4,934	10,295	10,295	10,295	5,797	4,555	4,555	4,555
Sales from Existing Floorspace (£000)	10,889	14,679	14,679	14,679	97,598	48,248	48,248	48,248	39,487	82,389	82,389	82,389	13,783	10,830	10,830	10,830
Sales from Committed Floorspace (£000)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	-3,148	-2,459	-1,743	0	54,116	58,799	63,839	0	-41,119	-38,904	-36,769	0	3,576	4,228	4,907
Sales per sq m net in new shops (£) Based on large store format	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000
Capacity for new floorspace (sq m net)	0	-262	-205	-145	0	4,510	4,900	5,320	0	-3,427	-3,242	-3,064	0	298	352	409

APPENDIX 11:

CONVENIENCE GOODS CAPACITY FORECASTS WITH COMMITMENTS

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

TABLE 1
POPULATION PROJECTIONS

SURVEY ZONE	POSTCODE SECTOR GROUPING	2006	2011	2016	2021
1	SW6 1/2/3/4/5/6/7	62,108	64,146	66,224	68,282
2	W14 0/9; W6 0/7/8/9	61,916	64,627	66,880	69,362
3	NW10 6; W12 0/7/8/9	48,434	50,262	52,706	54,842
4	W3 0/6/7/8/9	46,248	47,179	47,840	48,636
5	W13 9; W5 1/2/3/4/5	60,556	61,052	61,111	61,388
6	W13 0/8; W7 1/2/3	43,317	43,787	44,152	44,569
7	UB6 0/7/8	32,183	32,375	32,675	32,921
8	UB5 4/5/6	37,050	37,133	37,483	37,699
9	UB1 2; UB6 9	30,392	30,851	31,489	32,037
10	UB1 1/3; UB2 4/5	49,809	51,237	53,007	54,606
11	TW4 5/6/7; TW5 9	35,960	36,648	37,672	38,528
12	TW14 0/8/9	21,671	21,579	21,721	21,746
13	TW13 4/5/6/7	30,327	30,482	30,970	31,291
14	TW3 1/2/3/4; TW5 0	43,684	44,745	45,725	46,745
15	TW7 4/5/6/7	31,149	31,476	31,923	32,310
16	TW8 0/8/9	16,517	16,587	16,685	16,769
17	W4 1/2/3/4/5	42,330	42,398	42,286	42,264
18	SW13 0/8/9; SW14 8; SW15 1/5/6	53,278	55,622	57,932	60,259
19	SW14 7; TW10 6; TW9 1/2/3/4	37,431	40,437	42,684	45,310
20	TW1 1/2/3/4; TW2 5/6/7	57,206	62,132	66,158	70,634
21	TW12 1/2/3; TW16 5	28,031	29,421	30,775	32,147
22	TW15 1/2/3; TW16 7	34,768	35,232	35,835	36,368
23	TW19 7; TW6 1/2/3	10,279	10,556	10,856	11,144
24	UB11 1; UB3 1/4/5	22,914	24,218	25,250	26,418
25	UB3 2/3; UB4 0/8/9	56,676	60,156	62,839	65,920
26	HA1 3; HA2 0/8/9; HA4 0/6	64,006	65,762	67,089	68,630
27	HA0 1/2/4; HA9 6/7; NW10 0/2/3/4/5/7/8/9	110,759	109,724	109,963	109,565
28	W10 4/5/6; W11 12/3/4; W14 8; W2 4/5; W8 4/7; W9 2/3	133,266	153,915	171,288	190,299
29	SW10 0/9; SW3 5/6; SW5 0/9; SW7 2/3/4/5; W8 5/6	85,510	98,208	107,278	118,162
30	SW11 1/2/3/4/5/6; SW15 2; SW18 1/2/3/4/5	126,877	131,550	135,485	139,789
	TOTAL	**1,514,652**	**1,583,497**	**1,643,981**	**1,708,640**

TABLE 1A
POPULATION GROWTH RATES

SURVEY ZONE	2006-2011 (%)	2006-2016 (%)	2006-2021 (%)
1	3	7	10
2	4	8	12
3	4	9	13
4	2	3	5
5	1	1	1
6	1	2	3
7	1	2	2
8	0	1	2
9	2	4	5
10	3	6	10
11	2	5	7
12	0	0	0
13	1	2	3
14	2	5	7
15	1	2	4
16	0	1	2
17	0	0	0
18	4	9	13
19	8	14	21
20	9	16	23
21	5	10	15
22	1	3	5
23	3	6	8
24	6	10	15
25	6	11	16
26	3	5	7
27	-1	-1	-1
28	15	29	43
29	15	25	38
30	4	7	10
TOTAL	5	9	13

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

TABLE 2
CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2005 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods 0.70 %pa 2004-2021

	2004	2004 Minus SFT	2006	2011	2016	2021
ZONE						
1	1,813	1,797	1,822	1,887	1,954	2,023
2	1,846	1,829	1,855	1,921	1,989	2,060
3	1,538	1,524	1,546	1,600	1,657	1,716
4	1,606	1,592	1,614	1,671	1,731	1,792
5	1,904	1,887	1,913	1,981	2,052	2,124
6	1,693	1,678	1,701	1,762	1,824	1,889
7	1,264	1,253	1,270	1,315	1,362	1,410
8	1,433	1,420	1,440	1,491	1,544	1,599
9	1,129	1,119	1,135	1,175	1,217	1,260
10	1,001	992	1,006	1,042	1,079	1,117
11	1,188	1,177	1,194	1,236	1,280	1,326
12	1,490	1,477	1,497	1,550	1,606	1,662
13	1,461	1,448	1,468	1,520	1,574	1,630
14	1,234	1,223	1,240	1,284	1,330	1,377
15	1,592	1,578	1,600	1,657	1,715	1,776
16	1,653	1,638	1,661	1,720	1,781	1,844
17	2,035	2,017	2,045	2,118	2,193	2,271
18	1,884	1,867	1,893	1,960	2,030	2,102
19	2,074	2,055	2,084	2,158	2,235	2,314
20	1,801	1,785	1,810	1,874	1,941	2,010
21	1,784	1,768	1,793	1,856	1,922	1,991
22	1,553	1,539	1,561	1,616	1,673	1,733
23	1,516	1,502	1,523	1,578	1,634	1,692
24	1,270	1,259	1,276	1,322	1,368	1,417
25	1,288	1,276	1,294	1,340	1,388	1,437
26	1,461	1,448	1,468	1,520	1,574	1,630
27	1,284	1,272	1,290	1,336	1,384	1,433
28	1,781	1,765	1,790	1,853	1,919	1,987
29	2,292	2,271	2,303	2,385	2,470	2,557
30	1,823	1,807	1,832	1,897	1,964	2,034

Note Special Forms of trading removed;
Convenience goods 0.9%

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

TABLE 3
SURVEY AREA CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	113,156	121,017	129,372	138,127
2	114,860	124,144	133,032	142,866
3	74,858	80,441	87,346	94,112
4	74,640	78,845	82,787	87,152
5	115,866	120,961	125,376	130,414
6	73,697	77,140	80,544	84,191
7	40,880	42,583	44,503	46,430
8	53,354	55,371	57,877	60,277
9	34,481	36,245	38,307	40,357
10	50,104	53,370	57,173	60,989
11	42,931	45,305	48,224	51,070
12	32,449	33,458	34,873	36,153
13	44,526	46,342	48,755	51,009
14	54,171	57,457	60,799	64,361
15	49,833	52,144	54,761	57,392
16	27,437	28,531	29,718	30,928
17	86,566	89,782	92,723	95,964
18	100,870	109,045	117,605	126,671
19	78,014	87,271	95,390	104,852
20	103,535	116,442	128,388	141,939
21	50,253	54,618	59,159	63,990
22	54,260	56,936	59,966	63,018
23	15,660	16,652	17,734	18,850
24	29,244	32,005	34,554	37,435
25	73,358	80,626	87,211	94,734
26	93,973	99,978	105,616	111,876
27	142,915	146,604	152,138	156,968
28	238,515	285,249	328,714	378,160
29	196,954	234,229	264,943	302,181
30	232,435	249,550	266,137	284,338
TOTAL	**2,493,795**	**2,712,343**	**2,923,727**	**3,156,804**

WEST LONDON RETAIL NEEDS STUDY 2006
EALING BOROUGH COUNCIL

CONVENIENCE GOODS
EALING BOROUGH COUNCIL

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	EALING TOWN CENTRE				HANWELL TOWN CENTRE				SOUTHALL TOWN CENTRE				ACTON TOWN CENTRE				GREENFORD TOWN CENTRE				NEIGHBOURHOOD CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
3	2	2	2	2	1	1	1	1	0	0	0	0	5	5	5	5	0	0	0	0	8	8	8	8	0	0	0	0	15	15	15	15
4	8	8	8	8	0	0	0	0	0	0	0	0	47	47	47	47	0	0	0	0	17	17	17	17	5	5	5	5	77	77	77	77
5	54	54	54	54	1	1	1	1	0	0	0	0	2	2	2	2	2	2	2	2	11	11	11	11	5	5	5	5	76	76	76	76
6	53	53	53	53	7	7	7	7	0	0	0	0	0	0	0	0	6	6	6	6	1	1	1	1	13	13	13	13	80	80	80	80
7	4	4	4	4	0	0	0	0	0	0	0	0	0	0	0	0	12	12	12	12	3	3	3	3	43	43	43	43	62	62	62	62
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9	9	9	9	1	1	1	1	10	10	10	10	20	20	20	20
9	5	5	5	5	0	0	0	0	10	10	10	10	1	1	1	1	30	30	30	30	1	1	1	1	4	4	4	4	50	50	50	50
10	7	7	7	7	0	0	0	0	12	12	12	12	1	1	1	1	8	8	8	8	0	0	0	0	7	7	7	7	35	35	35	35
11	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
16	7	7	7	7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	1	1	1	1	10	10	10	10
17	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	0	0	0	0	3	3	3	3
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2	2	2	2
24	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	4	4	4	4
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	2	2	2	2	3	3	3	3
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1
27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	14	14	14	14	2	2	2	2	17	17	17	17
28	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	4	4	4	0	0	0	0	4	4	4	4
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

TABLE 5
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	EALING TOWN CENTRE				HANWELL TOWN CENTRE				SOUTHALL TOWN CENTRE				ACTON TOWN CENTRE				GREENFORD TOWN CENTRE				NEIGHBOURHOOD CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	1,062	1,148	1,231	1,322	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,062	1,148	1,231	1,322
3	1,273	1,367	1,485	1,600	561	603	655	706	0	0	0	0	3,818	4,102	4,455	4,800	0	0	0	0	5,708	6,134	6,660	7,176	0	0	0	0	11,360	12,207	13,255	14,281
4	6,214	6,564	6,892	7,255	0	0	0	0	0	0	0	0	34,875	36,840	38,682	40,722	0	0	0	0	12,502	13,207	13,867	14,598	3,919	4,139	4,346	4,575	57,510	60,750	63,788	67,151
5	62,742	65,501	67,891	70,619	1,564	1,633	1,693	1,761	0	0	0	0	2,433	2,540	2,633	2,739	2,433	2,540	2,633	2,739	13,064	13,638	14,136	14,704	6,344	6,623	6,864	7,140	88,580	92,475	95,850	99,702
6	38,838	40,653	42,447	44,369	4,956	5,188	5,417	5,662	0	0	0	0	0	0	0	0	4,274	4,474	4,672	4,883	737	771	805	842	9,894	10,356	10,813	11,303	58,699	61,442	64,154	67,058
7	1,472	1,533	1,602	1,671	0	0	0	0	0	0	0	0	0	0	0	0	4,967	5,174	5,407	5,641	1,124	1,171	1,224	1,277	17,640	18,375	19,203	20,034	25,202	26,252	27,436	28,624
8	173	180	188	196	0	0	0	0	173	180	188	196	0	0	0	0	4,602	4,776	4,992	5,199	440	457	477	497	5,402	5,606	5,860	6,103	10,791	11,199	11,706	12,191
9	1,595	1,676	1,772	1,867	0	0	0	0	3,396	3,570	3,773	3,975	284	299	316	333	10,388	10,919	11,540	12,158	284	299	316	333	1,396	1,468	1,551	1,634	17,344	18,231	19,269	20,300
10	3,357	3,576	3,831	4,086	213	227	243	259	6,050	6,444	6,904	7,364	413	440	472	503	3,820	4,069	4,359	4,650	0	0	0	0	3,670	3,909	4,188	4,467	17,524	18,666	19,996	21,331
11	386	408	434	460	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	386	408	434	460
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	163	172	182	193	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	163	172	182	193
15	411	430	452	473	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	411	430	452	473
16	1,831	1,904	1,984	2,064	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	679	706	736	765	288	300	312	325	2,799	2,910	3,031	3,155
17	238	247	255	264	584	606	626	648	0	0	0	0	822	853	881	912	0	0	0	0	1,104	1,145	1,182	1,224	0	0	0	0	2,748	2,851	2,944	3,047
18	0	0	0	0	0	0	0	0	0	0	0	0	353	382	412	443	0	0	0	0	0	0	0	0	0	0	0	0	353	382	412	443
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	266	283	301	320	266	283	301	320
24	351	384	415	449	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	351	384	415	449	351	384	415	449	1,053	1,152	1,244	1,348
25	0	0	0	0	0	0	0	0	275	302	327	355	0	0	0	0	0	0	0	0	605	665	719	782	1,265	1,391	1,504	1,634	2,146	2,358	2,551	2,771
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	705	750	792	839	0	0	0	0	705	750	792	839
27	0	0	0	0	0	0	0	0	0	0	0	0	500	513	532	549	1,679	1,723	1,788	1,844	19,758	20,268	21,033	21,701	2,465	2,529	2,624	2,708	24,403	25,033	25,978	26,802
28	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8,587	10,269	11,834	13,614	0	0	0	0	8,587	10,269	11,834	13,614
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	119,943	125,572	130,877	136,696	7,879	8,257	8,633	9,035	10,058	10,669	11,374	12,084	43,500	45,970	48,383	51,001	32,163	33,675	35,391	37,114	65,648	69,864	74,197	78,801	52,900	55,363	57,983	60,694	332,091	349,369	366,838	385,424

WEST LONDON RETAIL NEEDS STUDY 2006
HAMMERSMITH & FULHAM BOROUGH COUNCIL

CONVENIENCE GOODS
HAMMERSMITH & FULHAM BOROUGH COUNCIL

TABLE 6
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	HAMMERSMITH TOWN CENTRE				FULHAM TOWN CENTRE				SHEPHERD'S BUSH TOWN CENTRE				KEY LOCAL SHOPPING CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1	1	1	1	38	38	38	38	0	0	0	0	1	1	1	1	24	24	24	24	64	64	64	64
2	20	20	20	20	9	9	9	9	4	4	4	4	5	5	5	5	29	29	29	29	66	66	66	66
3	6	6	6	6	0	0	0	0	8	8	8	8	5	5	5	5	17	17	17	17	36	36	36	36
4	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	2	2	2	2
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
18	3	3	3	3	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	6	6	6	6
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
28	2	2	2	2	0	0	0	0	4	4	4	4	0	0	0	0	1	1	1	1	7	7	7	7
29	0	0	0	0	3	3	3	3	0	0	0	0	0	0	0	0	2	2	2	2	5	5	5	5
30	0	0	0	0	2	2	2	2	0	0	0	0	0	0	0	0	1	1	1	1	3	3	3	3

TABLE 7
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	HAMMERSMITH TOWN CENTRE				FULHAM TOWN CENTRE				SHEPHERD'S BUSH TOWN CENTRE				KEY LOCAL SHOPPING CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	1,047	1,119	1,197	1,278	42,999	45,987	49,161	52,488	283	303	323	345	1,358	1,452	1,552	1,658	26,959	28,832	30,823	32,909	72,646	77,693	83,057	88,678
2	22,599	24,425	26,174	28,109	10,280	11,111	11,906	12,786	4,135	4,469	4,789	5,143	5,312	5,742	6,153	6,608	33,223	35,909	38,479	41,324	75,549	81,656	87,502	93,970
3	4,697	5,048	5,481	5,906	0	0	0	0	5,989	6,435	6,988	7,529	3,574	3,841	4,171	4,494	13,025	13,997	15,198	16,375	27,286	29,321	31,838	34,304
4	0	0	0	0	0	0	0	0	243	256	269	283	466	493	517	545	672	710	745	784	1,381	1,459	1,532	1,612
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	121	127	134	141	121	127	134	141
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	163	172	182	193	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	163	172	182	193
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	238	247	255	264	0	0	0	0	238	247	255	264	0	0	0	0	0	0	0	0	476	494	510	528
18	3,051	3,299	3,558	3,832	0	0	0	0	0	0	0	0	0	0	0	0	2,497	2,699	2,911	3,135	5,548	5,997	6,468	6,967
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	163	178	192	208	163	178	192	208
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
28	3,935	4,707	5,424	6,240	0	0	0	0	9,958	11,909	13,724	15,788	0	0	0	0	2,147	2,567	2,958	3,403	16,040	19,183	22,106	25,431
29	0	0	0	0	5,613	6,676	7,551	8,612	0	0	0	0	0	0	0	0	3,250	3,865	4,372	4,986	8,863	10,540	11,922	13,598
30	0	0	0	0	5,462	5,864	6,254	6,682	0	0	0	0	0	0	0	0	1,918	2,059	2,196	2,346	7,380	7,923	8,450	9,028
TOTAL	35,730	39,017	42,270	45,820	64,355	69,637	74,873	80,569	20,845	23,619	26,348	29,353	10,711	11,528	12,393	13,304	83,974	90,941	98,008	105,612	215,615	234,743	253,893	274,658

CONVENIENCE GOODS
HOUNSLOW BOROUGH COUNCIL

TABLE 8
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	HOUNSLOW TOWN CENTRE				CHISWICK TOWN CENTRE				FELTHAM TOWN CENTRE				BRENTFORD TOWN CENTRE				MAJOR NEIGHBOURHOOD CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	7	7	7	7	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	8	8	8	8
3	0	0	0	0	16	16	16	16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	16	16	16	16
4	0	0	0	0	6	6	6	6	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	7	7	7	7
5	0	0	0	0	2	2	2	2	0	0	0	0	1	1	1	1	0	0	0	0	7	7	7	7	10	10	10	10
6	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	8	8	8	8	10	10	10	10
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2	2	2	2
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8	8	8	8	8	8	8	8
10	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	35	35	35	35	37	37	37	37
11	5	5	5	5	0	0	0	0	5	5	5	5	0	0	0	0	14	14	14	14	48	48	48	48	72	72	72	72
12	0	0	0	0	0	0	0	0	17	17	17	17	1	1	1	1	2	2	2	2	51	51	51	51	72	72	72	72
13	0	0	0	0	0	0	0	0	55	55	55	55	0	0	0	0	2	2	2	2	6	6	6	6	63	63	63	63
14	13	13	13	13	0	0	0	0	6	6	6	6	0	0	0	0	4	4	4	4	58	58	58	58	82	82	82	82
15	2	2	2	2	1	1	1	1	0	0	0	0	0	0	0	0	4	4	4	4	78	78	78	78	85	85	85	85
16	0	0	0	0	4	4	4	4	1	1	1	1	38	38	38	38	0	0	0	0	37	37	37	37	80	80	80	80
17	0	0	0	0	77	77	77	77	1	1	1	1	0	0	0	0	0	0	0	0	2	2	2	2	79	79	79	79
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	0	0	0	0	3	3	3	3	5	5	5	5
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	26	26	26	26	26	26	26	26
21	0	0	0	0	0	0	0	0	4	4	4	4	0	0	0	0	0	0	0	0	3	3	3	3	6	6	6	6
22	0	0	0	0	0	0	0	0	3	3	3	3	0	0	0	0	0	0	0	0	1	1	1	1	3	3	3	3
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	43	43	43	43	44	44	44	44
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	11	11	11	11	11	11	11	11
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
28	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

TABLE 9
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	HOUNSLOW TOWN CENTRE				CHISWICK TOWN CENTRE				FELTHAM TOWN CENTRE				BRENTFORD TOWN CENTRE				MAJOR NEIGHBOURHOOD CENTRES				OUT OF CENTRE FOODSTORES				TOTAL			
	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	8,586	9,280	9,944	10,679	0	0	0	0	0	0	0	0	0	0	0	0	1,062	1,148	1,231	1,322	9,648	10,428	11,175	12,001
3	0	0	0	0	11,603	12,468	13,539	14,587	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	11,603	12,468	13,539	14,587
4	0	0	0	0	4,833	5,105	5,360	5,643	0	0	0	0	0	0	0	0	0	0	0	0	672	710	745	784	5,505	5,815	6,106	6,427
5	0	0	0	0	2,346	2,449	2,539	2,641	0	0	0	0	782	816	846	880	0	0	0	0	8,226	8,588	8,902	9,259	11,355	11,854	12,287	12,781
6	0	0	0	0	240	251	262	274	0	0	0	0	848	887	926	968	0	0	0	0	6,098	6,383	6,665	6,967	7,185	7,521	7,853	8,209
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	368	383	401	418	368	383	401	418
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	920	955	998	1,040	920	955	998	1,040
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2,655	2,791	2,950	3,108	2,655	2,791	2,950	3,108
10	626	667	715	762	0	0	0	0	0	0	0	0	0	0	0	0	413	440	472	503	17,637	18,786	20,125	21,468	18,676	19,894	21,311	22,734
11	2,114	2,231	2,375	2,515	193	204	217	230	1,932	2,039	2,170	2,298	193	204	217	230	5,817	6,139	6,534	6,920	20,725	21,871	23,280	24,654	30,975	32,688	34,794	36,847
12	0	0	0	0	0	0	0	0	5,427	5,596	5,833	6,047	479	494	514	533	690	711	741	768	16,654	17,172	17,899	18,555	23,250	23,973	24,987	25,903
13	167	174	183	191	0	0	0	0	24,333	25,326	26,645	27,876	0	0	0	0	846	880	926	969	2,672	2,781	2,925	3,061	28,018	29,161	30,679	32,097
14	6,934	7,354	7,782	8,238	0	0	0	0	3,264	3,462	3,663	3,878	0	0	0	0	2,329	2,471	2,614	2,768	31,677	33,598	35,552	37,635	44,204	46,885	49,612	52,519
15	872	913	958	1,004	411	430	452	473	0	0	0	0	237	248	260	273	1,844	1,929	2,026	2,124	38,957	40,763	42,810	44,867	42,321	44,283	46,506	48,741
16	0	0	0	0	1,125	1,170	1,218	1,268	288	300	312	325	10,426	10,842	11,293	11,753	0	0	0	0	10,165	10,571	11,011	11,459	22,004	22,882	23,834	24,804
17	0	0	0	0	66,547	69,020	71,281	73,773	584	606	626	648	0	0	0	0	0	0	0	0	1,407	1,459	1,507	1,559	68,538	71,085	73,414	75,980
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	819	916	1,002	1,101	0	0	0	0	819	916	1,002	1,101	0	0	0	0	2,457	2,749	3,005	3,303	4,096	4,582	5,008	5,505
20	0	0	0	0	0	0	0	0	466	524	578	639	0	0	0	0	0	0	0	0	26,764	30,100	33,188	36,691	27,230	30,624	33,766	37,330
21	0	0	0	0	0	0	0	0	1,809	1,966	2,130	2,304	0	0	0	0	0	0	0	0	1,395	1,516	1,642	1,776	3,204	3,482	3,771	4,079
22	0	0	0	0	0	0	0	0	1,384	1,452	1,529	1,607	0	0	0	0	0	0	0	0	448	470	495	520	1,831	1,922	2,024	2,127
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	175	192	207	225	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12,692	13,890	14,996	16,247	12,867	14,082	15,204	16,471
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7,739	8,506	9,201	9,994	7,739	8,506	9,201	9,994
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	705	750	792	839	705	750	792	839
27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
28	0	0	0	0	894	1,070	1,233	1,418	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	894	1,070	1,233	1,418
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	10,889	11,531	12,220	12,936	97,598	102,363	107,046	112,087	39,487	41,270	43,485	45,621	13,783	14,407	15,059	15,738	11,939	12,571	13,314	14,052	212,095	225,940	240,318	255,525	385,792	408,082	431,442	455,959

CONVENIENCE GOODS
FLOORSPACE SCHEDULE: EALING BOROUGH COUNCIL

TABLE 10: EALING CONVENIENCE RETAIL PROVISION

	Net Flsp sq m	Net Con Ration (%)	Net Convenience (sq m)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
EALING - TOWN CENTRE FLOORSPACE					
Tesco Express, The Parade	186	95	177	12,435	2,197
Budgens, New Broadway	137	95	130	3,315	431
Budgens, The Station	106	95	101	3,315	334
Sainsburys, Melbourne Avenue	2,079	80	1,663	10,152	16,885
Waitrose, Alexandria Road	1,579	80	1,263	10,565	13,346
M&S, The Broadway	836	95	794	9,641	7,657
Iceland, New Broadway	535	95	508	4,717	2,397
Sainsbury's Local, Ealing Broadway	264	95	251	10,152	2,546
Other	3,986	95	3,787	3,000	11,360
SUB-TOTAL	**9,708**		**8,674**	**6,589**	**57,154**
HANWELL - TOWN CENTRE FLOORSPACE					
Lidl, Uxbridge Road	793	95	753	2,826	2,129
Other	844	95	802	3,000	2,405
SUB-TOTAL	**1,637**		**1,555**	**2,916**	**4,534**
SOUTHALL - TOWN CENTRE FLOORSPACE					
Iceland, South Road	450	95	428	4,717	2,017
Somerfield, The Broadway	513	95	487	5,391	2,627
Other	6,444	95	6,122	3,000	18,365
SUB-TOTAL	**7,407**		**7,037**	**3,270**	**23,009**
ACTON - TOWN CENTRE FLOORSPACE					
Morrisons, King Street	2,494	80	1,995	11,130	22,207
Iceland, The Oaks Shopping Centre	474	95	450	4,717	2,124
Netto, The Oaks Shopping Centre	475	95	451	2,978	1,344
Other	2,655	80	2,124	3,000	6,372
SUB-TOTAL	**6,098**		**5,021**	**6,383**	**32,046**
GREENFORD - TOWN CENTRE FLOORSPACE					
Tesco Metro, Greenford Road	1,161	85	987	12,435	12,271
Other	2,281	95	2,167	3,000	6,501
SUB-TOTAL	**3,442**		**3,154**	**5,952**	**18,772**
PARK ROYAL - TOWN CENTRE FLOORSPACE					
Asda, Western Road	5,413	80	4,330	13,228	57,283
Other	122	95	116	3,000	348
SUB-TOTAL	**5,535**		**4,446**	**12,961**	**57,630**
EAST ACTON - TOWN CENTRE FLOORSPACE					
Other	577	95	548	3,000	1,644
SUB-TOTAL	**577**		**548**	**3,000**	**1,644**
NORTHFIELDS - TOWN CENTRE FLOORSPACE					
NorthfieldsTesco Express, Northfield Ave.	245	95	233	12,435	2,894
Other	812	95	771	3,000	2,314
SUB-TOTAL	**1,057**		**1,004**	**5,187**	**5,208**
PITSHANGER					
Welcome Co-op, 107-109 Pitshanger Lane	128	95	122	5,239	637
Other	543	95	516	3,000	1,548
SUB-TOTAL	**671**		**637**	**3,427**	**2,185**
SOUTH EALING - TOWN CENTRE FLOORSPACE					
Co-Op, The Woodlands, South Ealing Road	274	95	260	5,239	1,364
Sainsbury's Local, South Ealing Road	279	95	265	10,152	2,691
Other	1,000	95	950	3,000	2,850
SUB-TOTAL	**1,553**		**1,475**	**4,680**	**6,904**
NORTHOLT - TOWN CENTRE FLOORSPACE					
Co-op, Church Road	184	95	175	5,239	916
Other	120	95	114	3,000	342
SUB-TOTAL	**304**		**289**	**4,355**	**1,258**
PERIVALE - TOWN CENTRE FLOORSPACE					
Other	406	95	386	3,000	1,157
SUB-TOTAL	**406**		**386**	**3,000**	**1,157**
SUDBURY HILL - TOWN CENTRE FLOORSPACE					
Iceland, Greenford Road	453	95	430	4,717	2,030
Other	277	95	263	3,000	789
SUB-TOTAL	**730**		**694**	**4,065**	**2,819**
WEST WAY CROSS - TOWN CENTRE FLOORSPACE					
Other	0	0	0	3,000	0
SUB-TOTAL	**0**		**0**	**0**	**0**
OUT OF CENTRE FLOORSPACE					
Tesco Express, Ealing Common	234	95	222	12,435	2,764
Tesco, Old Hoover Building	3,471	80	2,777	12,435	34,530
Tesco Express, Church Road, Northolt	225	95	214	12,435	2,658
SUB-TOTAL	**3,930**		**3,213**	**12,435**	**39,952**
TOTAL	**43,055**		**38,133**	**6,668**	**254,274**

Note: Other includes small local stores such as bakers, butchers, Londis, Costcutter and other general convenience stores

CONVENIENCE GOODS
FLOORSPACE SCHEDULE: HAMMERSMITH & FULHAM BOROUGH COUNCIL

TABLE 11

	Net Flsp sq m	Net Con Ration (%)	Net Convenience (sq m)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
HAMMERSMITH - TOWN CENTRE FLOORSPACE					
Iceland, King Street	463	95	440	4,717	2,075
Tesco Metro, Broadway Shopping Centre	664	95	631	12,435	7,844
Sainsbury's, Kings Mall	1,730	80	1,384	10,152	14,050
M&S, King Street	836	95	794	9,641	7,657
Other	51	95	48	3,000	145
SUB-TOTAL	**3,744**		**3,297**	**9,636**	**31,771**
FULHAM - TOWN CENTRE FLOORSPACE					
Somerfield, North End Road	1,013	85	861	5,391	4,642
Sainsbury's Central, Shopping Centre	1,238	85	1,052	10,152	10,683
Sainsbury's, North End Road	163	95	155	10,152	1,572
Waitrose, North End Road	1,635	80	1,308	10,565	13,819
M&S, Jerdan Place	186	95	177	9,641	1,704
Iceland, North End Road	440	95	418	4,717	1,972
Other	967	95	919	3,000	2,756
SUB-TOTAL	**5,642**		**4,890**	**7,597**	**37,147**
SHEPHERD'S BUSH - TOWN CENTRE FLOORSPACE					
Tesco Express, Goldhawk Road	177	95	168	12,435	2,091
Morrisons, West 12 Shopping Centre	2,197	80	1,758	11,130	19,562
M&S, Shepherd's Bush Green	52	95	49	9,641	476
Budgens, Uxbridge Road	94	95	89	3,315	296
Sainsbury's Local, Uxbridge Road	295	95	280	10,152	2,845
Other	1,839	95	1,747	3,000	5,241
SUB-TOTAL	**4,654**		**4,092**	**7,457**	**30,512**
NORTH END RD/WEST KENSINGTON - TOWN CENTRE FLOORSPACE					
Tesco Express, North End Road	186	95	177	12,435	2,197
Other	1,003	95	953	3,000	2,859
SUB-TOTAL	**1,189**		**1,130**	**4,476**	**5,056**
EAST ACTON - TOWN CENTRE FLOORSPACE					
Iceland, Old Oak Common Lane	424				
Other	97	95	92	3,000	276
SUB-TOTAL	**521**		**92**	**3,000**	**276**
BLOEMFONTEIN ROAD - TOWN CENTRE FLOORSPACE					
Other	255	95	242	3,000	727
SUB-TOTAL	**255**		**242**	**3,000**	**727**
UXBRIDGE ROAD WEST - TOWN CENTRE FLOORSPACE					
Other	779	95	740	3,000	2,220
SUB-TOTAL	**779**		**740**	**3,000**	**2,220**
UXBRIDGE ROAD EAST - TOWN CENTRE FLOORSPACE					
Other	1,340	95	1,273	3,000	3,819
SUB-TOTAL	**1,340**		**1,273**	**3,000**	**3,819**
EDWARDS WOODS ESTATE					
Other	358	95	340	3,000	1,020
SUB-TOTAL	**358**		**340**	**3,000**	**1,020**
ASKEW ROAD - TOWN CENTRE FLOORSPACE					
Other	735	95	698	3,000	2,095
SUB-TOTAL	**735**		**698**	**3,000**	**2,095**
GOLDHAWK ROAD - TOWN CENTRE FLOORSPACE					
Other	374	95	355	3,000	1,066
SUB-TOTAL	**374**		**355**	**3,000**	**1,066**
SHEPHERD'S BUSH ROAD - TOWN CENTRE FLOORSPACE					
Other	368	95	350	3,000	1,049
SUB-TOTAL	**368**		**350**	**3,000**	**1,049**
BLYTHE ROAD - TOWN CENTRE FLOORSPACE					
Other	160	95	152	3,000	456
SUB-TOTAL	**160**		**152**	**3,000**	**456**
GREYHOUND ROAD - TOWN CENTRE FLOORSPACE					
Sainsburys, Fulham Palace Road	279	95	265	10,152	2,691
Other	99	95	94	3,000	282
SUB-TOTAL	**378**		**359**	**8,279**	**2,973**
MUNSTER ROAD/FULHAM CROSS - TOWN CENTRE FLOORSPACE					
Budgens	213	95	202	3,315	671
Other	128	95	122	3,000	365
SUB-TOTAL	**341**		**324**	**3,197**	**1,036**
FULHAM PALACE ROAD (CENTRAL) - TOWN CENTRE FLOORSPACE					
Other	191	95	181	3,000	544
SUB-TOTAL	**191**		**181**	**3,000**	**544**
FULHAM HIGH STREET - TOWN CENTRE FLOORSPACE					
Other	175	95	166	3,000	499
SUB-TOTAL	**175**		**166**	**3,000**	**499**
FULHAM ROAD - TOWN CENTRE FLOORSPACE					
Other	296	95	281	3,000	844
SUB-TOTAL	**296**		**281**	**3,000**	**844**
PARSONS GREEN - TOWN CENTRE FLOORSPACE					
Budgens	242	95	230	3,315	762
Other	353	95	335	3,000	1,006
SUB-TOTAL	**595**		**565**	**3,128**	**1,768**
WANDSWORTH BRIDGE ROAD (NORTH) - TOWN CENTRE FLOORSPACE					
Other	214	95	203	3,000	610
SUB-TOTAL	**214**		**203**	**3,000**	**610**
KING STREET WEST - TOWN CENTRE FLOORSPACE					
Tesco Express	200	95	190	12,435	2,363
Other	1,315	95	1,249	3,000	3,748
SUB-TOTAL	**1,515**		**1,439**	**4,246**	**6,110**
DAWES ROAD - TOWN CENTRE FLOORSPACE					
Other	131	95	124	3,000	373
SUB-TOTAL	**131**		**124**	**3,000**	**373**
OUT OF CENTRE FLOORSPACE					
Tesco, 180 Shepherd's Bush Road (near Hammersmith)	2,717	80	2,174	12,435	27,029
Tesco Express, 335/337 Fulham Palace Road	174	95	165	12,435	2,056
M&S Simply Food, Imperial Wharf, Townend Road	200	95	190	9,641	1,832
Tesco Express, Kings Road	197	95	187	12,435	2,327
Sainsburys, Townmead Road (near Fulham)	3,160	80	2,528	10,152	25,664
SUB-TOTAL	**6,448**		**5,244**	**11,233**	**58,907**
TOTAL	**30,403**		**26,539**	**7,192**	**190,879**

CONVENIENCE GOODS
FLOORSPACE SCHEDULE: HOUNSLOW BOROUGH COUNCIL

TABLE 12

	Net Flsp sq m	Net Con Ration (%)	Net Convenience (sq m)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
HOUNSLOW - TOWN CENTRE FLOORSPACE					
M&S, High Street	836	95	794	9,641	7,657
Tesco, High Street	331	95	314	12,435	3,910
Iceland, High Street	297	95	282	4,717	1,331
Other	625	95	594	3,000	1,781
SUB-TOTAL	**2,089**		**1,985**	**7,397**	**14,679**
CHISWICK - TOWN CENTRE FLOORSPACE					
Sainsbury's, Essex Place	3,603	80	2,882	10,152	29,262
Tesco Express, Chiswick High Road	141	95	134	12,435	1,666
Sainsbury's Local, Chiswick High Road	254	95	241	10,152	2,450
M&S Simply Food, Chiswick High Road	836	95	794	9,641	7,657
Other	2,531	95	2,404	3,000	7,213
SUB-TOTAL	**7,365**		**6,456**	**7,473**	**48,248**
FELTHAM - TOWN CENTRE FLOORSPACE					
Asda, Tilley Road	4,840	80	3,872	13,228	51,219
Lidl, Hounslow Roa	836	95	794	2,826	2,244
Tesco, High Street	2,401	80	1,921	12,435	23,885
Aldi, High Street	754	95	716	4,109	2,943
Other	736	95	699	3,000	2,098
SUB-TOTAL	**9,567**		**8,003**	**10,295**	**82,389**
BRENTFORD - TOWN CENTRE FLOORSPACE					
Somerfield, High Street	1,933	80	1,546	5,391	8,337
Other	875	95	831	3,000	2,494
SUB-TOTAL	**2,808**		**2,378**	**4,555**	**10,830**
HOUNSLOW WEST - TOWN CENTRE FLOORSPACE					
Iceland, Bath Road	615	95	584	4,717	2,756
Somerfield, Bath Road	2,055	80	1,644	5,391	8,863
Other	1,634	80	1,307	3,000	3,922
SUB-TOTAL	**4,304**		**3,535**	**4,396**	**15,540**
BEDFONT - TOWN CENTRE FLOORSPACE					
Budgens, Staines Road	502	95	477	3,315	1,581
Other	363	95	345	3,000	1,035
SUB-TOTAL	**865**		**822**	**3,183**	**2,615**
OLD ISLEWORTH - TOWN CENTRE FLOORSPACE					
Other	244	95	232	3,000	695
SUB-TOTAL	**244**		**232**	**3,000**	**695**
HESTON - TOWN CENTRE FLOORSPACE					
Other	330	95	314	3,000	941
SUB-TOTAL	**330**		**314**	**3,000**	**941**
CRANFORD					
Tesco Express, Bath Road	367	**95**	349	**12,435**	4,335
Other	320	95	304	3,000	912
SUB-TOTAL	**687**		**653**	**8,040**	**5,247**
HANWORTH - TOWN CENTRE FLOORSPACE					
Other	351	95	333	3,000	1,000
SUB-TOTAL	**351**		**333**	**3,000**	**1,000**
ISLEWORTH - TOWN CENTRE FLOORSPACE					
Other	711	95	675	3,000	2,026
SUB-TOTAL	**711**		**675**	**3,000**	**2,026**
OUT OF CENTRE FLOORSPACE					
Tesco, Syon Lane, Osterley	4,704	80	3,763	12,435	46,795
Tesco, Dukes Green Avenue	3,680	80	2,944	12,435	36,609
Tesco Extra, Bulls Bridge Industrial Estate Hayes Road, (Southall)	5,415	80	4,332	12,435	53,868
Tesco Extra, Mogden Lane, Twickenham	4,608	80	3,686	1,245	4,590
Tesco Express, London Road, Isleworth	200	95	190	12,435	2,363
Tesco Express, Bear Road, Hanworth	186	95	177	12,435	2,197
Aldi, Hopsital Road	250	95	238	4,109	976
SUB-TOTAL	**19,043**		**15,330**	**9,615**	**147,398**
TOTAL	**48,364**		**40,715**	**8,145**	**331,610**

CONVENIENCE GOODS CAPACITY
GLOBAL CAPACITY

TABLE 13

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	933,498	992,194	1,052,173	1,116,040
Existing Shop Floorspace (sq m net)	105,386	105,386	105,386	105,386
Sales per sq m net £	8,858	7,371	7,371	7,371
Sales from Existing Floorspace (£000)	933,498	776,763	776,763	776,763
Sales from Committed Floorspace (£000)	0	53,801	53,801	53,801
Residual Spending to Support new shops (£000)	0	161,630	221,609	285,477
Sales per sq m net in new shops (£) Based on large store format	12,000	12,000	12,000	12,000
Capacity for new floorspace (sq m net)	0	13,469	18,467	23,790

CONVENIENCE GOODS CAPACITY
CAPACITY BY LONDON BOROUGH

TABLE 14

	EALING BOROUGH				HAMMERSMITH & FULHAM BOROUGH				HOUNSLOW BOROUGH			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Residents Spending (£000)	332,091	349,369	366,838	385,424	215,615	234,743	253,893	274,658	385,792	408,082	431,442	455,959
Existing Shop Floorspace (sq m net)	38,133	38,133	38,133	38,133	26,539	26,539	26,539	26,539	40,715	40,715	40,715	40,715
Sales per sq m net £	8,709	6,668	6,668	6,668	8,124	7,192	7,192	7,192	9,475	8,145	8,145	8,145
Sales from Existing Floorspace (£000)	332,091	254,274	254,274	254,274	215,615	190,879	190,879	190,879	385,792	331,610	331,610	331,610
Sales from Committed Floorspace (£000)	0	3,368	3,368	3,368	0	14,123	14,123	14,123	0	36,309	36,309	36,309
Residual Spending to Support new shops (£000)	0	91,727	109,196	127,782	0	29,741	48,891	69,656	0	40,163	63,523	88,039
Sales per sq m net in new shops (£) Based on large store format	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000
Capacity for new floorspace (sq m net)	0	7,644	9,100	10,648	0	2,478	4,074	5,805	0	3,347	5,294	7,337

CONVENIENCE GOODS CAPACITY
CAPACITY BY MAJOR CENTRE

TABLE 15
LONDON BOROUGH OF EALING

	EALING				HANWELL				SOUTHALL				ACTON				GREENFORD			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Residents Spending (£000)	119,943	125,572	130,877	136,696	7,879	8,257	8,633	9,035	10,058	10,669	11,374	12,084	43,500	45,970	48,383	51,001	32,163	33,675	35,391	37,114
Existing Shop Floorspace (sq m net)	8,674	8,674	8,674	8,674	1,555	1,555	1,555	1,555	7,037	7,037	7,037	7,037	5,021	5,021	5,021	5,021	3,154	3,154	3,154	3,154
Sales per sq m net £	13,828	6,589	6,589	6,589	5,066	2,916	2,916	2,916	1,429	3,270	3,270	3,270	8,664	6,383	6,383	6,383	10,198	5,952	5,952	5,952
Sales from Existing Floorspace (£000)	119,943	57,154	57,154	57,154	7,879	4,534	4,534	4,534	10,058	23,009	23,009	23,009	43,500	32,046	32,046	32,046	32,163	18,772	18,772	18,772
Sales from Committed Floorspace (£000)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3,368	3,368	3,368
Residual Spending to Support new shops (£000)	0	68,418	73,723	79,542	0	3,722	4,099	4,501	0	-12,340	-11,635	-10,925	0	13,924	16,336	18,954	0	11,535	13,251	14,974
Sales per sq m net in new shops (£) Based on large store format	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000
Capacity for new floorspace (sq m net)	0	5,702	6,144	6,628	0	310	342	375	0	-1,028	-970	-910	0	1,160	1,361	1,580	0	961	1,104	1,248

TABLE 16
LONDON BOROUGH OF HAMMERSMITH & FULHAM

	HAMMERSMITH				FULHAM				SHEPHERD'S BUSH			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Residents Spending (£000)	35,730	39,017	42,270	45,820	64,355	69,637	74,873	80,569	20,845	23,619	26,348	29,353
Existing Shop Floorspace (sq m net)	3,297	3,297	3,297	3,297	4,890	4,890	4,890	4,890	4,092	4,092	4,092	4,092
Sales per sq m net £	10,836	9,636	9,636	9,636	13,162	7,597	7,597	7,597	5,094	7,457	7,457	7,457
Sales from Existing Floorspace (£000)	35,730	31,771	31,771	31,771	64,355	37,147	37,147	37,147	20,845	30,512	30,512	30,512
Sales from Committed Floorspace (£000)	0	0	0	0	0	14,123	14,123	14,123	0	0	0	0
Residual Spending to Support new shops (£000)	0	7,246	10,499	14,049	0	18,367	23,602	29,298	0	-6,892	-4,163	-1,159
Sales per sq m net in new shops (£) Based on large store format	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000
Capacity for new floorspace (sq m net)	0	604	875	1,171	0	1,531	1,967	2,442	0	-574	-347	-97

TABLE 17
LONDON BOROUGH OF HOUNSLOW

	HOUNSLOW				CHISWICK				FELTHAM				BRENTFORD			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Residents Spending (£000)	10,889	11,531	12,220	12,936	97,598	102,363	107,046	112,087	39,487	41,270	43,485	45,621	13,783	14,407	15,059	15,738
Existing Shop Floorspace (sq m net)	1,985	1,985	1,985	1,985	6,456	6,456	6,456	6,456	8,003	8,003	8,003	8,003	2,378	2,378	2,378	2,378
Sales per sq m net £	5,487	7,397	7,397	7,397	15,117	7,473	7,473	7,473	4,934	10,295	10,295	10,295	5,797	4,555	4,555	4,555
Sales from Existing Floorspace (£000)	10,889	14,679	14,679	14,679	97,598	48,248	48,248	48,248	39,487	82,389	82,389	82,389	13,783	10,830	10,830	10,830
Sales from Committed Floorspace (£000)	0	35,747	35,747	35,747	0	0	0	0	0	562	562	562	0	0	0	0
Residual Spending to Support new shops (£000)	0	-38,895	-38,206	-37,490	0	54,116	58,799	63,839	0	-41,682	-39,466	-37,331	0	3,576	4,228	4,907
Sales per sq m net in new shops (£) Based on large store format	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000
Capacity for new floorspace (sq m net)	0	-3,241	-3,184	-3,124	0	4,510	4,900	5,320	0	-3,473	-3,289	-3,111	0	298	352	409

APPENDIX 12:

CONVENIENCE GOODS CAPACITY FORECASTS SCENARIO TESTING

CONVENIENCE GOODS CAPACITY FORECASTS
SCENARIO TESTING

NO COMMITMENTS

TABLE 1: GLOBAL CAPACITY
IN THE THREE WEST LONDON AUTHORITIES (SQ M NET)

SCENARIO	WEST LONDON AUTHORITIES					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	50,430	16,810	62,651	20,884	75,547	25,182
0.5% Growth / 0.3% Efficiency	47,251	15,750	55,530	18,510	64,153	21,384
0.7% Growth / 0% Efficiency	53,858	17,953	68,853	22,951	84,819	28,273
0.7% Growth / 0.3% Efficiency	50,628	16,876	61,548	20,516	73,018	24,339

CONVENIENCE GOODS CAPACITY FORECASTS
SCENARIO TESTING
WITH ALL COMMITMENTS

TABLE 2: GLOBAL CAPACITY
IN THE THREE WEST LONDON AUTHORITIES (SQ M NET)

SCENARIO	WEST LONDON AUTHORITIES					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	36,979	12,326	49,201	16,400	62,097	20,699
0.5% Growth / 0.3% Efficiency	33,801	11,267	42,080	14,027	50,703	16,901
0.7% Growth / 0% Efficiency	40,408	13,469	55,402	18,467	71,369	23,790
0.7% Growth / 0.3% Efficiency	37,178	12,393	48,098	16,033	59,568	19,856

CONVENIENCE GOODS CAPACITY FORECASTS
SCENARIO TESTING
NO COMMITMENTS

TABLE 3: CAPACITY BY BOROUGH (SQ M NET)

SCENARIO	EALING BOROUGH COUNCIL						HAMMERSMITH & FULHAM BOROUGH COUNCIL						HOUNSLOW BOROUGH COUNCIL					
	2011		2016		2021		2011		2016		2021		2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	22,567	7,522	25,979	8,660	29,585	9,862	10,155	3,385	14,257	4,752	18,663	6,221	17,708	5,903	22,415	7,472	27,299	9,100
0.5% Growth / 0.3% Efficiency	21,286	7,095	23,336	7,779	25,492	8,497	9,753	3,251	12,886	4,295	16,204	5,401	16,212	5,404	19,307	6,436	22,457	7,486
0.7% Growth / 0% Efficiency	23,774	7,925	28,141	9,380	32,787	10,929	10,966	3,655	15,754	5,251	20,945	6,982	19,118	6,373	24,958	8,319	31,087	10,362
0.7% Growth / 0.3% Efficiency	22,475	7,492	25,434	8,478	28,554	9,518	10,552	3,517	14,338	4,779	18,386	6,129	17,601	5,867	21,775	7,258	26,079	8,693

CONVENIENCE GOODS CAPACITY FORECASTS
SCENARIO TESTING
WITH COMMITMENTS

TABLE 4: CAPACITY BY BOROUGH (SQ M NET)

SCENARIO	EALING BOROUGH COUNCIL						HAMMERSMITH & FULHAM BOROUGH COUNCIL						HOUNSLOW BOROUGH COUNCIL					
	2011		2016		2021		2011		2016		2021		2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	21,725	7,242	25,137	8,379	28,743	9,581	6,624	2,208	10,726	3,575	15,132	5,044	8,631	2,877	13,338	4,446	18,222	6,074
0.5% Growth / 0.3% Efficiency	20,444	6,815	22,494	7,498	24,650	8,217	6,222	2,074	9,355	3,118	12,673	4,224	7,135	2,378	10,230	3,410	13,380	4,460
0.7% Growth / 0% Efficiency	22,932	7,644	27,299	9,100	31,945	10,648	7,435	2,478	12,223	4,074	17,414	5,805	10,041	3,347	15,881	5,294	22,010	7,337
0.7% Growth / 0.3% Efficiency	21,633	7,211	24,593	8,198	27,712	9,237	7,021	2,340	10,808	3,603	14,855	4,952	8,524	2,841	12,698	4,233	17,001	5,667

WEST LONDON RETAIL NEEDS STUDY 2006
EALING/HAMMERSMITH & FULHAM/HOUNSLOW

CONVENIENCE GOODS CAPACITY FORECASTS
SCENARIO TESTING
NO COMMITMENTS

TABLE 5: CAPACITY BY CENTRE, EALING BOROUGH COUNCIL (SQ M NET)

SCENARIO	EALING TOWN CENTRE						HANWELL TOWN CENTRE						SOUTHALL TOWN CENTRE						ACTON TOWN CENTRE						GREENFORD TOWN CENTRE					
	2011		2016		2021		2011		2016		2021		2011		2016		2021		2011		2016		2021		2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	16,671	5,557	17,660	5,887	18,750	6,250	902	301	974	325	1,050	350	-3,122	-1,041	-2,976	-992	-2,832	-944	3,322	1,107	3,799	1,266	4,315	1,438	3,609	1,203	3,946	1,315	4,277	1,426
0.5% Growth / 0.3% Efficiency	16,210	5,403	16,717	5,572	17,298	5,766	872	291	912	304	954	318	-3,161	-1,054	-3,058	-1,019	-2,960	-987	3,154	1,051	3,450	1,150	3,773	1,258	3,486	1,162	3,691	1,230	3,883	1,294
0.7% Growth / 0% Efficiency	17,105	5,702	18,431	6,144	19,885	6,628	931	310	1,025	342	1,125	375	-3,085	-1,028	-2,909	-970	-2,731	-910	3,481	1,160	4,084	1,361	4,739	1,580	3,726	1,242	4,155	1,385	4,585	1,528
0.7% Growth / 0.3% Efficiency	16,638	5,546	17,465	5,822	18,384	6,128	900	300	961	320	1,026	342	-3,125	-1,042	-2,993	-998	-2,864	-955	3,310	1,103	3,727	1,242	4,178	1,393	3,600	1,200	3,893	1,298	4,178	1,393

TABLE 6: CAPACITY BY CENTRE, HAMMERSMITH & FULHAM BOROUGH COUNCIL (SQ M NET)

SCENARIO	HAMMERSMITH TOWN CENTRE						FULHAM TOWN CENTRE						SHEPHERDS BUSH TOWN CENTRE					
	2011		2016		2021		2011		2016		2021		2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	1,677	559	2,376	792	3,132	1,044	7,882	2,627	8,990	2,997	10,186	3,395	-1,805	-602	-1,196	-399	-534	-178
0.5% Growth / 0.3% Efficiency	1,534	511	2,071	690	2,645	882	7,627	2,542	8,451	2,817	9,330	3,110	-1,891	-630	-1,386	-462	-845	-282
0.7% Growth / 0% Efficiency	1,811	604	2,625	875	3,512	1,171	8,123	2,708	9,431	3,144	10,855	3,618	-1,723	-574	-1,041	-347	-290	-97
0.7% Growth / 0.3% Efficiency	1,666	555	2,313	771	3,009	1,003	7,864	2,621	8,879	2,960	9,970	3,323	-1,811	-604	-1,235	-412	-612	-204

TABLE 7: CAPACITY BY CENTRE, HOUNSLOW BOROUGH COUNCIL (SQ M NET)

SCENARIO	HOUNSLOW TOWN CENTRE						CHISWICK TOWN CENTRE						FELTHAM TOWN CENTRE						BRENTFORD TOWN CENTRE					
	2011		2016		2021		2011		2016		2021		2011		2016		2021		2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	-827	-276	-687	-229	-543	-181	13,175	4,392	14,069	4,690	15,029	5,010	-10,422	-3,474	-9,982	-3,327	-9,571	-3,190	844	281	968	323	1,096	365
0.5% Growth / 0.3% Efficiency	-869	-290	-775	-258	-681	-227	12,800	4,267	13,298	4,433	13,838	4,613	-10,574	-3,525	-10,296	-3,432	-10,056	-3,352	792	264	860	287	929	310
0.7% Growth / 0% Efficiency	-787	-262	-615	-205	-436	-145	13,529	4,510	14,700	4,900	15,960	5,320	-10,280	-3,427	-9,726	-3,242	-9,192	-3,064	894	298	1,057	352	1,227	409
0.7% Growth / 0.3% Efficiency	-830	-277	-705	-235	-578	-193	13,148	4,383	13,910	4,637	14,729	4,910	-10,433	-3,478	-10,047	-3,349	-9,693	-3,231	841	280	946	315	1,054	351

CONVENIENCE GOODS CAPACITY FORECASTS
SCENARIO TESTING
WITH COMMITMENTS

TABLE 8: CAPACITY BY CENTRE, EALING BOROUGH COUNCIL (SQ M NET)

SCENARIO	EALING TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	16,671	5,557	17,660	5,887	18,750	6,250
0.5% Growth / 0.3% Efficiency	16,210	5,403	16,717	5,572	17,298	5,766
0.7% Growth / 0% Efficiency	17,105	5,702	18,431	6,144	19,885	6,628
0.7% Growth / 0.3% Efficiency	16,638	5,546	17,465	5,822	18,384	6,128

SCENARIO	HANWELL TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	902	301	974	325	1,050	350
0.5% Growth / 0.3% Efficiency	872	291	912	304	954	318
0.7% Growth / 0% Efficiency	931	310	1,025	342	1,125	375
0.7% Growth / 0.3% Efficiency	900	300	961	320	1,026	342

SCENARIO	SOUTHALL TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	-3,122	-1,041	-2,976	-992	-2,832	-944
0.5% Growth / 0.3% Efficiency	-3,161	-1,054	-3,058	-1,019	-2,960	-987
0.7% Growth / 0% Efficiency	-3,085	-1,028	-2,909	-970	-2,731	-910
0.7% Growth / 0.3% Efficiency	-3,125	-1,042	-2,993	-998	-2,864	-955

SCENARIO	ACTON TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	3,322	1,107	3,799	1,266	4,315	1,438
0.5% Growth / 0.3% Efficiency	3,154	1,051	3,450	1,150	3,773	1,258
0.7% Growth / 0% Efficiency	3,481	1,160	4,084	1,361	4,739	1,580
0.7% Growth / 0.3% Efficiency	3,310	1,103	3,727	1,242	4,178	1,393

SCENARIO	GREENFORD TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	2,767	922	3,104	1,035	3,435	1,145
0.5% Growth / 0.3% Efficiency	2,644	881	2,849	950	3,041	1,014
0.7% Growth / 0% Efficiency	2,884	961	3,313	1,104	3,744	1,248
0.7% Growth / 0.3% Efficiency	2,759	920	3,052	1,017	3,336	1,112

TABLE 9: CAPACITY BY CENTRE, HAMMERSMITH & FULHAM BOROUGH COUNCIL (SQ M NET)

SCENARIO	HAMMERSMITH TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	1,677	559	2,376	792	3,132	1,044
0.5% Growth / 0.3% Efficiency	1,534	511	2,071	690	2,645	882
0.7% Growth / 0% Efficiency	1,811	604	2,625	875	3,512	1,171
0.7% Growth / 0.3% Efficiency	1,666	555	2,313	771	3,009	1,003

SCENARIO	FULHAM TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	4,351	1,450	5,459	1,820	6,655	2,218
0.5% Growth / 0.3% Efficiency	4,096	1,365	4,920	1,640	5,800	1,933
0.7% Growth / 0% Efficiency	4,592	1,531	5,901	1,967	7,325	2,442
0.7% Growth / 0.3% Efficiency	4,333	1,444	5,348	1,783	6,440	2,147

SCENARIO	SHEPHERDS BUSH TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	-1,805	-602	-1,196	-399	-534	-178
0.5% Growth / 0.3% Efficiency	-1,891	-630	-1,386	-462	-845	-282
0.7% Growth / 0% Efficiency	-1,723	-574	-1,041	-347	-290	-97
0.7% Growth / 0.3% Efficiency	-1,811	-604	-1,235	-412	-612	-204

TABLE 10: CAPACITY BY CENTRE, HOUNSLOW BOROUGH COUNCIL (SQ M NET)

SCENARIO	HOUNSLOW TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	-9,764	-3,255	-9,624	-3,208	-9,480	-3,160
0.5% Growth / 0.3% Efficiency	-9,806	-3,269	-9,712	-3,237	-9,617	-3,206
0.7% Growth / 0% Efficiency	-9,724	-3,241	-9,552	-3,184	-9,373	-3,124
0.7% Growth / 0.3% Efficiency	-9,767	-3,256	-9,642	-3,214	-9,515	-3,172

SCENARIO	CHISWICK TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	13,175	4,392	14,069	4,690	15,029	5,010
0.5% Growth / 0.3% Efficiency	12,800	4,267	13,298	4,433	13,838	4,613
0.7% Growth / 0% Efficiency	13,529	4,510	14,700	4,900	15,960	5,320
0.7% Growth / 0.3% Efficiency	13,148	4,383	13,910	4,637	14,729	4,910

SCENARIO	FELTHAM TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	-10,563	-3,521	-10,123	-3,374	-9,712	-3,237
0.5% Growth / 0.3% Efficiency	-10,714	-3,571	-10,436	-3,479	-10,196	-3,399
0.7% Growth / 0% Efficiency	-10,420	-3,473	-9,867	-3,289	-9,333	-3,111
0.7% Growth / 0.3% Efficiency	-10,574	-3,525	-10,187	-3,396	-9,834	-3,278

SCENARIO	BRENTFORD TOWN CENTRE					
	2011		2016		2021	
	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net	£4,000 per sq m net	£12,000 per sq m net
0.5% Growth / 0% Efficiency	844	281	968	323	1,096	365
0.5% Growth / 0.3% Efficiency	792	264	860	287	929	310
0.7% Growth / 0% Efficiency	894	298	1,057	352	1,227	409
0.7% Growth / 0.3% Efficiency	841	280	946	315	1,054	351

APPENDIX 13:

COMPARISON GOODS CAPACITY FORECASTS

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

TABLE 1
POPULATION PROJECTIONS

SURVEY ZONE	POSTCODE SECTOR GROUPING	2006	2011	2016	2021
1	SW6 1/2/3/4/5/6/7	62,108	64,146	66,224	68,282
2	W14 0/9; W6 0/7/8/9	61,916	64,627	66,880	69,362
3	NW10 6; W12 0/7/8/9	48,434	50,262	52,706	54,842
4	W3 0/6/7/8/9	46,248	47,179	47,840	48,636
5	W13 9; W5 1/2/3/4/5	60,556	61,052	61,111	61,388
6	W13 0/8; W7 1/2/3	43,317	43,787	44,152	44,569
7	UB6 0/7/8	32,183	32,375	32,675	32,921
8	UB5 4/5/6	37,050	37,133	37,483	37,699
9	UB1 2; UB6 9	30,392	30,851	31,489	32,037
10	UB1 1/3; UB2 4/5	49,809	51,237	53,007	54,606
11	TW4 5/6/7; TW5 9	35,960	36,648	37,672	38,528
12	TW14 0/8/9	21,671	21,579	21,721	21,746
13	TW13 4/5/6/7	30,327	30,482	30,970	31,291
14	TW3 1/2/3/4; TW5 0	43,684	44,745	45,725	46,745
15	TW7 4/5/6/7	31,149	31,476	31,923	32,310
16	TW8 0/8/9	16,517	16,587	16,685	16,769
17	W4 1/2/3/4/5	42,330	42,398	42,286	42,264
18	SW13 0/8/9; SW14 8; SW15 1/5/6	53,278	55,622	57,932	60,259
19	SW14 7; TW10 6; TW9 1/2/3/4	37,431	40,437	42,684	45,310
20	TW1 1/2/3/4; TW2 5/6/7	57,206	62,132	66,158	70,634
21	TW12 1/2/3; TW16 5	28,031	29,421	30,775	32,147
22	TW15 1/2/3; TW16 7	34,768	35,232	35,835	36,368
23	TW19 7; TW6 1/2/3	10,279	10,556	10,856	11,144
24	UB11 1; UB3 1/4/5	22,914	24,218	25,250	26,418
25	UB3 2/3; UB4 0/8/9	56,676	60,156	62,839	65,920
26	HA1 3; HA2 0/8/9; HA4 0/6	64,006	65,762	67,089	68,630
27	HA0 1/2/4; HA9 6/7; NW10 0/2/3/4/5/7/8/9	110,759	109,724	109,963	109,565
28	W10 4/5/6; W11 12/3/4; W14 8; W2 4/5; W8 4/7; W9 2/3	133,266	153,915	171,288	190,299
29	SW10 0/9; SW3 5/6; SW5 0/9; SW7 2/3/4/5; W8 5/6	85,510	98,208	107,278	118,162
30	SW11 1/2/3/4/5/6; SW15 2; SW18 1/2/3/4/5	126,877	131,550	135,485	139,789
	TOTAL	**1,514,652**	**1,583,497**	**1,643,981**	**1,708,640**

TABLE 1A
POPULATION GROWTH RATES

SURVEY ZONE	2006-2011 (%)	2006-2016 (%)	2006-2021 (%)
1	3	7	10
2	4	8	12
3	4	9	13
4	2	3	5
5	1	1	1
6	1	2	3
7	1	2	2
8	0	1	2
9	2	4	5
10	3	6	10
11	2	5	7
12	0	0	0
13	1	2	3
14	2	5	7
15	1	2	4
16	0	1	2
17	0	0	0
18	4	9	13
19	8	14	21
20	9	16	23
21	5	10	15
22	1	3	5
23	3	6	8
24	6	10	15
25	6	11	16
26	3	5	7
27	-1	-1	-1
28	15	29	43
29	15	25	38
30	4	7	10
TOTAL	5	9	13

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2005 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Comparison Goods 4.30 %pa 2004-2021

ZONE	2004	2004 Minus SFT	2006	2011	2016	2021
1	3,972	3,674	3,997	4,933	6,089	7,516
2	3,999	3,699	4,024	4,967	6,131	7,567
3	3,296	3,049	3,317	4,094	5,053	6,237
4	3,477	3,216	3,499	4,319	5,330	6,579
5	4,178	3,865	4,204	5,189	6,405	7,906
6	3,600	3,330	3,623	4,471	5,519	6,812
7	2,428	2,246	2,443	3,016	3,722	4,594
8	2,618	2,422	2,634	3,252	4,013	4,954
9	2,226	2,059	2,240	2,765	3,413	4,212
10	2,064	1,909	2,077	2,564	3,164	3,906
11	2,270	2,100	2,284	2,819	3,480	4,295
12	2,778	2,570	2,795	3,450	4,259	5,257
13	2,783	2,574	2,800	3,457	4,266	5,266
14	2,365	2,188	2,380	2,937	3,626	4,475
15	3,287	3,040	3,308	4,083	5,039	6,220
16	3,343	3,092	3,364	4,152	5,125	6,326
17	4,575	4,232	4,604	5,682	7,014	8,657
18	4,076	3,770	4,102	5,063	6,249	7,713
19	4,497	4,160	4,525	5,585	6,894	8,509
20	3,864	3,574	3,888	4,799	5,924	7,312
21	3,750	3,469	3,773	4,658	5,749	7,096
22	3,112	2,879	3,131	3,865	4,771	5,889
23	2,959	2,737	2,978	3,675	4,536	5,599
24	2,414	2,233	2,429	2,998	3,701	4,568
25	2,428	2,246	2,443	3,016	3,722	4,594
26	2,875	2,659	2,893	3,571	4,407	5,440
27	2,436	2,253	2,451	3,026	3,734	4,609
28	3,882	3,591	3,906	4,822	5,951	7,346
29	4,895	4,528	4,926	6,080	7,504	9,262
30	3,494	3,232	3,516	4,340	5,356	6,611

Note: Special Forms of trading removed;
Comparison goods 7.5%

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

TABLE 3
SURVEY AREA COMPARIOSN GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	248,237	316,454	403,253	513,204
2	249,152	320,994	410,016	524,865
3	160,638	205,759	266,318	342,039
4	161,811	203,744	255,005	319,991
5	254,587	316,811	391,418	485,319
6	156,917	195,785	243,672	303,606
7	78,630	97,632	121,624	151,250
8	97,604	120,743	150,438	186,756
9	68,076	85,296	107,458	134,944
10	103,449	131,349	167,724	213,268
11	82,140	103,326	131,099	165,492
12	60,579	74,455	92,505	114,311
13	84,928	105,363	132,132	164,781
14	103,959	131,434	165,782	209,190
15	103,028	128,502	160,863	200,961
16	55,562	68,871	85,510	106,076
17	194,872	240,918	296,580	365,878
18	218,521	281,587	361,998	464,762
19	169,381	225,857	294,267	385,560
20	222,428	298,184	391,898	516,447
21	105,774	137,032	176,922	228,111
22	108,875	136,179	170,962	214,158
23	30,606	38,795	49,246	62,397
24	55,661	72,612	93,444	120,674
25	138,471	181,409	233,901	302,859
26	185,169	234,825	295,694	373,359
27	271,498	331,979	410,655	505,038
28	520,577	742,110	1,019,380	1,397,871
29	421,192	597,079	805,039	1,094,474
30	446,083	570,881	725,717	924,210
TOTAL	**5,158,407**	**6,695,964**	**8,610,521**	**11,091,852**

COMPARISON GOODS ASSESSMENT: BASELINE
ASSUMING NO NEW DEVELOPMENT
EALING BOROUGH COUNCIL

TABLE 4
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	EALING TOWN CENTRE				SOUTHALL TOWN CENTRE				ACTON TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0	1	1	1	1
2	0	0	0	0	0	0	0	0	0	0	0	0
3	4	4	4	4	0	0	0	0	2	2	2	2
4	40	40	40	40	0	0	0	0	5	5	5	5
5	53	53	53	53	0	0	0	0	1	1	1	1
6	46	46	46	46	1	1	1	1	0	0	0	0
7	21	21	21	21	0	0	0	0	0	0	0	0
8	9	9	9	9	1	1	1	1	0	0	0	0
9	19	19	19	19	7	7	7	7	0	0	0	0
10	17	17	17	17	6	6	6	6	0	0	0	0
11	1	1	1	1	1	1	1	1	0	0	0	0
12	0	0	0	0	4	4	4	4	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	2	2	2	2	1	1	1	1	0	0	0	0
15	2	2	2	2	1	1	1	1	0	0	0	0
16	18	18	18	18	0	0	0	0	0	0	0	0
17	2	2	2	2	0	0	0	0	1	1	1	1
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0
24	1	1	1	1	2	2	2	2	0	0	0	0
25	1	1	1	1	2	2	2	2	0	0	0	0
26	0	0	0	0	0	0	0	0	0	0	0	0
27	4	4	4	4	0	0	0	0	1	1	1	1
28	0	0	0	0	0	0	0	0	1	1	1	1
29	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0

	HANWELL TOWN CENTRE				GREENFORD TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
2	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
3	0	0	0	0	0	0	0	0	6	6	6	6	12	12	12	12
4	0	0	0	0	1	1	1	1	4	4	4	4	50	50	50	50
5	0	0	0	0	0	0	0	0	2	2	2	2	56	56	56	56
6	2	2	2	2	1	1	1	1	2	2	2	2	52	52	52	52
7	0	0	0	0	5	5	5	5	1	1	1	1	28	28	28	28
8	0	0	0	0	4	4	4	4	0	0	0	0	15	15	15	15
9	0	0	0	0	10	10	10	10	2	2	2	2	37	37	37	37
10	0	0	0	0	1	1	1	1	2	2	2	2	26	26	26	26
11	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2
12	0	0	0	0	0	0	0	0	0	0	0	0	4	4	4	4
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	3	3	3	3
15	0	0	0	0	0	0	0	0	0	0	0	0	3	3	3	3
16	1	1	1	1	0	0	0	0	0	0	0	0	19	19	19	19
17	0	0	0	0	0	0	0	0	0	0	0	0	5	5	5	5
18	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	0	0	0	0	1	1	1	1	0	0	0	0	5	5	5	5
25	0	0	0	0	1	1	1	1	0	0	0	0	5	5	5	5
26	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
27	0	0	0	0	0	0	0	0	1	1	1	1	6	6	6	6
28	0	0	0	0	0	0	0	0	2	2	2	2	3	3	3	3
29	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: West London Household Telephone Survey, 2006

TABLE 5
COMPARISON GOODS ALLOCATION - SPEND (£) 2005 PRICES

	EALING TOWN CENTRE				SOUTHALL TOWN CENTRE				ACTON TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	0	0	0	0	1,701	2,169	2,764	3,517
2	714	920	1,176	1,505	0	0	0	0	973	1,253	1,601	2,050
3	5,973	7,650	9,902	12,717	671	859	1,112	1,428	3,276	4,197	5,432	6,976
4	64,318	80,986	101,362	127,192	528	665	833	1,045	8,210	10,338	12,939	16,237
5	134,102	166,878	206,177	255,638	548	682	843	1,045	1,813	2,257	2,788	3,457
6	72,282	90,186	112,245	139,852	991	1,236	1,538	1,916	0	0	0	0
7	16,847	20,918	26,058	32,406	66	82	102	127	343	426	531	660
8	9,268	11,466	14,286	17,734	1,185	1,466	1,826	2,267	327	404	503	625
9	12,645	15,843	19,960	25,065	4,500	5,638	7,103	8,920	0	0	0	0
10	17,111	21,726	27,742	35,275	5,719	7,262	9,273	11,791	400	508	649	825
11	765	962	1,221	1,541	944	1,187	1,507	1,902	0	0	0	0
12	0	0	0	0	2,365	2,907	3,612	4,463	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	1,578	1,994	2,516	3,174	964	1,219	1,538	1,941	0	0	0	0
15	1,595	1,989	2,490	3,111	791	986	1,235	1,542	0	0	0	0
16	10,179	12,618	15,666	19,434	0	0	0	0	0	0	0	0
17	4,767	5,893	7,255	8,950	394	487	599	739	2,744	3,392	4,176	5,151
18	0	0	0	0	0	0	0	0	456	588	756	970
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	28	35	45	57	0	0	0	0
24	654	854	1,099	1,419	1,027	1,339	1,724	2,226	0	0	0	0
25	1,834	2,402	3,097	4,011	3,363	4,405	5,680	7,355	0	0	0	0
26	827	1,049	1,321	1,668	0	0	0	0	0	0	0	0
27	10,207	12,481	15,438	18,987	585	715	885	1,088	2,493	3,049	3,771	4,638
28	1,402	1,999	2,745	3,765	0	0	0	0	5,095	7,264	9,977	13,682
29	968	1,372	1,849	2,514	964	1,367	1,843	2,505	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0
Total	368,036	460,187	573,605	715,961	25,633	32,539	41,297	52,358	27,833	35,845	45,887	58,789

	HANWELL TOWN CENTRE				GREENFORD TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	1,701	2,169	2,764	3,517
2	0	0	0	0	0	0	0	0	1,608	2,072	2,647	3,388	3,296	4,246	5,423	6,943
3	0	0	0	0	0	0	0	0	9,878	12,653	16,377	21,033	19,798	25,359	32,822	42,154
4	0	0	0	0	1,235	1,556	1,947	2,443	6,446	8,116	10,158	12,747	80,738	101,661	127,239	159,664
5	0	0	0	0	751	934	1,154	1,431	6,060	7,541	9,317	11,552	143,274	178,292	220,279	273,123
6	2,987	3,726	4,638	5,779	2,119	2,644	3,291	4,100	3,683	4,595	5,719	7,126	82,062	102,388	127,431	158,774
7	222	276	344	428	3,729	4,631	5,769	7,174	950	1,180	1,470	1,828	22,158	27,513	34,274	42,623
8	175	216	269	334	3,544	4,385	5,463	6,782	235	291	362	450	14,734	18,227	22,710	28,192
9	0	0	0	0	6,894	8,637	10,881	13,665	1,035	1,297	1,633	2,051	25,073	31,415	39,578	49,701
10	0	0	0	0	1,138	1,444	1,844	2,345	2,146	2,724	3,479	4,423	26,513	33,664	42,987	54,659
11	0	0	0	0	92	116	147	186	150	189	240	302	1,951	2,455	3,114	3,931
12	153	188	234	289	0	0	0	0	77	94	117	144	2,595	3,189	3,962	4,896
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	80	101	128	162	80	101	128	162	404	511	645	814	3,107	3,928	4,955	6,252
15	94	117	147	183	0	0	0	0	358	446	558	698	2,837	3,539	4,430	5,534
16	347	430	535	663	0	0	0	0	62	77	96	119	10,589	13,126	16,297	20,216
17	302	374	460	568	0	0	0	0	588	727	895	1,104	8,795	10,873	13,385	16,513
18	0	0	0	0	0	0	0	0	1,088	1,401	1,802	2,313	1,544	1,989	2,558	3,284
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	290	375	484	625	290	375	484	625
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	28	35	45	57
24	0	0	0	0	598	780	1,004	1,297	227	297	382	493	2,507	3,270	4,208	5,434
25	0	0	0	0	1,217	1,595	2,056	2,663	217	284	366	474	6,631	8,687	11,200	14,502
26	399	506	637	804	686	870	1,096	1,384	312	396	498	629	2,224	2,821	3,552	4,485
27	0	0	0	0	0	0	0	0	2,195	2,684	3,320	4,083	15,480	18,929	23,414	28,796
28	0	0	0	0	0	0	0	0	8,369	11,930	16,387	22,472	14,866	21,192	29,110	39,919
29	0	0	0	0	0	0	0	0	473	671	904	1,229	2,405	3,409	4,596	6,249
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	4,760	5,936	7,391	9,209	22,084	27,693	34,781	43,630	46,850	60,551	77,857	100,098	495,196	622,751	780,819	980,046

WEST LONDON RETAIL NEEDS STUDY 2006
EALING/HAMMERSMITH & FULHAM/HOUNSLOW

COMPARISON GOODS ASSESSMENT: BASELINE
ASSUMING NO NEW DEVELOPMENT
HAMMERSMITH & FULHAM BOROUGH COUNCIL

TABLE 6
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	HAMMERSMITH TOWN CENTRE				FULHAM TOWN CENTRE				SHEPHERDS BUSH TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	6	6	6	6	21	21	21	21	0	0	0	0	1	1	1	1	27	27	27	27
2	27	27	27	27	3	3	3	3	3	3	3	3	0	0	0	0	33	33	33	33
3	22	22	22	22	1	1	1	1	9	9	9	9	0	0	0	0	32	32	32	32
4	3	3	3	3	0	0	0	0	1	1	1	1	0	0	0	0	4	4	4	4
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
7	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
12	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
17	7	7	7	7	1	1	1	1	0	0	0	0	0	0	0	0	8	8	8	8
18	4	4	4	4	0	0	0	0	0	0	0	0	0	0	0	0	5	5	5	5
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
28	5	5	5	5	1	1	1	1	6	6	6	6	0	0	0	0	12	12	12	12
29	0	0	0	0	2	2	2	2	0	0	0	0	0	0	0	0	3	3	3	3
30	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	1	1	1	1

SOURCE: West London Household Telephone Survey, 2006

TABLE 7
COMPARISON GOODS ALLOCATION - SPEND (£) 2005 PRICES

	HAMMERSMITH TOWN CENTRE				FULHAM TOWN CENTRE				SHEPHERDS BUSH TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	13,758	17,538	22,349	28,442	51,358	65,472	83,430	106,178	783	998	1,272	1,619	3,230	4,117	5,247	6,677	69,129	88,125	112,297	142,916
2	67,444	86,891	110,989	142,078	6,582	8,480	10,832	13,867	8,128	10,472	13,377	17,123	714	920	1,176	1,505	82,869	106,765	136,374	174,573
3	35,332	45,257	58,577	75,231	1,782	2,283	2,955	3,795	14,818	18,980	24,566	31,551	0	0	0	0	51,933	66,520	86,098	110,578
4	4,213	5,305	6,640	8,332	0	0	0	0	1,672	2,106	2,636	3,307	0	0	0	0	5,886	7,411	9,275	11,639
5	1,271	1,582	1,954	2,423	0	0	0	0	0	0	0	0	0	0	0	0	1,271	1,582	1,954	2,423
6	947	1,181	1,470	1,832	0	0	0	0	0	0	0	0	281	350	436	543	1,228	1,532	1,906	2,375
7	489	607	756	940	0	0	0	0	0	0	0	0	0	0	0	0	489	607	756	940
8	0	0	0	0	0	0	0	0	153	189	236	292	0	0	0	0	153	189	236	292
9	0	0	0	0	0	0	0	0	0	0	0	0	107	134	168	211	107	134	168	211
10	0	0	0	0	0	0	0	0	303	385	491	624	0	0	0	0	303	385	491	624
11	798	1,004	1,274	1,608	0	0	0	0	189	237	301	380	210	264	335	423	1,197	1,506	1,910	2,411
12	394	484	601	743	137	169	210	259	0	0	0	0	137	169	210	259	668	822	1,021	1,261
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	80	101	128	162	0	0	0	0	0	0	0	0	80	101	128	162
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	701	868	1,078	1,338	0	0	0	0	0	0	0	0	0	0	0	0	701	868	1,078	1,338
17	13,486	16,672	20,524	25,320	1,239	1,532	1,886	2,327	669	827	1,018	1,256	0	0	0	0	15,394	19,031	23,428	28,903
18	8,634	11,126	14,303	18,364	900	1,159	1,490	1,913	630	812	1,044	1,341	887	1,143	1,469	1,886	11,051	14,240	18,307	23,504
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	468	628	825	1,088	0	0	0	0	0	0	0	0	468	628	825	1,088
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	92	115	144	180	0	0	0	0	0	0	0	0	0	0	0	0	92	115	144	180
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	0	0	0	0	0	0	0	0	0	0	0	0	283	370	476	614	283	370	476	614
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26	452	573	722	911	0	0	0	0	0	0	0	0	0	0	0	0	452	573	722	911
27	0	0	0	0	871	1,065	1,317	1,620	855	1,045	1,293	1,590	0	0	0	0	1,725	2,110	2,610	3,209
28	24,488	34,908	47,951	65,755	3,832	5,463	7,504	10,290	33,400	47,614	65,404	89,688	2,069	2,950	4,052	5,557	63,790	90,935	124,911	171,290
29	1,215	1,723	2,323	3,158	9,725	13,787	18,588	25,271	0	0	0	0	0	0	0	0	10,941	15,509	20,911	28,429
30	0	0	0	0	4,418	5,655	7,188	9,154	0	0	0	0	5,662	7,247	9,212	11,732	10,081	12,901	16,400	20,886
Total	173,713	225,835	291,655	376,655	81,395	105,794	136,354	175,924	61,601	83,666	111,638	148,773	13,581	17,664	22,780	29,408	330,289	432,958	562,427	730,759

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

COMPARISON GOODS ASSESSMENT: BASELINE
ASSUMING NO NEW DEVELOPMENT
HOUNSLOW BOROUGH COUNCIL

TABLE 8
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	HOUNSLOW TOWN CENTRE				FELTHAM TOWN CENTRE				CHISWICK TOWN CENTRE				BRENTFORD TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	1	1	1	1
2	0	0	0	0	0	0	0	0	4	4	4	4	0	0	0	0	0	0	0	0	5	5	5	5
3	1	1	1	1	0	0	0	0	6	6	6	6	0	0	0	0	1	1	1	1	8	8	8	8
4	1	1	1	1	0	0	0	0	5	5	5	5	1	1	1	1	2	2	2	2	9	9	9	9
5	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	2	2	2	2	5	5	5	5
6	1	1	1	1	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	3	3	3	3
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	2	2	2	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2
9	3	3	3	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	4	4	4
10	21	21	21	21	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	23	23	23	23
11	41	41	41	41	1	1	1	1	2	2	2	2	1	1	1	1	7	7	7	7	52	52	52	52
12	21	21	21	21	18	18	18	18	0	0	0	0	1	1	1	1	10	10	10	10	49	49	49	49
13	17	17	17	17	11	11	11	11	0	0	0	0	0	0	0	0	13	13	13	13	40	40	40	40
14	40	40	40	40	1	1	1	1	1	1	1	1	2	2	2	2	8	8	8	8	51	51	51	51
15	26	26	26	26	0	0	0	0	1	1	1	1	1	1	1	1	11	11	11	11	38	38	38	38
16	19	19	19	19	0	0	0	0	3	3	3	3	8	8	8	8	11	11	11	11	41	41	41	41
17	2	2	2	2	0	0	0	0	25	25	25	25	2	2	2	2	2	2	2	2	32	32	32	32
18	0	0	0	0	0	0	0	0	10	10	10	10	1	1	1	1	0	0	0	0	11	11	11	11
19	2	2	2	2	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	2	2	2	2
20	5	5	5	5	1	1	1	1	0	0	0	0	1	1	1	1	4	4	4	4	11	11	11	11
21	2	2	2	2	1	1	1	1	0	0	0	0	0	0	0	0	7	7	7	7	10	10	10	10
22	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0	4	4	4	4	5	5	5	5
23	2	2	2	2	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	3	3	3	3
24	3	3	3	3	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	4	4	4	4
25	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
27	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1
28	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: West London Household Telephone Survey, 2006

TABLE 9
COMPARISON GOODS ALLOCATION - SPEND (£) 2005 PRICES

	HOUNSLOW TOWN CENTRE				FELTHAM TOWN CENTRE				CHISWICK TOWN CENTRE				BRENTFORD TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	568	724	923	1,175	0	0	0	0	1,645	2,098	2,673	3,402	0	0	0	0	0	0	0	0	2,214	2,822	3,596	4,577
2	714	920	1,176	1,505	0	0	0	0	8,885	11,448	14,622	18,718	1,071	1,380	1,763	2,257	714	920	1,176	1,505	11,386	14,669	18,737	23,985
3	1,758	2,252	2,915	3,744	0	0	0	0	9,357	11,985	15,512	19,923	268	344	445	571	1,321	1,692	2,190	2,812	12,704	16,273	21,062	27,051
4	901	1,135	1,421	1,783	0	0	0	0	8,359	10,526	13,174	16,531	2,294	2,889	3,615	4,537	2,432	3,063	3,833	4,810	13,987	17,612	22,043	27,661
5	0	0	0	0	0	0	0	0	3,443	4,284	5,293	6,562	3,469	4,317	5,333	6,613	5,680	7,068	8,733	10,828	12,591	15,669	19,359	24,003
6	1,041	1,299	1,617	2,014	0	0	0	0	438	546	680	847	1,712	2,136	2,659	3,313	1,346	1,679	2,090	2,604	4,537	5,660	7,045	8,777
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	133	166	206	257	133	166	206	257
8	1,885	2,332	2,905	3,606	0	0	0	0	0	0	0	0	307	380	473	588	0	0	0	0	2,192	2,712	3,378	4,194
9	2,243	2,810	3,540	4,446	0	0	0	0	107	134	168	211	0	0	0	0	334	419	527	662	2,683	3,362	4,236	5,319
10	21,985	27,914	35,645	45,323	0	0	0	0	0	0	0	0	297	377	481	612	1,808	2,295	2,931	3,727	24,089	30,586	39,057	49,662
11	33,761	42,468	53,883	68,019	587	738	937	1,183	1,535	1,931	2,450	3,093	474	596	756	954	6,050	7,610	9,656	12,189	42,406	53,344	67,682	85,438
12	12,743	15,661	19,458	24,045	10,717	13,172	16,365	20,223	0	0	0	0	309	379	471	582	6,135	7,541	9,369	11,577	29,904	36,753	45,663	56,427
13	14,235	17,660	22,146	27,618	8,975	11,135	13,963	17,414	0	0	0	0	0	0	0	0	11,135	13,814	17,323	21,604	34,344	42,608	53,433	66,636
14	41,569	52,554	66,289	83,646	1,044	1,320	1,665	2,100	844	1,067	1,346	1,698	1,619	2,047	2,582	3,258	7,815	9,880	12,462	15,725	52,890	66,868	84,343	106,427
15	26,297	32,799	41,059	51,293	0	0	0	0	757	944	1,182	1,477	1,227	1,530	1,916	2,393	11,235	14,014	17,543	21,915	39,517	49,287	61,699	77,079
16	10,502	13,017	16,162	20,049	0	0	0	0	1,445	1,791	2,223	2,758	4,675	5,794	7,194	8,925	6,256	7,754	9,628	11,944	22,877	28,357	35,208	43,676
17	4,424	5,469	6,733	8,306	0	0	0	0	49,200	60,825	74,878	92,374	4,397	5,436	6,692	8,256	3,953	4,887	6,016	7,422	61,974	76,618	94,319	116,358
18	530	682	877	1,126	0	0	0	0	22,178	28,579	36,740	47,170	1,310	1,688	2,170	2,787	900	1,159	1,490	1,913	24,918	32,109	41,279	52,997
19	2,959	3,946	5,141	6,735	0	0	0	0	166	222	289	379	0	0	0	0	910	1,213	1,580	2,071	4,035	5,380	7,010	9,185
20	11,414	15,301	20,110	26,501	1,302	1,746	2,294	3,023	0	0	0	0	1,520	2,037	2,678	3,529	9,400	12,602	16,562	21,826	23,636	31,686	41,644	54,879
21	2,181	2,825	3,647	4,702	1,115	1,444	1,865	2,404	0	0	0	0	213	275	356	459	6,937	8,987	11,604	14,961	10,445	13,532	17,471	22,526
22	549	686	861	1,079	1,112	1,390	1,745	2,186	0	0	0	0	0	0	0	0	4,100	5,128	6,438	8,065	5,760	7,205	9,045	11,330
23	469	595	755	957	0	0	0	0	0	0	0	0	0	0	0	0	370	469	595	754	839	1,063	1,350	1,710
24	1,804	2,353	3,029	3,911	316	412	530	684	0	0	0	0	0	0	0	0	0	0	0	0	2,120	2,765	3,559	4,595
25	734	962	1,240	1,606	0	0	0	0	0	0	0	0	215	281	363	470	0	0	0	0	949	1,243	1,603	2,076
26	0	0	0	0	0	0	0	0	287	364	459	579	0	0	0	0	0	0	0	0	287	364	459	579
27	855	1,045	1,293	1,590	0	0	0	0	0	0	0	0	2,608	3,189	3,945	4,852	0	0	0	0	3,463	4,234	5,237	6,441
28	3,571	5,091	6,993	9,590	0	0	0	0	0	0	0	0	0	0	0	0	512	729	1,002	1,374	4,083	5,820	7,995	10,964
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,953	2,499	3,177	4,046	1,953	2,499	3,177	4,046
Total	199,689	252,501	319,817	404,370	25,167	31,356	39,364	49,218	108,647	136,743	171,690	215,723	27,985	35,077	43,893	54,954	91,429	115,588	146,131	184,590	452,916	571,266	720,895	908,854

Source: Table 3 & 4

GLOBAL FORECASTS: BASELINE
ASSUMING NO NEW DEVELOPMENT
COMPARISON GOODS

TABLE 10

FUTURE SHOP FLOORSPACE CAPACITY:
WEST LONDON GLOBAL FORECAST

GROWTH IN SALES PER SQ M	COMPARISON GOODS 2	%pa '06-'21		
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	5,158,407	6,695,964	8,610,521	11,091,852
Market Share from Survey Area	25	25	25	25
Survey Area Residents Spending (£000)	1,278,401	1,626,975	2,064,140	2,619,659
Inflow ***to West London*** from Beyond Survey Area £000	178,726	229,773	293,663	375,658
Total West London Turnover	1,457,127	1,856,748	2,357,803	2,995,317
Existing Shop Floorspace (sq m net)	204,174	204,174	204,174	204,174
Sales per sq m net £	7,137	7,879	8,700	9,605
Sales from Existing Floorspace (£000)	1,457,127	1,608,786	1,776,229	1,961,101
Residual Spending to Support new shops (£000)	0	247,962	581,574	1,034,216
Sales per sq m net in new shops (£)	5,500	6,072	6,704	7,402
Capacity for new floorspace (sq m net)	0	40,834	86,744	139,716

WEST LONDON RETAIL NEEDS STUDY 2006

EALING/HAMMERSMITH & FULHAM/HOUNSLOW

GLOBAL FORECASTS: BASELINE
ASSUMING NO NEW DEVELOPMENT
COMPARISON GOODS

TABLE 11
FUTURE SHOP FLOORSPACE CAPACITY: BY LONDON BOROUGH

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2	%pa '06-'21									
	EALING BOROUGH COUNCIL COMPARISON GOODS				HAMMERSMITH & FULHAM BOROUGH COUNCIL COMPARISON GOODS				HOUNSLOW BOROUGH COUNCIL COMPARISON GOODS			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Total Available Expenditure (£000)	5,158,407	6,695,964	8,610,521	11,091,852	5,158,407	6,695,964	8,610,521	11,091,852	5,158,407	6,695,964	8,610,521	11,091,852
Market Share from Survey Area	10	10	10	10	6	6	6	6	9	9	9	9
Survey Area Residents Spending (£000)	495,196	622,751	780,819	980,046	330,289	432,958	562,427	730,759	452,916	571,266	720,895	908,854
Inflow from Beyond Survey Area £000	71,526	89,549	111,768	139,681	94,585	124,373	161,981	210,970	12,615	15,850	19,913	25,007
Total Borough Turnover	566,723	712,301	892,587	1,119,727	424,874	557,331	724,408	941,729	465,531	587,116	740,808	933,861
Existing Shop Floorspace (sq m net)	87,809	87,809	87,809	87,809	35,858	35,858	35,858	35,858	80,507	80,507	80,507	80,507
Sales per sq m net £	6,454	7,126	7,867	8,686	11,849	13,082	14,444	15,947	5,783	6,384	7,049	7,782
Sales from Existing Floorspace (£000)	566,723	625,707	690,832	762,734	424,874	469,095	517,918	571,824	465,531	513,983	567,479	626,543
Residual Spending to Support new shops (£000)	0	86,593	201,755	356,993	0	88,237	206,490	369,905	0	73,133	173,328	307,318
Sales per sq m net in new shops (£)	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402
Capacity for new floorspace (sq m net)	0	14,260	30,093	48,227	0	14,531	30,799	49,972	0	12,043	25,853	41,517

Ealing BC Inflow - 9.6%
Hammersmith & Fulham BC - 30.3%
Hounslow BC Inflow - 5.9%

GLOBAL FORECASTS: BASELINE
ASSUMING NO NEW DEVELOPMENT
COMPARISON GOODS

TABLE 12
FUTURE SHOP FLOORSPACE CAPACITY: LONDON BOROUGH OF EALING BY CENTRE

GROWTH IN SALES PER SQ M — COMPARISON GOODS 2 %pa '06-'21

	EALING TOWN CENTRE COMPARISON GOODS				HANWELL TOWN CENTRE COMPARISON GOODS				SOUTHALL TOWN CENTRE COMPARISON GOODS				ACTON TOWN CENTRE COMPARISON GOODS				GREENFORD TOWN CENTRE COMPARISON GOODS			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Survey Area Residents Spending (£000)	368,036	460,187	573,605	715,961	4,760	5,936	7,391	9,209	25,633	32,539	41,297	52,358	27,833	35,845	45,887	58,789	22,084	27,693	34,781	43,630
Inflow from Beyond Survey Area £000	66,481	83,127	103,615	129,329	711	887	1,104	1,376	1,636	2,077	2,636	3,342	2,224	2,864	3,667	4,698	474	594	746	936
Total Town Centre Turnover	434,517	543,314	677,220	845,290	5,471	6,823	8,496	10,586	27,269	34,616	43,933	55,700	30,057	38,709	49,555	63,487	22,558	28,287	35,527	44,566
Existing Shop Floorspace (sq m net)	38,464	38,464	38,464	38,464	6,588	6,588	6,588	6,588	16,656	16,656	16,656	16,656	6,884	6,884	6,884	6,884	5,737	5,737	5,737	5,737
Sales per sq m net £	11,297	12,473	13,771	15,204	830	917	1,012	1,118	1,637	1,808	1,996	2,203	4,366	4,821	5,322	5,876	3,932	4,341	4,793	5,292
Sales from Existing Floorspace (£000)	434,517	479,742	529,674	584,803	5,471	6,040	6,669	7,363	27,269	30,107	33,241	36,700	30,057	33,186	36,640	40,453	22,558	24,906	27,498	30,360
Residual Spending to Support new shops (£000)	0	63,572	147,546	260,487	0	782	1,827	3,223	0	4,509	10,692	19,000	0	5,523	12,915	23,034	0	3,382	8,029	14,206
Sales per sq m net in new shops (£)	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402
Capacity for new floorspace (sq m net)	0	10,469	22,007	35,190	0	129	272	435	0	743	1,595	2,567	0	910	1,926	3,112	0	557	1,197	1,919

TABLE 13
FUTURE SHOP FLOORSPACE CAPACITY: LONDON BOROUGH OF HAMMERSMITH & FULHAM BY CENTRE

GROWTH IN SALES PER SQ M — COMPARISON GOODS 2 %pa '06-'21

	HAMMERSMITH TOWN CENTRE COMPARISON GOODS				FULHAM TOWN CENTRE COMPARISON GOODS				SHEPHERD'S BUSH TOWN CENTRE COMPARISON GOODS			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Survey Area Residents Spending (£000)	173,713	225,835	291,655	376,655	81,395	105,794	136,354	175,924	61,601	83,666	111,638	148,773
Inflow from Beyond Survey Area £000	53,363	69,374	89,593	115,704	16,908	21,976	28,325	36,545	24,314	33,023	44,063	58,721
Total Town Centre Turnover	227,075	295,209	381,248	492,359	98,303	127,770	164,679	212,468	85,915	116,689	155,701	207,493
Existing Shop Floorspace (sq m net)	15,464	15,464	15,464	15,464	8,769	8,769	8,769	8,769	7,865	7,865	7,865	7,865
Sales per sq m net £	14,685	16,213	17,900	19,764	11,211	12,378	13,666	15,088	10,924	12,061	13,316	14,702
Sales from Existing Floorspace (£000)	227,075	250,709	276,803	305,613	98,303	108,534	119,830	132,303	85,915	94,857	104,730	115,630
Residual Spending to Support new shops (£000)	0	44,499	104,444	186,746	0	19,236	44,848	80,166	0	21,832	50,971	91,863
Sales per sq m net in new shops (£)	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402
Capacity for new floorspace (sq m net)	0	7,328	15,578	25,228	0	3,168	6,689	10,830	0	3,595	7,603	12,410

TABLE 14
FUTURE SHOP FLOORSPACE CAPACITY: LONDON BOROUGH OF HOUNSLOW BY CENTRE

GROWTH IN SALES PER SQ M — COMPARISON GOODS 2 %pa '06-'21

	HOUNSLOW TOWN CENTRE COMPARISON GOODS				FELTHAM TOWN CENTRE COMPARISON GOODS				CHISWICK TOWN CENTRE COMPARISON GOODS				BRENTFORD TOWN CENTRE COMPARISON GOODS			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Survey Area Residents Spending (£000)	199,689	252,501	319,817	404,370	25,167	31,356	39,364	49,218	108,647	136,743	171,690	215,723	27,985	35,077	43,893	54,954
Inflow from Beyond Survey Area £000	2,017	2,551	3,230	4,085	1,923	2,396	3,008	3,762	5,839	7,349	9,227	11,593	2,835	3,554	4,447	5,568
Total Town Centre Turnover	201,706	255,052	323,047	408,454	27,090	33,753	42,373	52,979	114,485	144,091	180,917	227,316	30,820	38,631	48,340	60,522
Existing Shop Floorspace (sq m net)	23,718	23,718	23,718	23,718	9,814	9,814	9,814	9,814	13,010	13,010	13,010	13,010	2,122	2,122	2,122	2,122
Sales per sq m net £	8,504	9,390	10,367	11,446	2,760	3,048	3,365	3,715	8,800	9,715	10,727	11,843	14,522	16,034	17,703	19,545
Sales from Existing Floorspace (£000)	201,706	222,700	245,879	271,470	27,090	29,910	33,023	36,460	114,485	126,401	139,557	154,082	30,820	34,028	37,569	41,480
Residual Spending to Support new shops (£000)	0	32,352	77,168	136,984	0	3,843	9,349	16,519	0	17,690	41,360	73,234	0	4,604	10,771	19,042
Sales per sq m net in new shops (£)	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402
Capacity for new floorspace (sq m net)	0	5,328	11,510	18,506	0	633	1,395	2,232	0	2,913	6,169	9,893	0	758	1,607	2,572

COMPARISON GOODS ASSESSMENT: WITH KEY PROPOSALS AND COMMITMENTS
EALING BOROUGH COUNCIL

TABLE 15
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	EALING TOWN CENTRE				SOUTHALL TOWN CENTRE				ACTON TOWN CENTRE				HANWELL TOWN CENTRE				GREENFORD TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
3	4	2	2	2	0	1	1	1	2	2	2	2	0	0	0	0	0	0	0	0	6	6	6	6	12	11	11	11
4	40	24	24	24	0	1	1	1	5	5	5	5	0	0	0	0	1	0	0	0	4	4	4	4	50	35	35	35
5	53	53	53	53	0	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0	2	2	2	2	56	57	57	57
6	46	46	46	46	1	0	0	0	0	0	0	0	2	2	2	2	1	1	1	1	2	2	2	2	52	52	52	52
7	21	21	21	21	0	0	0	0	0	0	0	0	0	0	0	0	5	5	5	5	1	1	1	1	28	28	28	28
8	9	9	9	9	1	3	3	3	0	0	0	0	0	0	0	0	4	3	3	3	0	0	0	0	15	16	16	16
9	19	16	16	16	7	16	16	16	0	0	0	0	0	0	0	0	10	7	7	7	2	2	2	2	37	41	41	41
10	17	14	14	14	6	11	11	11	0	0	0	0	0	0	0	0	1	1	1	1	2	2	2	2	26	28	28	28
11	1	1	1	1	1	3	3	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	4	4	4
12	0	0	0	0	4	10	10	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	10	10	10
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	2	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	2	2	2
15	2	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	2	2	2
16	18	18	18	18	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	19	18	18	18
17	2	2	2	2	0	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	5	4	4	4
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	1	1	1	1	2	5	5	5	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	5	7	7	7
25	1	1	1	1	2	6	6	6	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	5	8	8	8
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
27	4	2	2	2	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	1	1	1	1	6	4	4	4
28	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	2	2	2	2	3	3	3	3
29	0	0	0	0	0	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: West London Household Telephone Survey, 2006

TABLE 16
COMPARISON GOODS ALLOCATION - SPEND (£) 2005 PRICES

	EALING TOWN CENTRE				SOUTHALL TOWN CENTRE				ACTON TOWN CENTRE				HANWELL TOWN CENTRE				GREENFORD TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	0	0	0	0	1,701	2,169	2,764	3,517	0	0	0	0	0	0	0	0	0	0	0	0	1,701	2,169	2,764	3,517
2	714	920	1,176	1,505	0	0	0	0	973	1,253	1,601	2,050	0	0	0	0	0	0	0	0	1,608	2,072	2,647	3,388	3,296	4,246	5,423	6,943
3	5,973	3,741	4,842	6,218	671	2,210	2,861	3,674	3,276	3,888	5,032	6,463	0	0	0	0	0	0	0	0	9,878	12,653	16,377	21,033	19,798	22,492	29,112	37,389
4	64,318	49,915	62,473	78,394	528	1,713	2,143	2,690	8,210	9,727	12,174	15,277	0	0	0	0	1,235	944	1,182	1,483	6,446	8,116	10,158	12,747	80,738	70,415	88,131	110,590
5	134,102	166,878	206,177	255,638	548	1,756	2,170	2,690	1,813	2,257	2,788	3,457	0	0	0	0	751	934	1,154	1,431	6,060	7,541	9,317	11,552	143,274	179,366	221,606	274,768
6	72,282	89,990	112,001	139,549	991	661	823	1,025	0	0	0	0	2,987	3,726	4,638	5,779	2,119	2,351	2,925	3,645	3,683	4,595	5,719	7,126	82,062	101,324	126,107	157,124
7	16,847	20,918	26,058	32,406	66	212	264	328	343	426	531	660	222	276	344	428	3,729	4,631	5,769	7,174	950	1,180	1,470	1,828	22,158	27,643	34,436	42,824
8	9,268	10,838	13,503	16,763	1,185	3,652	4,550	5,648	327	404	503	625	175	216	269	334	3,544	4,143	5,162	6,408	235	291	362	450	14,734	19,544	24,350	30,229
9	12,645	14,069	17,725	22,258	4,500	13,413	16,898	21,220	0	0	0	0	0	0	0	0	6,894	6,010	7,572	9,508	1,035	1,297	1,633	2,051	25,073	34,788	43,827	55,038
10	17,111	18,284	23,348	29,688	5,719	15,028	19,190	24,401	400	508	649	825	0	0	0	0	1,138	788	1,006	1,279	2,146	2,724	3,479	4,423	26,513	37,332	47,671	60,615
11	765	962	1,221	1,541	944	3,056	3,877	4,894	0	0	0	0	0	0	0	0	92	116	147	186	150	189	240	302	1,951	4,323	5,485	6,924
12	0	0	0	0	2,365	7,481	9,295	11,486	0	0	0	0	153	188	234	289	0	0	0	0	77	94	117	144	2,595	7,763	9,645	11,919
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	1,578	23	29	37	964	1,692	2,135	2,693	0	0	0	0	80	101	128	162	80	101	128	162	404	511	645	814	3,107	2,429	3,064	3,867
15	1,595	1,218	1,525	1,905	791	1,253	1,569	1,960	0	0	0	0	94	117	147	183	0	0	0	0	358	446	558	698	2,837	3,035	3,799	4,746
16	10,179	12,618	15,666	19,434	0	0	0	0	0	0	0	0	347	17	21	27	0	0	0	0	62	77	96	119	10,589	12,712	15,784	19,580
17	4,767	4,689	5,772	7,121	394	1,252	1,542	1,902	2,744	3,392	4,176	5,151	302	374	460	568	0	0	0	0	588	727	895	1,104	8,795	10,434	12,845	15,846
18	0	0	0	0	0	0	0	0	456	588	756	970	0	0	0	0	0	0	0	0	1,088	1,401	1,802	2,313	1,544	1,989	2,558	3,284
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	290	375	484	625	290	375	484	625
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	28	91	116	147	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	28	91	116	147
24	654	854	1,099	1,419	1,027	3,447	4,436	5,728	0	0	0	0	0	0	0	0	598	780	1,004	1,297	227	297	382	493	2,507	5,377	6,920	8,937
25	1,834	1,604	2,068	2,678	3,363	11,338	14,618	18,928	0	0	0	0	0	0	0	0	1,217	1,595	2,056	2,663	217	284	366	474	6,631	14,821	19,109	24,743
26	827	1,049	1,321	1,668	0	0	0	0	0	0	0	0	399	506	637	804	686	870	1,096	1,384	312	396	498	629	2,224	2,821	3,552	4,485
27	10,207	5,841	7,225	8,886	585	1,575	1,948	2,396	2,493	3,049	3,771	4,638	0	0	0	0	0	0	0	0	2,195	2,684	3,320	4,083	15,480	13,149	16,265	20,003
28	1,402	1,999	2,745	3,765	0	0	0	0	5,095	7,264	9,977	13,682	0	0	0	0	0	0	0	0	8,369	11,930	16,387	22,472	14,866	21,192	29,110	39,919
29	968	1,372	1,849	2,514	964	3,517	4,743	6,448	0	0	0	0	0	0	0	0	0	0	0	0	473	671	904	1,229	2,405	5,560	7,496	10,191
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	368,036	407,782	507,825	633,388	25,633	73,347	93,175	118,258	27,833	34,925	44,723	57,316	4,760	5,522	6,878	8,573	22,084	23,263	29,201	36,618	46,850	60,551	77,857	100,098	495,196	605,391	759,659	954,251

COMPARISON GOODS ASSESSMENT: WITH KEY PROPOSALS AND COMMITMENTS
HAMMERSMITH & FULHAM BOROUGH COUNCIL

TABLE 17
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	HAMMERSMITH TOWN CENTRE				FULHAM TOWN CENTRE				SHEPHERDS BUSH TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	6	6	6	6	21	19	19	19	0	13	13	13	1	1	1	1	28	39	39	39
2	27	25	25	25	3	2	2	2	3	16	16	16	0	0	0	0	33	44	44	44
3	22	20	20	20	1	1	1	1	9	27	27	27	0	0	0	0	32	48	48	48
4	3	3	3	3	0	0	0	0	1	8	8	8	0	0	0	0	4	11	11	11
5	0	0	0	0	0	0	0	0	0	8	8	8	0	0	0	0	0	8	8	8
6	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
7	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
12	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
17	7	6	6	6	1	1	1	1	0	9	9	9	0	0	0	0	8	16	16	16
18	4	4	4	4	0	0	0	0	0	9	9	9	0	0	0	0	5	14	14	14
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
27	0	0	0	0	0	0	0	0	0	12	12	12	0	0	0	0	1	13	13	13
28	5	4	4	4	1	1	1	1	6	17	17	17	0	0	0	0	12	23	23	23
29	0	0	0	0	2	2	2	2	0	11	11	11	0	0	0	0	3	14	14	14
30	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	2	2	2	2

SOURCE: West London Household Telephone Survey, 2006

TABLE 18
COMPARISON GOODS ALLOCATION - SPEND (£) 2005 PRICES

	HAMMERSMITH TOWN CENTRE				FULHAM TOWN CENTRE				SHEPHERDS BUSH TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	13,758	17,538	22,349	28,442	51,358	60,725	77,381	98,480	783	42,137	53,695	68,336	3,230	4,117	5,247	6,677	69,129	124,518	158,671	201,935
2	67,444	80,472	102,789	131,581	6,582	6,779	8,659	11,085	8,128	52,202	66,679	85,356	714	920	1,176	1,505	82,869	140,373	179,303	229,527
3	35,332	41,141	53,250	68,391	1,782	2,283	2,955	3,795	14,818	56,017	72,504	93,118	0	0	0	0	51,933	99,441	128,709	165,304
4	4,213	5,305	6,640	8,332	0	0	0	0	1,672	16,368	20,486	25,707	0	0	0	0	5,886	21,673	27,126	34,038
5	1,271	1,582	1,954	2,423	0	0	0	0	0	25,028	30,922	38,340	0	0	0	0	1,271	26,610	32,877	40,764
6	947	1,024	1,275	1,589	0	0	0	0	0	0	0	0	281	350	436	543	1,228	1,375	1,711	2,132
7	489	529	659	819	0	0	0	0	0	0	0	0	0	0	0	0	489	529	659	819
8	0	0	0	0	0	0	0	0	153	189	236	292	0	0	0	0	153	189	236	292
9	0	0	0	0	0	0	0	0	0	0	0	0	107	134	168	211	107	134	168	211
10	0	0	0	0	0	0	0	0	303	385	491	624	0	0	0	0	303	385	491	624
11	798	1,004	1,274	1,608	0	0	0	0	189	237	301	380	210	264	335	423	1,197	1,506	1,910	2,411
12	394	37	46	57	137	169	210	259	0	0	0	0	137	169	210	259	668	375	466	575
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	80	101	128	162	0	0	0	0	0	0	0	0	80	101	128	162
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	701	593	736	913	0	0	0	0	0	0	0	0	0	0	0	0	701	593	736	913
17	13,486	15,227	18,745	23,125	1,239	1,532	1,886	2,327	669	21,739	27,710	34,185	0	0	0	0	15,394	38,498	48,341	59,637
18	8,634	11,126	14,303	18,364	900	1,159	1,490	1,913	630	26,155	33,624	43,170	887	1,143	1,469	1,886	11,051	39,583	50,887	65,332
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	468	628	825	1,088	0	0	0	0	0	0	0	0	468	628	825	1,088
21	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
22	92	115	144	180	0	0	0	0	0	0	0	0	0	0	0	0	92	115	144	180
23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	0	0	0	0	0	0	0	0	0	0	0	0	283	370	476	614	283	370	476	614
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26	452	573	722	911	0	0	0	0	0	0	0	0	0	0	0	0	452	573	722	911
27	0	0	0	0	871	1,065	1,317	1,620	855	40,882	50,571	62,194	0	0	0	0	1,725	41,947	51,888	63,814
28	24,488	32,682	44,893	61,561	3,832	5,463	7,504	10,290	33,400	129,246	177,536	243,454	2,069	2,950	4,052	5,557	63,790	170,341	233,985	320,862
29	1,215	1,723	2,323	3,158	9,725	13,787	18,588	25,271	0	65,679	88,554	120,392	0	0	0	0	10,941	81,188	109,465	148,821
30	0	0	0	0	4,418	5,655	7,188	9,154	0	0	0	0	5,662	7,247	9,212	11,732	10,081	12,901	16,400	20,886
Total	173,713	210,671	272,101	351,454	81,395	99,346	128,132	165,444	61,601	476,264	623,309	815,548	13,581	17,664	22,780	29,408	330,289	803,944	1,046,323	1,361,854

WEST LONDON RETAIL NEEDS STUDY 2006
EALING/HAMMERSMITH & FULHAM/HOUNSLOW

COMPARISON GOODS ASSESSMENT: WITH KEY PROPOSALS AND COMMITMENTS
HOUNSLOW BOROUGH COUNCIL

TABLE 19
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	HOUNSLOW TOWN CENTRE				FELTHAM TOWN CENTRE				CHISWICK TOWN CENTRE				BRENTFORD TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
2	0	0	0	0	0	0	0	0	4	3	3	3	0	0	0	0	0	0	0	0	5	4	4	4
3	1	1	1	1	0	0	0	0	6	5	5	5	0	0	0	0	1	1	1	1	8	7	7	7
4	1	1	1	1	0	0	0	0	5	5	5	5	1	1	1	1	2	2	2	2	9	8	8	8
5	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	2	2	2	2	5	5	5	5
6	1	1	1	1	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	3	3	3	3
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	2	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2
9	3	2	2	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	3	3	3
10	21	21	21	21	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	23	23	23	23
11	41	52	52	52	1	1	1	1	2	0	0	0	1	1	1	1	7	7	7	7	52	61	61	61
12	21	25	25	25	18	31	31	31	0	0	0	0	1	0	0	0	10	10	10	10	49	67	67	67
13	17	20	20	20	11	18	18	18	0	0	0	0	0	0	0	0	13	13	13	13	40	51	51	51
14	40	55	55	55	1	1	1	1	1	0	0	0	2	1	1	1	8	8	8	8	51	66	66	66
15	26	35	35	35	0	0	0	0	1	0	0	0	1	1	1	1	11	11	11	11	38	47	47	47
16	19	22	22	22	0	0	0	0	3	2	2	2	8	8	8	8	11	11	11	11	41	43	43	43
17	2	2	2	2	0	0	0	0	25	25	25	25	2	2	2	2	2	2	2	2	32	32	32	32
18	0	0	0	0	0	0	0	0	10	10	10	10	1	0	0	0	0	0	0	0	11	11	11	11
19	2	2	2	2	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	2	3	3	3
20	5	6	6	6	1	1	1	1	0	0	0	0	1	1	1	1	4	4	4	4	11	12	12	12
21	2	2	2	2	1	2	2	2	0	0	0	0	0	0	0	0	7	7	7	7	10	11	11	11
22	1	1	1	1	1	2	2	2	0	0	0	0	0	0	0	0	4	4	4	4	5	6	6	6
23	2	2	2	2	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	3	3	3	3
24	3	2	2	2	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	3	3	3
25	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
27	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1	1	1	1
28	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: West London Household Telephone Survey, 2006

TABLE 20
COMPARISON GOODS ALLOCATION - SPEND (£) 2005 PRICES

	HOUNSLOW TOWN CENTRE				FELTHAM TOWN CENTRE				CHISWICK TOWN CENTRE				BRENTFORD TOWN CENTRE				OUT OF CENTRE FLOORSPACE				TOTAL			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	568	858	1,093	1,391	0	0	0	0	1,645	832	1,060	1,349	0	0	0	0	0	0	0	0	2,214	1,689	2,153	2,740
2	714	1,090	1,392	1,782	0	0	0	0	8,885	8,238	10,522	13,469	1,071	1,380	1,763	2,257	714	920	1,176	1,505	11,386	11,628	14,853	19,013
3	1,758	1,638	2,120	2,723	0	0	0	0	9,357	10,339	13,382	17,186	268	344	445	571	1,321	1,692	2,190	2,812	12,704	14,012	18,136	23,293
4	901	1,344	1,682	2,111	0	0	0	0	8,359	9,344	11,695	14,675	2,294	2,889	3,615	4,537	2,432	3,063	3,833	4,810	13,987	16,639	20,825	26,133
5	0	0	0	0	0	0	0	0	3,443	4,284	5,293	6,562	3,469	3,683	4,550	5,642	5,680	7,068	8,733	10,828	12,591	15,035	18,576	23,032
6	1,041	1,538	1,914	2,385	0	0	0	0	438	546	680	847	1,712	2,136	2,659	3,313	1,346	1,679	2,090	2,604	4,537	5,899	7,342	9,148
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	133	166	206	257	133	166	206	257
8	1,885	1,650	2,055	2,551	0	0	0	0	0	0	0	0	307	380	473	588	0	0	0	0	2,192	2,030	2,529	3,139
9	2,243	1,621	2,042	2,564	0	0	0	0	107	134	168	211	0	0	0	0	334	419	527	662	2,683	2,173	2,738	3,438
10	21,985	28,031	35,794	45,513	0	0	0	0	0	0	0	0	297	377	481	612	1,808	2,295	2,931	3,727	24,089	30,703	39,206	49,851
11	33,761	53,684	68,114	85,984	587	949	1,204	1,519	1,535	381	484	611	474	596	756	954	6,050	7,610	9,656	12,189	42,406	63,220	80,213	101,257
12	12,743	18,459	22,933	28,339	10,717	23,266	28,906	35,720	0	0	0	0	309	342	425	525	6,135	7,541	9,369	11,577	29,904	49,607	61,633	76,161
13	14,235	20,908	26,219	32,698	8,975	19,483	24,433	30,471	0	0	0	0	0	0	0	0	11,135	13,814	17,323	21,604	34,344	54,205	67,976	84,773
14	41,569	72,802	91,828	115,872	1,044	1,305	1,646	2,076	844	410	517	652	1,619	1,915	2,416	3,049	7,815	9,880	12,462	15,725	52,890	86,312	108,868	137,374
15	26,297	44,917	56,229	70,245	0	0	0	0	757	302	378	472	1,227	1,530	1,916	2,393	11,235	14,014	17,543	21,915	39,517	60,763	76,065	95,025
16	10,502	15,411	19,135	23,737	0	0	0	0	1,445	1,102	1,368	1,697	4,675	5,519	6,852	8,500	6,256	7,754	9,628	11,944	22,877	29,787	36,983	45,878
17	4,424	5,897	7,259	8,956	0	0	0	0	49,200	60,825	74,878	92,374	4,397	4,713	5,803	7,158	3,953	4,887	6,016	7,422	61,974	76,322	93,956	115,910
18	530	808	1,039	1,334	0	0	0	0	22,178	27,453	35,292	45,311	1,310	844	1,084	1,392	900	1,159	1,490	1,913	24,918	30,264	38,906	49,951
19	2,959	4,671	6,086	7,974	0	0	0	0	166	222	289	379	0	0	0	0	910	1,213	1,580	2,071	4,035	6,106	7,955	10,424
20	11,414	18,115	23,808	31,375	1,302	2,271	2,985	3,934	0	0	0	0	1,520	2,037	2,678	3,529	9,400	12,602	16,562	21,826	23,636	35,026	46,034	60,664
21	2,181	3,344	4,318	5,567	1,115	2,428	3,134	4,041	0	0	0	0	213	275	356	459	6,937	8,987	11,604	14,961	10,445	15,035	19,411	25,028
22	549	812	1,020	1,278	1,112	2,650	3,327	4,168	0	0	0	0	0	0	0	0	4,100	5,128	6,438	8,065	5,760	8,591	10,785	13,510
23	469	673	854	1,083	0	0	0	0	0	0	0	0	0	0	0	0	370	469	595	754	839	1,142	1,449	1,837
24	1,804	1,610	2,072	2,676	316	309	397	513	0	0	0	0	0	0	0	0	0	0	0	0	2,120	1,919	2,469	3,189
25	734	1,139	1,468	1,901	0	0	0	0	0	0	0	0	215	281	363	470	0	0	0	0	949	1,420	1,831	2,371
26	0	0	0	0	0	0	0	0	287	364	459	579	0	0	0	0	0	0	0	0	287	364	459	579
27	855	1,237	1,530	1,882	0	0	0	0	0	0	0	0	2,608	1,529	1,892	2,326	0	0	0	0	3,463	2,766	3,422	4,208
28	3,571	6,027	8,279	11,354	0	0	0	0	0	0	0	0	0	0	0	0	512	729	1,002	1,374	4,083	6,757	9,281	12,727
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,953	2,499	3,177	4,046	1,953	2,499	3,177	4,046
Total	199,689	308,283	390,284	493,271	25,167	52,660	66,032	82,442	108,647	124,775	156,464	196,376	27,985	30,772	38,527	48,276	91,429	115,588	146,131	184,590	452,916	632,078	797,438	1,004,954

GLOBAL FORECASTS:
WITH KEY PROPOSALS AND COMMITMENTS
COMPARISON GOODS

TABLE 21

FUTURE SHOP FLOORSPACE CAPACITY:
WEST LONDON GLOBAL FORECAST

GROWTH IN SALES PER SQ M	COMPARISON GOODS 2		%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total West London Turnover Following all Commitments (£000s) Based on Change to Market Shares	1,457,127	2,429,220	3,102,715	3,964,195
Existing Shop Floorspace (sq m net)	204,174	204,174	204,174	204,174
Sales per sq m net £	7,137	7,879	8,700	9,605
Sales from Existing Floorspace (£000)	1,457,127	1,608,786	1,776,229	1,961,101
Residual Spending to Support new shops (£000)	0	820,435	1,326,486	2,003,094
Sales per sq m net in new shops (£)	5,500	6,072	6,704	7,402
Capacity for new floorspace (sq m net)	0	135,108	197,851	270,605
Floorspace Key Proposals & Commitments (sq m net)	0	115,613	115,613	115,613
Capacity for new floorspace (sq m net) after proposals and commitments	0	19,495	82,238	154,992

WEST LONDON RETAIL NEEDS STUDY 2006
EALING/HAMMERSMITH & FULHAM/HOUNSLOW

BOROUGH FORECASTS: WITH KEY PROPOSALS AND COMMITMENTS COMPARISON GOODS

TABLE 22
FUTURE SHOP FLOORSPACE CAPACITY: BY LONDON BOROUGH

GROWTH IN SALES PER SQ M	COMPARISON GOODS 2 %pa '06-'21											
	EALING BOROUGH COUNCIL COMPARISON GOODS				HAMMERSMITH & FULHAM BOROUGH COUNCIL COMPARISON GOODS				HOUNSLOW BOROUGH COUNCIL COMPARISON GOODS			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Total Borough Turnover Following all Commitments (£000)	566,723	691,321	866,979	1,088,462	424,874	1,070,550	1,393,857	1,814,859	465,531	667,349	841,880	1,060,875
Existing Shop Floorspace (sq m net)	87,809	87,809	87,809	87,809	35,858	35,858	35,858	35,858	80,507	80,507	80,507	80,507
Sales per sq m net £	6,454	7,126	7,867	8,686	11,849	13,082	14,444	15,947	5,783	6,384	7,049	7,782
Sales from Existing Floorspace (£000)	566,723	625,707	690,832	762,734	424,874	469,095	517,918	571,824	465,531	513,983	567,479	626,543
Residual Spending to Support new shops (£000)	0	65,613	176,147	325,728	0	601,455	875,938	1,243,035	0	153,366	274,400	434,332
Sales per sq m net in new shops (£)	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402
Capacity for new floorspace (sq m net)	0	10,805	26,273	44,004	0	99,047	130,650	167,926	0	25,256	40,928	58,675
Floorspace Key Proposals & Commitments (sq m net)	0	8,675	8,675	8,675	0	88,676	88,676	88,676	0	18,262	18,262	18,262
Capacity for new floorspace (sq m net) after proposals and commitments	0	2,130	17,598	35,329	0	10,371	41,974	79,250	0	6,994	22,666	40,413

CENTRE FORECASTS: WITH KEY PROPOSALS AND COMMITMENTS
COMPARISON GOODS

TABLE 23

FUTURE SHOP FLOORSPACE CAPACITY: LONDON BOROUGH OF EALING BY CENTRE

GROWTH IN SALES PER SQ M — COMPARISON GOODS 2 %pa '06-'21

	EALING TOWN CENTRE COMPARISON GOODS				HANWELL TOWN CENTRE COMPARISON GOODS				SOUTHALL TOWN CENTRE COMPARISON GOODS				ACTON TOWN CENTRE COMPARISON GOODS				GREENFORD TOWN CENTRE COMPARISON GOODS			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Total Town Centre Turnover Following All Commitments (£000)	434,517	481,443	599,557	747,801	5,471	6,370	7,934	9,889	27,269	81,141	103,076	130,823	30,057	37,976	48,630	62,323	22,558	23,840	29,925	37,526
Existing Shop Floorspace (sq m net)	38,464	38,464	38,464	38,464	6,588	6,588	6,588	6,588	16,656	16,656	16,656	16,656	6,884	6,884	6,884	6,884	5,737	5,737	5,737	5,737
Sales per sq m net £	11,297	12,473	13,771	15,204	830	917	1,012	1,118	1,637	1,808	1,996	2,203	4,366	4,821	5,322	5,876	3,932	4,341	4,793	5,292
Sales from Existing Floorspace (£000)	434,517	479,742	529,674	584,803	5,471	6,040	6,669	7,363	27,269	30,107	33,241	36,700	30,057	33,186	36,640	40,453	22,558	24,906	27,498	30,360
Residual Spending to Support new shops (£000)	0	1,701	69,883	162,999	0	330	1,265	2,526	0	51,034	69,835	94,123	0	4,790	11,990	21,870	0	-1,066	2,427	7,166
Sales per sq m net in new shops (£)	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402
Capacity for new floorspace (sq m net)	0	280	10,423	22,020	0	54	189	341	0	8,404	10,416	12,715	0	789	1,788	2,955	0	-176	362	968
Floorspace Key Proposals & Commitments (sq m net)	0	0	0	0	0	0	0	0	0	8,675	8,675	8,675	0	0	0	0	0	0	0	0
Capacity for new floorspace (sq m net) after proposals and commitments	0	280	10,423	22,020	0	54	189	341	0	-271	1,741	4,040	0	789	1,788	2,955	0	-176	362	968

TABLE 24

FUTURE SHOP FLOORSPACE CAPACITY: LONDON BOROUGH OF HAMMERSMITH & FULHAM BY CENTRE

GROWTH IN SALES PER SQ M — COMPARISON GOODS 2 %pa '06-'21

	HAMMERSMITH TOWN CENTRE COMPARISON GOODS				FULHAM TOWN CENTRE COMPARISON GOODS				SHEPHERD'S BUSH TOWN CENTRE COMPARISON GOODS			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Total Town Centre Turnover Following All Commitments (£000)	227,075	269,121	347,595	448,965	98,303	119,520	154,152	199,040	85,915	664,245	869,329	1,137,446
Existing Shop Floorspace (sq m net)	15,464	15,464	15,464	15,464	8,769	8,769	8,769	8,769	7,865	7,865	7,865	7,865
Sales per sq m net £	14,685	16,213	17,900	19,764	11,211	12,378	13,666	15,088	10,924	12,061	13,316	14,702
Sales from Existing Floorspace (£000)	227,075	250,709	276,803	305,613	98,303	108,534	119,830	132,303	85,915	94,857	104,730	115,630
Residual Spending to Support new shops (£000)	0	18,412	70,792	143,352	0	10,985	34,322	66,738	0	569,389	764,599	1,021,816
Sales per sq m net in new shops (£)	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402
Capacity for new floorspace (sq m net)	0	3,032	10,559	19,366	0	1,809	5,119	9,016	0	93,766	114,043	138,041
Floorspace Key Proposals & Commitments (sq m net)	0	0	0	0	0	0	0	0	0	88,676	88,676	88,676
Capacity for new floorspace (sq m net) after proposals and commitments	0	3,032	10,559	19,366	0	1,809	5,119	9,016	0	5,090	25,367	49,365

TABLE 25

FUTURE SHOP FLOORSPACE CAPACITY: LONDON BOROUGH OF HOUNSLOW BY CENTRE

GROWTH IN SALES PER SQ M — COMPARISON GOODS 2 %pa '06-'21

	HOUNSLOW TOWN CENTRE COMPARISON GOODS				FELTHAM TOWN CENTRE COMPARISON GOODS				CHISWICK TOWN CENTRE COMPARISON GOODS				BRENTFORD TOWN CENTRE COMPARISON GOODS			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Total Town Centre Turnover Following All Commitments (£000)	201,706	326,482	413,323	522,390	27,090	58,877	73,828	92,175	114,485	132,288	165,885	208,201	30,820	34,115	42,712	53,519
Existing Shop Floorspace (sq m net)	23,718	23,718	23,718	23,718	9,814	9,814	9,814	9,814	13,010	13,010	13,010	13,010	2,122	2,122	2,122	2,122
Sales per sq m net £	8,504	9,390	10,367	11,446	2,760	3,048	3,365	3,715	8,800	9,715	10,727	11,843	14,522	16,034	17,703	19,545
Sales from Existing Floorspace (£000)	201,706	222,700	245,879	271,470	27,090	29,910	33,023	36,460	114,485	126,401	139,557	154,082	30,820	34,028	37,569	41,480
Residual Spending to Support new shops (£000)	0	103,782	167,444	250,920	0	28,967	40,805	55,715	0	5,887	26,329	54,119	0	87	5,142	12,039
Sales per sq m net in new shops (£)	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402	5,500	6,072	6,704	7,402
Capacity for new floorspace (sq m net)	0	17,091	24,975	33,898	0	4,770	6,086	7,527	0	969	3,927	7,311	0	14	767	1,626
Floorspace Key Proposals & Commitments (sq m net)	0	12,605	12,605	12,605	0	5,657	5,657	5,657	0	0	0	0	0	0	0	0
Capacity for new floorspace (sq m net) after proposals and commitments	0	4,486	12,370	21,293	0	-887	429	1,870	0	969	3,927	7,311	0	14	767	1,626

APPENDIX 14:

COMPARISON GOODS CAPACITY FORECASTS SCENARIO TESTING

CAPACITY FORECASTS: SCENARIO TESTING NO COMMITMENTS

TABLE 1: GLOBAL CAPACITY
IN THE THREE WEST LONDON AUTHORITIES (SQ M NET)

SCENARIO	WEST LONDON AUTHORITIES		
	2011	2016	2021
3.8% Growth / 1.5% Efficiency	40,608	86,293	139,033
3.8% Growth / 2% Efficiency	33,254	69,572	110,508
3.8% Growth / 2.5% Efficiency	26,113	53,730	84,134
4.3% Growth / 1.5% Efficiency	48,440	104,457	170,669
4.3% Growth / 2% Efficiency	40,834	86,744	139,716
4.3% Growth / 2.5% Efficiency	33,449	69,961	111,098

CAPACITY FORECASTS: SCENARIO TESTING AFTER IMPLEMENTATION OF COMMITMENTS

TABLE 2: GLOBAL CAPACITY
IN THE THREE WEST LONDON AUTHORITIES (SQ M NET)

SCENARIO	WEST LONDON AUTHORITIES		
	2011	2016	2021
3.8% Growth / 1.5% Efficiency	19,203	81,743	154,298
3.8% Growth / 2% Efficiency	9,562	59,697	116,473
3.8% Growth / 2.5% Efficiency	201	38,808	81,501
4.3% Growth / 1.5% Efficiency	29,446	105,547	195,958
4.3% Growth / 2% Efficiency	19,495	82,238	154,992
4.3% Growth / 2.5% Efficiency	9,832	60,152	117,117

CAPACITY FORECASTS: SCENARIO TESTING
NO COMMITMENTS

TABLE 3: CAPACITY BY BOROUGH (SQ M NET)

SCENARIO	EALING BOROUGH COUNCIL			HAMMERSMITH & FULHAM BOROUGH COUNCIL			HOUNSLOW BOROUGH COUNCIL		
	2011	2016	2021	2011	2016	2021	2011	2016	2021
3.8% Growth / 1.5% Efficiency	14,187	29,948	48,011	14,441	30,621	49,699	11,980	25,724	41,323
3.8% Growth / 2% Efficiency	11,365	23,618	37,347	12,234	25,483	40,731	9,655	20,471	32,430
3.8% Growth / 2.5% Efficiency	8,626	17,621	27,488	10,090	20,616	32,439	7,397	15,493	24,207
4.3% Growth / 1.5% Efficiency	17,178	36,798	59,799	16,814	36,241	59,704	14,448	31,418	51,167
4.3% Growth / 2% Efficiency	14,260	30,093	48,227	14,531	30,799	49,972	12,043	25,853	41,517
4.3% Growth / 2.5% Efficiency	11,427	23,739	37,529	12,314	25,642	40,974	9,708	20,579	32,594

CAPACITY FORECASTS: SCENARIO TESTING
AFTER IMPLEMENTATION OF COMMITMENTS

TABLE 4: CAPACITY BY BOROUGH (SQ M NET)

SCENARIO	EALING BOROUGH COUNCIL			HAMMERSMITH & FULHAM BOROUGH COUNCIL			HOUNSLOW BOROUGH COUNCIL		
	2011	2016	2021	2011	2016	2021	2011	2016	2021
3.8% Growth / 1.5% Efficiency	2,384	17,827	35,537	9,518	40,948	78,040	7,300	22,968	40,721
3.8% Growth / 2% Efficiency	-361	11,662	25,144	5,278	31,063	60,756	4,645	16,971	30,573
3.8% Growth / 2.5% Efficiency	-3,027	5,821	15,534	1,161	21,698	44,777	2,067	11,289	21,190
4.3% Growth / 1.5% Efficiency	4,962	24,111	46,577	14,756	52,445	98,005	9,728	28,991	51,376
4.3% Growth / 2% Efficiency	2,130	17,598	35,329	10,371	41,974	79,250	6,994	22,666	40,413
4.3% Growth / 2.5% Efficiency	-620	11,427	24,929	6,112	32,052	61,910	4,340	16,673	30,277

CAPACITY FORECASTS: SCENARIO TESTING
NO COMMITMENTS

TABLE 5: CAPACITY BY CENTRE, EALING BOROUGH COUNCIL (SQ M NET)

SCENARIO	EALING TOWN CENTRE			SOUTHALL TOWN CENTRE			ACTON TOWN CENTRE			HANWELL TOWN CENTRE			GREENFORD TOWN CENTRE		
	2011	2016	2021	2011	2016	2021	2011	2016	2021	2011	2016	2021	2011	2016	2021
3.8% Growth / 1.5% Efficiency	10,417	21,905	35,038	739	1,587	2,554	904	1,916	3,096	128	271	433	554	1,192	1,910
3.8% Growth / 2% Efficiency	8,265	17,103	26,988	601	1,275	2,024	751	1,564	2,491	101	211	333	442	940	1,486
3.8% Growth / 2.5% Efficiency	6,175	12,552	19,545	468	980	1,533	602	1,231	1,932	75	154	239	333	701	1,094
4.3% Growth / 1.5% Efficiency	12,694	27,095	43,925	884	1,925	3,142	1,068	2,299	3,768	157	336	545	673	1,464	2,380
4.3% Growth / 2% Efficiency	10,469	22,007	35,190	743	1,595	2,567	910	1,926	3,112	129	272	435	557	1,197	1,919
4.3% Growth / 2.5% Efficiency	8,308	17,187	27,114	605	1,282	2,035	756	1,574	2,505	102	212	334	444	945	1,493

CAPACITY FORECASTS: SCENARIO TESTING
WITH COMMITMENTS

TABLE 6: CAPACITY BY CENTRE, EALING BOROUGH COUNCIL (SQ M NET)

SCENARIO	EALING TOWN CENTRE			SOUTHALL TOWN CENTRE			ACTON TOWN CENTRE			HANWELL TOWN CENTRE			GREENFORD TOWN CENTRE		
	2011	2016	2021	2011	2016	2021	2011	2016	2021	2011	2016	2021	2011	2016	2021
3.8% Growth / 1.5% Efficiency	320	10,420	21,973	-48	1,999	4,339	785	1,779	2,940	54	188	340	-172	363	967
3.8% Growth / 2% Efficiency	-1,587	6,168	14,851	-376	1,252	3,065	634	1,434	2,346	29	132	246	-266	151	610
3.8% Growth / 2.5% Efficiency	-3,438	2,140	8,267	-695	544	1,888	488	1,108	1,798	5	79	159	-358	-50	279
4.3% Growth / 1.5% Efficiency	2,252	14,928	29,748	62	2,516	5,392	944	2,154	3,599	80	248	443	-78	587	1,356
4.3% Growth / 2% Efficiency	280	10,423	22,020	-271	1,741	4,040	789	1,788	2,955	54	189	341	-176	362	968
4.3% Growth / 2.5% Efficiency	-1,635	6,156	14,875	-594	1,007	2,790	638	1,442	2,359	29	132	247	-270	149	610

CAPACITY FORECASTS: SCENARIO TESTING NO COMMITMENTS

TABLE 7: CAPACITY BY CENTRE, HAMMERSMITH & FULHAM BOROUGH COUNCIL (SQ M NET)

SCENARIO	HAMMERSMITH TOWN CENTRE			FULHAM TOWN CENTRE			SHEPHERD'S BUSH TOWN CENTRE		
	2011	2016	2021	2011	2016	2021	2011	2016	2021
3.8% Growth / 1.5% Efficiency	7,284	15,491	25,094	3,149	6,652	10,773	3,571	7,555	12,337
3.8% Growth / 2% Efficiency	6,115	12,787	20,405	2,643	5,484	8,749	3,109	6,451	10,361
3.8% Growth / 2.5% Efficiency	4,980	10,225	16,070	2,151	4,377	6,878	2,660	5,405	8,534
4.3% Growth / 1.5% Efficiency	8,537	18,442	30,316	3,691	7,926	13,025	4,073	8,772	14,554
4.3% Growth / 2% Efficiency	7,328	15,578	25,228	3,168	6,689	10,830	3,595	7,603	12,410
4.3% Growth / 2.5% Efficiency	6,154	12,865	20,524	2,660	5,517	8,800	3,131	6,494	10,428

CAPACITY FORECASTS: SCENARIO TESTING WITH COMMITMENTS

TABLE 8: CAPACITY BY CENTRE, HAMMERSMITH & FULHAM BOROUGH COUNCIL (SQ M NET)

SCENARIO	HAMMERSMITH TOWN CENTRE			FULHAM TOWN CENTRE			SHEPHERD'S BUSH TOWN CENTRE		
	2011	2016	2021	2011	2016	2021	2011	2016	2021
3.8% Growth / 1.5% Efficiency	3,027	10,514	19,279	1,802	5,095	8,973	4,252	24,416	48,293
3.8% Growth / 2% Efficiency	1,961	8,049	15,003	1,329	4,002	7,078	1,621	18,251	37,460
3.8% Growth / 2.5% Efficiency	926	5,713	11,050	869	2,966	5,325	-934	12,410	27,445
4.3% Growth / 1.5% Efficiency	4,134	13,170	24,005	2,299	6,277	11,073	7,811	31,898	61,119
4.3% Growth / 2% Efficiency	3,032	10,559	19,366	1,809	5,119	9,016	5,090	25,367	49,365
4.3% Growth / 2.5% Efficiency	1,962	8,085	15,076	1,334	4,022	7,114	2,448	19,179	38,497

CAPACITY FORECASTS: SCENARIO TESTING
NO COMMITMENTS

TABLE 9: CAPACITY BY CENTRE, HOUNSLOW BOROUGH COUNCIL (SQ M NET)

SCENARIO	HOUNSLOW TOWN CENTRE			CHISWICK TOWN CENTRE			FELTHAM TOWN CENTRE			BRENTFORD TOWN CENTRE		
	2011	2016	2021	2011	2016	2021	2011	2016	2021	2011	2016	2021
3.8% Growth / 1.5% Efficiency	5,299	11,452	18,418	2,898	6,139	9,848	2,806	5,929	9,601	754	1,599	2,561
3.8% Growth / 2% Efficiency	4,289	9,161	14,528	2,327	4,856	7,684	496	1,087	1,717	601	1,256	1,985
3.8% Growth / 2.5% Efficiency	3,308	6,990	10,932	1,773	3,640	5,682	366	803	1,251	453	931	1,452
4.3% Growth / 1.5% Efficiency	6,372	13,937	22,727	3,503	7,528	12,243	771	1,713	2,779	916	1,970	3,198
4.3% Growth / 2% Efficiency	5,328	11,510	18,506	2,913	6,169	9,893	633	1,395	2,232	758	1,607	2,572
4.3% Growth / 2.5% Efficiency	4,313	9,210	14,603	2,340	4,881	7,722	499	1,093	1,725	604	1,262	1,994

CAPACITY FORECASTS: SCENARIO TESTING
WITH COMMITMENTS

TABLE 10: CAPACITY BY CENTRE, HOUNSLOW BOROUGH COUNCIL (SQ M NET)

SCENARIO	HOUNSLOW TOWN CENTRE			CHISWICK TOWN CENTRE			FELTHAM TOWN CENTRE			BRENTFORD TOWN CENTRE		
	2011	2016	2021	2011	2016	2021	2011	2016	2021	2011	2016	2021
3.8% Growth / 1.5% Efficiency	4,647	12,537	21,471	972	3,916	7,287	-734	602	2,066	17	767	1,623
3.8% Growth / 2% Efficiency	3,347	9,590	16,469	448	2,740	5,304	-972	68	1,171	-118	464	1,113
3.8% Growth / 2.5% Efficiency	2,084	6,797	11,844	-61	1,625	3,471	-1,203	-438	343	-249	177	642
4.3% Growth / 1.5% Efficiency	5,823	15,475	26,691	1,511	5,173	9,463	-646	984	2,822	154	1,088	2,180
4.3% Growth / 2% Efficiency	4,486	12,370	21,293	969	3,927	7,311	-887	429	1,870	14	767	1,626
4.3% Growth / 2.5% Efficiency	3,187	9,428	16,302	443	2,746	5,322	-1,121	-96	989	-121	463	1,115

APPENDIX 15:

CONVENIENCE AND COMPARISON GOODS FLOORSPACE SCHEDULES

COMPARISON GOODS
FLOORSPACE SCHEDULE: OUT OF CENTRE

Comparison Goods Floorspace	Gross (sq m)	Net (sq m)
LB Hounslow		
Currys, Hounslow	1,130	904
Halfords, Hounslow	1,139	911
B&Q, Chiswick	4,598	3,679
Currys, Apex Retail Park, Hanworth	1,215	972
Wickes, Apex Retail Park, Hanworth	2,526	2,021
Homebase, Feltham	3,509	2,807
Carpetright, Brentford	814	651
Currys, Brentford	3,045	2,436
Comet, Brentford	528	422
Homebase, Brentford	4,248	3,398
PC World	3,437	2,750
Pets @ Home	1,307	1,046
MFI, Ivy Bridge Retail Park	1,859	1,487
Currys, Ivy Bridge Retail Park	932	745
JJB Sports, Ivy Bridge Retail Park	946	757
Halfords, Ivy Bridge Retail Park	932	746
Comet, Ivy Bridge Retail Park	1,530	1,224
Toys R Us	3,179	2,543
Pets @ Home, Manor Lane Retail Park, Feltham	710	568
Carpetright, Manor Lane Retail Park, Feltham	820	656
Tile and Bath World, Manor Lane Retail Park, Felthan	400	320
Halfords, Chiswick	1,000	800
TOTAL	**39,803**	**31,842**
LB Hammersmith & Fulham		
Currys, Hurlingham Retail Park	2,787	2,230
PC World, Hurlingham Retail Park	1,914	1,531
TOTAL	**4,701**	**3,761**
LB Ealing		
Wickes, Boston RD	3,183	2,547
Carpets, Great Western Retail Park	1,023	818
Crurrys, Great Western Retail Park	926	741
Topps Tiles, Great Western Retail Park	279	223
Matalan, Great Western Retail Park	4,032	3,225
Homebase, Acton	3,303	2,642
Vacant (Former B&Q Unit)	4,106	3,285
TOTAL	**16,852**	**13,481**

COMPARISON GOODS
FLOORSPACE SCHEDULE: TOWN CENTRES

Comparison Goods Floorspace	Gross (sqm)	Net (sqm)
LB Hounslow		
Hounslow	36,489	23,718
Chiswick	20,016	13,010
Feltham	15,098	9,814
Brentford	3,265	2,122
Hounslow West	2,189	1,423
Bedfont	1,350	878
Old Isleworth	208	135
Heston	383	249
Cranford	269	175
Hanworth	462	300
Isleworth	422	274
TOTAL	**80,151**	**52,098**
LB Hammersmith & Fulham		
Hammersmith	23,790	15,464
Fulham	13,490	8,769
Shepherds Bush	12,100	7,865
East Acton	661	430
Bloemfontein Road	157	102
Uxbridge Road West	1,787	1,162
Uxbridge Road East	795	517
Edward Woods Estate	397	258
Askew Road	1,082	703
Goldhawk Road	205	133
Shepherd's Bush Road	1,303	847
Blythe Road	309	201
North End Road (West Kensington)	1,087	707
Greyhound Road	749	487
Fulham Cross / Munster Road	1,930	1,255
Fulham Palace Road (Central)	389	253
Fulham High Street	2,971	1,931
Fulham Road	3,920	2,548
Parson's Green	2,484	1,615
Wandsworth Bridge Road (North)	789	513
King Street West	3,957	2,572
Dawes Road	468	304
TOTAL	**74,820**	**48,633**
LB Ealing		
Ealing	59,175	38,464
Hanwell	10,135	6,588
Southall	25,624	16,656
Acton	10,591	6,884
Greenford	8,826	5,737
East Acton	5,093	3,310
Northfields	2,585	1,680
Northolt	669	435
Perivale	608	395
Pitshanger	1,067	693
South Ealing	4,436	2,883
Sudbury Hill	256	166
Park Royal	1,103	717
West Way Cross	8,052	5,234
TOTAL	**138,220**	**89,843**

CONVENIENCE GOODS
FLOORSPACE SCHEDULE: EALING BOROUGH COUNCIL

EALING CONVENIENCE RETAIL PROVISION

	Net Flsp sq m	Net Con Ration (%)	Net Convenience (sq m)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
EALING - TOWN CENTRE FLOORSPACE					
Tesco Express, The Parade	186	95	177	12,435	2,197
Budgens, New Broadway	137	95	130	3,315	431
Budgens, The Station	106	95	101	3,315	334
Sainsburys, Melbourne Avenue	2,079	80	1,663	10,152	16,885
Waitrose, Alexandria Road	1,579	80	1,263	10,565	13,346
M&S, The Broadway	836	95	794	9,641	7,657
Iceland, New Broadway	535	95	508	4,717	2,397
Sainsbury's Local, Ealing Broadway	264	95	251	10,152	2,546
Other	3,986	95	3,787	3,000	11,360
SUB-TOTAL	**9,708**		**8,674**	**6,589**	**57,154**
HANWELL - TOWN CENTRE FLOORSPACE					
Lidl, Uxbridge Road	793	95	753	2,826	2,129
Other	844	95	802	3,000	2,405
SUB-TOTAL	**1,637**		**1,555**	**2,916**	**4,534**
SOUTHALL - TOWN CENTRE FLOORSPACE					
Iceland, South Road	450	95	428	4,717	2,017
Somerfield, The Broadway	513	95	487	5,391	2,627
Other	6,444	95	6,122	3,000	18,365
SUB-TOTAL	**7,407**		**7,037**	**3,270**	**23,009**
ACTON - TOWN CENTRE FLOORSPACE					
Morrisons, King Street	2,494	80	1,995	11,130	22,207
Iceland, The Oaks Shopping Centre	474	95	450	4,717	2,124
Netto, The Oaks Shopping Centre	475	95	451	2,978	1,344
Other	2,655	80	2,124	3,000	6,372
SUB-TOTAL	**6,098**		**5,021**	**6,383**	**32,046**
GREENFORD - TOWN CENTRE FLOORSPACE					
Tesco Metro, Greenford Road	1,161	85	987	12,435	12,271
Other	2,281	95	2,167	3,000	6,501
SUB-TOTAL	**3,442**		**3,154**	**5,952**	**18,772**
PARK ROYAL - TOWN CENTRE FLOORSPACE					
Asda, Western Road	5,413	80	4,330	13,228	57,283
Other	122	95	116	3,000	348
SUB-TOTAL	**5,535**		**4,446**	**12,961**	**57,630**
EAST ACTON - TOWN CENTRE FLOORSPACE					
Other	577	95	548	3,000	1,644
SUB-TOTAL	**577**		**548**	**3,000**	**1,644**
NORTHFIELDS - TOWN CENTRE FLOORSPACE					
NorthfieldsTesco Express, Northfield Ave.	245	95	233	12,435	2,894
Other	812	95	771	3,000	2,314
SUB-TOTAL	**1,057**		**1,004**	**5,187**	**5,208**
PITSHANGER					
Welcome Co-op, 107-109 Pitshanger Lane	128	95	122	5,239	637
Other	543	95	516	3,000	1,548
SUB-TOTAL	**671**		**637**	**3,427**	**2,185**
SOUTH EALING - TOWN CENTRE FLOORSPACE					
Co-Op, The Woodlands, South Ealing Road	274	95	260	5,239	1,364
Sainsbury's Local, South Ealing Road	279	95	265	10,152	2,691
Other	1,000	95	950	3,000	2,850
SUB-TOTAL	**1,553**		**1,475**	**4,680**	**6,904**
NORTHOLT - TOWN CENTRE FLOORSPACE					
Co-op, Church Road	184	95	175	5,239	916
Other	120	95	114	3,000	342
SUB-TOTAL	**304**		**289**	**4,355**	**1,258**
PERIVALE - TOWN CENTRE FLOORSPACE					
Other	406	95	386	3,000	1,157
SUB-TOTAL	**406**		**386**	**3,000**	**1,157**
SUDBURY HILL - TOWN CENTRE FLOORSPACE					
Iceland, Greenford Road	453	95	430	4,717	2,030
Other	277	95	263	3,000	789
SUB-TOTAL	**730**		**694**	**4,065**	**2,819**
WEST WAY CROSS - TOWN CENTRE FLOORSPACE					
Other	0	0	0	3,000	0
SUB-TOTAL	**0**		**0**	**0**	**0**
OUT OF CENTRE FLOORSPACE					
Tesco Express, Ealing Common	234	95	222	12,435	2,764
Tesco, Old Hoover Building	3,471	80	2,777	12,435	34,530
Tesco Express, Church Road, Northolt	225	95	214	12,435	2,658
SUB-TOTAL	**3,930**		**3,213**	**12,435**	**39,952**
TOTAL	**43,055**		**38,133**	**6,668**	**254,274**

Note: Other includes small local stores such as bakers, butchers, Londis, Costcutter and other general convenience stores

CONVENIENCE GOODS
FLOORSPACE SCHEDULE: HAMMERSMITH & FULHAM BOROUGH COUNCIL

	Net Flsp sq m	Net Con Ration (%)	Net Convenience (sq m)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
HAMMERSMITH - TOWN CENTRE FLOORSPACE					
Iceland, King Street	463	95	440	4,717	2,075
Tesco Metro, Broadway Shopping Centre	664	95	631	12,435	7,844
Sainsbury's, Kings Mall	1,730	80	1,384	10,152	14,050
M&S, King Street	836	95	794	9,641	7,657
Other	51	95	48	3,000	145
SUB-TOTAL	**3,744**		**3,297**	**9,636**	**31,771**
FULHAM - TOWN CENTRE FLOORSPACE					
Somerfield, North End Road	1,013	85	861	5,391	4,642
Sainsbury's Central, Shopping Centre	1,238	85	1,052	10,152	10,683
Sainsbury's, North End Road	163	95	155	10,152	1,572
Waitrose, North End Road	1,635	80	1,308	10,565	13,819
M&S, Jerdan Place	186	95	177	9,641	1,704
Iceland, North End Road	440	95	418	4,717	1,972
Other	967	95	919	3,000	2,756
SUB-TOTAL	**5,642**		**4,890**	**7,597**	**37,147**
SHEPHERD'S BUSH - TOWN CENTRE FLOORSPACE					
Tesco Express, Goldhawk Road	177	95	168	12,435	2,091
Morrisons, West 12 Shopping Centre	2,197	80	1,758	11,130	19,562
M&S, Shepherd's Bush Green	52	95	49	9,641	476
Budgens, Uxbridge Road	94	95	89	3,315	296
Sainsbury's Local, Uxbridge Road	295	95	280	10,152	2,845
Other	1,839	95	1,747	3,000	5,241
SUB-TOTAL	**4,654**		**4,092**	**7,457**	**30,512**
NORTH END RD/WEST KENSINGTON - TOWN CENTRE FLOORSPACE					
Tesco Express, North End Road	186	95	177	12,435	2,197
Other	1,003	95	953	3,000	2,859
SUB-TOTAL	**1,189**		**1,130**	**4,476**	**5,056**
EAST ACTON - TOWN CENTRE FLOORSPACE					
Iceland, Old Oak Common Lane	424				
Other	97	95	92	3,000	276
SUB-TOTAL	**521**		**92**	**3,000**	**276**
BLOEMFONTEIN ROAD - TOWN CENTRE FLOORSPACE					
Other	255	95	242	3,000	727
SUB-TOTAL	**255**		**242**	**3,000**	**727**
UXBRIDGE ROAD WEST - TOWN CENTRE FLOORSPACE					
Other	779	95	740	3,000	2,220
SUB-TOTAL	**779**		**740**	**3,000**	**2,220**
UXBRIDGE ROAD EAST - TOWN CENTRE FLOORSPACE					
Other	1,340	95	1,273	3,000	3,819
SUB-TOTAL	**1,340**		**1,273**	**3,000**	**3,819**
EDWARDS WOODS ESTATE					
Other	358	95	340	3,000	1,020
SUB-TOTAL	**358**		**340**	**3,000**	**1,020**
ASKEW ROAD - TOWN CENTRE FLOORSPACE					
Other	735	95	698	3,000	2,095
SUB-TOTAL	**735**		**698**	**3,000**	**2,095**
GOLDHAWK ROAD - TOWN CENTRE FLOORSPACE					
Other	374	95	355	3,000	1,066
SUB-TOTAL	**374**		**355**	**3,000**	**1,066**
SHEPHERD'S BUSH ROAD - TOWN CENTRE FLOORSPACE					
Other	368	95	350	3,000	1,049
SUB-TOTAL	**368**		**350**	**3,000**	**1,049**
BLYTHE ROAD - TOWN CENTRE FLOORSPACE					
Other	160	95	152	3,000	456
SUB-TOTAL	**160**		**152**	**3,000**	**456**
GREYHOUND ROAD - TOWN CENTRE FLOORSPACE					
Sainsburys, Fulham Palace Road	279	95	265	10,152	2,691
Other	99	95	94	3,000	282
SUB-TOTAL	**378**		**359**	**8,279**	**2,973**
MUNSTER ROAD/FULHAM CROSS - TOWN CENTRE FLOORSPACE					
Budgens	213	95	202	3,315	671
Other	128	95	122	3,000	365
SUB-TOTAL	**341**		**324**	**3,197**	**1,036**
FULHAM PALACE ROAD (CENTRAL) - TOWN CENTRE FLOORSPACE					
Other	191	95	181	3,000	544
SUB-TOTAL	**191**		**181**	**3,000**	**544**
FULHAM HIGH STREET - TOWN CENTRE FLOORSPACE					
Other	175	95	166	3,000	499
SUB-TOTAL	**175**		**166**	**3,000**	**499**
FULHAM ROAD - TOWN CENTRE FLOORSPACE					
Other	296	95	281	3,000	844
SUB-TOTAL	**296**		**281**	**3,000**	**844**
PARSONS GREEN - TOWN CENTRE FLOORSPACE					
Budgens	242	95	230	3,315	762
Other	353	95	335	3,000	1,006
SUB-TOTAL	**595**		**565**	**3,128**	**1,768**
WANDSWORTH BRIDGE ROAD (NORTH) - TOWN CENTRE FLOORSPACE					
Other	214	95	203	3,000	610
SUB-TOTAL	**214**		**203**	**3,000**	**610**
KING STREET WEST - TOWN CENTRE FLOORSPACE					
Tesco Express	200	95	190	12,435	2,363
Other	1,315	95	1,249	3,000	3,748
SUB-TOTAL	**1,515**		**1,439**	**4,246**	**6,110**
DAWES ROAD - TOWN CENTRE FLOORSPACE					
Other	131	95	124	3,000	373
SUB-TOTAL	**131**		**124**	**3,000**	**373**
OUT OF CENTRE FLOORSPACE					
Tesco, 180 Shepherd's Bush Road (near Hammersmith)	2,717	80	2,174	12,435	27,029
Tesco Express, 335/337 Fulham Palace Road	174	95	165	12,435	2,056
M&S Simply Food, Imperial Wharf, Townend Road	200	95	190	9,641	1,832
Tesco Express, Kings Road	197	95	187	12,435	2,327
Sainsburys, Townmead Road (near Fulham)	3,160	80	2,528	10,152	25,664
SUB-TOTAL	**6,448**		**5,244**	**11,233**	**58,907**
TOTAL	**30,403**		**26,539**	**7,192**	**190,879**

CONVENIENCE GOODS
FLOORSPACE SCHEDULE: HOUNSLOW BOROUGH COUNCIL

	Net Flsp sq m	Net Con Ration (%)	Net Convenience (sq m)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
HOUNSLOW - TOWN CENTRE FLOORSPACE					
M&S, High Street	836	95	794	9,641	7,657
Tesco, High Street	331	95	314	12,435	3,910
Iceland, High Street	297	95	282	4,717	1,331
Other	625	95	594	3,000	1,781
SUB-TOTAL	**2,089**		**1,985**	**7,397**	**14,679**
CHISWICK - TOWN CENTRE FLOORSPACE					
Sainsbury's, Essex Place	3,603	80	2,882	10,152	29,262
Tesco Express, Chiswick High Road	141	95	134	12,435	1,666
Sainsbury's Local, Chiswick High Road	254	95	241	10,152	2,450
M&S Simply Food, Chiswick High Road	836	95	794	9,641	7,657
Other	2,531	95	2,404	3,000	7,213
SUB-TOTAL	**7,365**		**6,456**	**7,473**	**48,248**
FELTHAM - TOWN CENTRE FLOORSPACE					
Asda, Tilley Road	4,840	80	3,872	13,228	51,219
Lidl, Hounslow Roa	836	95	794	2,826	2,244
Tesco, High Street	2,401	80	1,921	12,435	23,885
Aldi, High Street	754	95	716	4,109	2,943
Other	736	95	699	3,000	2,098
SUB-TOTAL	**9,567**		**8,003**	**10,295**	**82,389**
BRENTFORD - TOWN CENTRE FLOORSPACE					
Somerfield, High Street	1,933	80	1,546	5,391	8,337
Other	875	95	831	3,000	2,494
SUB-TOTAL	**2,808**		**2,378**	**4,555**	**10,830**
HOUNSLOW WEST - TOWN CENTRE FLOORSPACE					
Iceland, Bath Road	615	95	584	4,717	2,756
Somerfield, Bath Road	2,055	80	1,644	5,391	8,863
Other	1,634	80	1,307	3,000	3,922
SUB-TOTAL	**4,304**		**3,535**	**4,396**	**15,540**
BEDFONT - TOWN CENTRE FLOORSPACE					
Budgens, Staines Road	502	95	477	3,315	1,581
Other	363	95	345	3,000	1,035
SUB-TOTAL	**865**		**822**	**3,183**	**2,615**
OLD ISLEWORTH - TOWN CENTRE FLOORSPACE					
Other	244	95	232	3,000	695
SUB-TOTAL	**244**		**232**	**3,000**	**695**
HESTON - TOWN CENTRE FLOORSPACE					
Other	330	95	314	3,000	941
SUB-TOTAL	**330**		**314**	**3,000**	**941**
CRANFORD					
Tesco Express, Bath Road	367	**95**	349	**12,435**	4,335
Other	320	95	304	3,000	912
SUB-TOTAL	**687**		**653**	**8,040**	**5,247**
HANWORTH - TOWN CENTRE FLOORSPACE					
Other	351	95	333	3,000	1,000
SUB-TOTAL	**351**		**333**	**3,000**	**1,000**
ISLEWORTH - TOWN CENTRE FLOORSPACE					
Other	711	95	675	3,000	2,026
SUB-TOTAL	**711**		**675**	**3,000**	**2,026**
OUT OF CENTRE FLOORSPACE					
Tesco, Syon Lane, Osterley	4,704	80	3,763	12,435	46,795
Tesco, Dukes Green Avenue	3,680	80	2,944	12,435	36,609
Tesco Extra, Bulls Bridge Industrial Estate Hayes Road, (Southall)	5,415	80	4,332	12,435	53,868
Tesco Extra, Mogden Lane, Twickenham	4,608	80	3,686	1,245	4,590
Tesco Express, London Road, Isleworth	200	95	190	12,435	2,363
Tesco Express, Bear Road, Hanworth	186	95	177	12,435	2,197
Aldi, Hopsital Road	250	95	238	4,109	976
SUB-TOTAL	**19,043**		**15,330**	**9,615**	**147,398**
TOTAL	**48,364**		**40,715**	**8,145**	**331,610**

APPENDIX 16:

COMPARISON GOODS: IMPLICATIONS OF KEY PROPOSALS AND COMMITMENTS ON MARKET SHARE

WEST LONDON RETAIL NEEDS STUDY 2006
EALING / HAMMERSMITH & FULHAM / HOUNSLOW

COMPARISON GOODS CAPACITY FORECASTING:-
CHANGES TO MARKET SHARE FOLLOWING
IMPLEMENTATION OF KEY ROPOSALS AND COMMITMENTS

TABLE 1: WEST LONDON AUTHORITIES: CHANGE TO MARKET SHARE GLOBAL

	2011
Total Available Comparison Goods Expenditure Zone 1-30 (£000)	6,696.0
Total Trade Draw from Zone 1-30 to West London Authorities - Baseline (£000)	1,627.0
Market Share: Baseline (%)	24.3
Total Trade Draw from Zone 1-30 to West London Authorities - Following Key Proposals and Commitments (£000)	2,041.4
Market Share 2011: With Proposals and Commitments (%)	30.5

Note: Assumes 4.3% Expenditure Growth Rate
and 2% Sales Efficiency

Note: Includes turnover of 12 major town centres and all out-of-centre floorspace

WEST LONDON RETAIL NEEDS STUDY 2006

EALING / HAMMERSMITH & FULHAM / HOUNSLOW

COMPARISON GOODS CAPACITY FORECASTING:-
CHANGES TO MARKET SHARE FOLLOWING
IMPLEMENTATION OF KEY ROPOSALS AND COMMITMENTS

TABLE 2: WEST LONDON AUTHORITIES: CHANGE TO MARKET SHARE BY BOROUGH

	LB EALING 2011	LB HAMMERSMITH & FULHAM 2011	LB HOUNSLOW 2011
Total Trade Draw **from Zone 1-30** to West London Authorities - Baseline (£m)	622.8	433.0	571.3
Market Share Within Zone 1-30: Baseline (%)	9.3	6.5	8.5
Total Trade Draw **from Zone 1-30** to West London Authorities - Following Key Proposals and Commitments (£m)	605.4	803.9	632.1
Market Share Within Zone 1-30: With Proposals and Commitments (%)	9.0	12.0	9.4
Total Trade Draw **from Borough Zones** to West London Authorities - Baseline (£m) - **See Note A**	493.2	261.4	353.8
Market Share Within Borough Zones: Baseline (%)	43.0	31.0	41.5
Total Trade Draw **from Borough Zones** to West London Authorities - Following Key Proposals and Commitments (£m) - **See Note A**	470.4	364.3	420.2
Market Share Within Borough Zones With Proposals and Commitments (%)	40.9	43.2	49.3

Note: Assumes 4.3% Expenditure Growth Rate and 2% Sales Efficiency

Note: Includes turnover of 12 major town centres and all out-of-centre floorspace

Note A: Zone 4-10 is a best fit boundary to the London Borough of Ealing
Zone 1-3 is a best fit boundary to the London Borough of Hammersmith & Fulham
Zone 11-17 is a best fit boundary to the London Borough of Hounslow

WEST LONDON RETAIL NEEDS STUDY 2006

EALING / HAMMERSMITH & FULHAM / HOUNSLOW

COMPARISON GOODS CAPACITY FORECASTING:-

TABLE 3: LONDON BOROUGH OF EALING: CHANGE TO MARKET SHARE BY CENTRE

	EALING 2011	SOUTHALL 2011	ACTON 2011	HANWELL 2011	GREENFORD 2011
Total Trade Draw **from Zone 1-30** to Town Centre - Baseline (£m)	460.2	32.5	35.8	5.9	27.7
Market Share Within Zone 1-30: Baseline (%)	6.9	0.5	0.5	0.1	0.4
Total Trade Draw **from Zone 1-30** to Town Centre - Following Key Proposals and Commitments (£m)	407.8	73.4	34.9	5.5	23.3
Market Share Within Zone 1-30: With Proposals and Commitments (%)	6.1	1.1	0.5	0.1	0.3
Total Trade Draw **from Borough Zones** to Town Centre - Baseline (£m) - **See Note A**	408.0	17.0	13.9	4.2	24.2
Market Share Within Borough Zones: Baseline (%)	35.4	1.5	1.2	0.4	2.1
Total Trade Draw **from Borough Zones** to Town Centre - Following Key Proposals and Commitments (£m) - **See Note A**	370.9	36.4	13.3	4.2	19.8
Market Share Within Borough Zones With Proposals and Commitments (%)	32.2	3.2	1.2	0.4	1.7

Note: Assumes 4.3% Expenditure Growth Rate and 2% Sales Efficiency

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

WEST LONDON RETAIL NEEDS STUDY 2006
EALING / HAMMERSMITH & FULHAM / HOUNSLOW

COMPARISON GOODS CAPACITY FORECASTING:-

TABLE 4: LONDON BOROUGH OF HAMMERSMITH & FULHAM CHANGE TO MARKET SHARE BY CENTRE

	HAMMERSMITH 2011	**FULHAM 2011**	**SHEPHERD'S BUSH 2011**
Total Trade Draw **from Zone 1-30** to Town Centre - Baseline (£m)	225.8	105.8	83.7
Market Share Within Zone 1-30: Baseline (%)	3.4	1.6	1.3
Total Trade Draw **from Zone 1-30** to Town Centre - Following Key Proposals and Commitments (£m)	210.7	99.3	476.3
Market Share Within Zone 1-30: With Proposals and Commitments (%)	3.1	1.5	7.1
Total Trade Draw **from Borough Zones** to Town Centre - Baseline (£m) - **See Note A**	149.7	76.2	30.5
Market Share Within Borough Zones: Baseline (%)	17.8	9.0	3.6
Total Trade Draw **from Borough Zones** to Town Centre - Following Key Proposals and Commitments (£m) - **See Note A**	139.2	69.8	150.4
Market Share Within Borough Zones With Proposals and Commitments (%)	16.5	8.3	17.8

Note: Assumes 4.3% Expenditure Growth Rate and 2% Sales Efficiency

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

WEST LONDON RETAIL NEEDS STUDY 2006
EALING / HAMMERSMITH & FULHAM / HOUNSLOW

COMPARISON GOODS CAPACITY FORECASTING:-

TABLE 5: LONDON BOROUGH OF HOUNSLOW CHANGE TO MARKET SHARE BY CENTRE

	HOUNSLOW 2011	**FELTHAM 2011**	**CHISWICK 2011**	**BRENTFORD 2011**
Total Trade Draw **from Zone 1-30** to Town Centre - Baseline (£m)	252.5	31.4	136.7	35.1
Market Share Within Zone 1-30: Baseline (%)	3.8	0.5	2.0	0.5
Total Trade Draw **from Zone 1-30** to Town Centre - Following Key Proposals and Commitments (£m)	308.3	52.7	124.8	30.8
Market Share Within Zone 1-30: With Proposals and Commitments (%)	4.6	0.8	1.9	0.5
Total Trade Draw **from Borough Zones** to Town Centre - Baseline (£m) - **See Note A**	179.6	26.4	66.6	15.8
Market Share Within Borough Zones: Baseline (%)	21.1	3.1	7.8	1.9
Total Trade Draw **from Borough Zones** to Town Centre - Following Key Proposals and Commitments (£m) - **See Note A**	232.1	45.0	63.0	14.6
Market Share Within Borough Zones With Proposals and Commitments (%)	27.2	5.3	7.4	1.7

Note: Assumes 4.3% Expenditure Growth Rate and 2% Sales Efficiency

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

APPENDIX 17:

ETHNIC RETAILING BACKGROUND PAPER

CONTENTS

1. ETHNIC RETAILING

Introduction

1.1 Britain's Black and Ethnic Minority (BME)[1] businesses now form an important part of Britain's retail business landscape. Minority enterprises range from the corner shop and take-aways, to established "ethnic quarters", such as Manchester's 'Curry Mile' in Rusholme, London's 'Brick Lane', Birmingham's 'Balti District' and the various Chinatowns.

> *"The strength of London's Asian business community is of great importance to London's economic success".*
>
> Mayor of London

> *"The 39,000 Asian businesses in London….are not only creating jobs and contributing to the enterprise culture, they are also an important source of innovation which is so critical in a modern economy. The introduction of new ideas, products, processes and services is undoubtedly enhanced by the cultural diversity which we are now experiencing so keenly in the capital".*
>
> Chairman Asian Business Association, London Chamber of Commerce & Industry

1.2 This review draws on recent research conducted on the scale and significance of BME retail businesses in the UK and the issues that they are facing[1/2/3]. It specifically examines the extent to which local authorities can promote the sustainable growth and viability of BME retail activities as part of wider policy and regeneration initiatives.

Why is Ethnic Retailing Important?

1.3 Retailing is now one of the UK's largest industries and is now larger than Britain's manufacturing sector. Recent figures indicate that retail sales in the UK reached over £246bn in 2004, larger than the combined economies of Switzerland and Ireland[3]. There are 184,700 different businesses operating c.278,630 shops in the UK, and the sector employs c.3.1m people, or 11% of the working population.

[1] BME comprises Afro-Caribbean, African, Mixed, Indian, Pakistani and Bangladeshi, Chinese, West Asian and 'Others' based on ONS definition, extended using a GLA classification (2005)
[2] Centre for Retail Research (2006*) Diversity in Shopping: A Report on UK Black and Minority Ethnic Retail Businesses'*, Joshua Bamfield: Nottingham.
[3] House of Commons (2006) *High Street Britain: 2015*, All-Party Parliamentary Small Shops Group.

1.4 Small and medium-sized (SME) retail businesses are important to the UK economy in terms of providing employment, investment, diversity and innovation. Of the total 278,639 shops in the UK almost half are owned and managed by a sole trader and a further 103,000 employ less than five people. Small shops employ c.64% of all employees in the sector and provide more jobs per sales than large retailers.

1.5 In turn, BME owned businesses[4] are an important part of the SME retail sector and are important to Britain's retail industry for a number of reasons:

- Almost 8% of the UK population was classified as being from BME communities based on the 2001 Census, which is equivalent to over 4.6 million people out of a total population of some 54 million.
- Of those classified as being from a BME group, over 50% were of Asian or Asian British extraction.
- There are significant concentrations of BME communities in UK urban areas. For example, over two-thirds of Southall's population are classified as Asian.
- The retail sector is more accessible to the BME community than other business sectors and is important for the creation of jobs, training and the development of enterprise skills. Research shows that the BME community is highly entrepreneurial, with new business start-ups rising from 32,000 to circa 50,000 between 2000 –2004.
- Current large-scale businesses (e.g. Tesco, M&S, etc.) all started as SME retailers. A vibrant SME sector is therefore necessary to act as a seedbed for the major new retail concepts of the future and a thriving BME retail sector is likely to contribute to the creation of new large-scale retail multiples (such as, for example, Tom Singh's New Look chain).
- Communities contain groups of people with diverse demands and needs. Small shops are well placed to understand their customers and can respond to these needs by tailoring their offer and services. For example, the Muslim population often relies on small shops to purchase 'halal' meat.

1.6 The estimated number of BME retail businesses in the SME sector is set out in the following table.

Table 6.1: Estimated Number of BME Retailer Businesses, 2006

	London	Rest of UK	UK Total	London as % of UK
Black	2,200	2,700	4,900	45%
Asian	16,100	33,000	49,100	33%

[4] Defined as those having 50% or more of the business owned by people who are of BME origin

Other	5,000	9,050	14,050	36%
TOTAL	23,300	44,750	68,050	34%

GLA Economics (June 2005)

1.7 There are currently more than 68,000 BME retailers in the UK and almost 4,000 BME wholesalers, with a combined turnover of c.£33billion; equivalent to almost 12% of UK sales, and employing over 373,000 in 2005/06,

1.8 Some 72% of the 68,050 BME independent retailers are Asian-owned. Research by the GLA[1] indicates that there were 39,000 distinct Asian businesses in London in 2004 that employ one or more staff, representing 14% of all London businesses.

1.9 In the UK as a whole, Asian retailers account for around 75% of all independently owned retail outlets, rising to 95% within the M25 and other major metropolitan areas[5]. Indeed, people of South Asian origin are reported to contribute more than £5bn annually to the British economy[3]. The downside of having such a large presence in one sector is that Asian-owned businesses are particularly impacted by trends in the retail sector.

Changes in UK Retailing: SME/BME Retail Sectors

1.10 The issues and challenges facing the SME and BME retail sectors need to be considered in the context of the dynamic changes in the urban and retail landscape over the last 20-30 years.

1.11 One of the key trends has been the consolidation of turnover and market share into a handful of major multiples, particularly in the grocery sector. Research indicates that of the c.£76bn spent on food today, more that 80% goes to supermarkets. Asda Walmart is now one of the world's largest companies by turnover and Tesco is reported to take one in every eight pounds spent in the UK.

1.12 As a result, the smaller independent shops are struggling to compete with the critical mass, buying power and more aggressive pricing policies of the multiple superstores and food discounters (such as Aldi and Lidl). For example, research shows that[6]:

- General stores are closing at the rate of one a day;
- Between 1997 – 2002, specialised stores (including butchers, bakers, fishmongers and newsagents) closed at the rate of 50 per week; and

[5] GLA (2001) *The contribution of black businesses to London's economy*

[6] New Economics Foundation (2002) *'Ghost Town Britain'*, London.

- Nearly 30,000 independent food, drink and tobacco retailers (or over 40%) have been lost over the last decade.

1.13 The rate of loss of independent shops also appears to be increasing. The Institute of Grocery Distribution (IGD), has indicated that some 2,157 independent shops went out of business or became part of a larger company in 2004, compared with a previous annual average of c.300.

1.14 The Government's retail planning policies have further impacted on the changing retail landscape over the last two decades. During the 1980s and much of the 1990s the 'laissez-faire' approach to new retail development helped to fuel the move by some retailers to out-of-centre locations. The publication of PPG6 in 1996 and the recently revised PPS6 (2005) has helped to stem the 'wave' of out-of-centre development. It has also forced the major players to revise their business models and look at alternative strategies for corporate growth, which has included:

- Increasing the proportion of their non-food floorspace, to include clothing, electrical goods, household items and books, as well as financial and other services;
- acquiring existing retailers (such as Morrisons purchase of the Safeway portfolio); and/or
- buying into the convenience store sector.

1.15 The latter business strategy has meant that many independent convenience food operators are no longer truly "independent", but are instead operating under the umbrella of the larger multiples, such as Tesco's Express and Sainsbury's Local formats. Research shows that Tesco, for example, has increased its market share of the local convenience store sector to 5.4% in 2005, which is only 0.2% behind market leader Spar[7]. The growth of Petrol forecourt shops has further "squeezed" the independent sector.

1.16 As a result, large retailers are now competing 'head on' with SME and BME retail businesses in urban areas and neighbourhoods. The brand power of the larger players, compounded with consumer perceptions of the relative pricing levels, are likely to have led to the loss of custom to small shops in their catchment areas.

1.17 Whilst retailing one of the most dynamic sectors of the UK economy, and change is inevitable, small shops have an important role providing choice and diversity at the heart of local, often deprived communities. The loss of local independent shops can also cause serious problems in terms of access to food, particularly for people on lower incomes,

[7] Verdict Research: *Neighbourhood Retailing 2006*

those who do not have access to a car. A survey of shopping habits found that there is a strong bias towards use of local shops in less affluent urban areas, including council estates and multi-ethnic low income areas[8]. It also found that people in these locations were more likely to use local shops for their main shopping.

1.18 So if local shops were to close, the effects are more likely to be felt by those who may already struggle to get their food each week. Areas where there are few or no shops selling fresh and affordable food have been described as "food deserts". Immigrant and BME communities are therefore playing a significant and increasing role in maintaining the vitality of the independent retail sector.

BME Businesses: Niche or Mainstream Retailers?

1.19 It is difficult to classify BME businesses, particularly as they appear to serve niche markets, even though most of their customers may be white (e.g. Lebanese grocers in Fulham). Also in diverse areas of population, even a mainstream player like Sainsbury would have a strong BME customer base. Research[3] has classified BME retailers into the following four broad categories:

- ***Traditionalist niche*** – selling goods in a traditional way mainly to the BME community (e.g. Chinese food store);
- ***Conventional mainstream*** – running a conventional shop (e.g. convenience store) and selling to both white customers and BME;
- ***Niche mainstream*** – promotes BME niche products to the mainstream community (e.g. Wing Yip);
- ***Progressive mainstream*** – runs a rapidly expanding business, with white and BME clients, which may do things differently from other businesses, but may not be identifiably a BME business (e.g. Tom Singh's New Look business).

1.20 These traditionalist ethnic niches have limitations to their growth, due to the small size of the minority catchments served, even when some minorities are rapidly growing. Moreover, such minorities are generally poor, which constrains the value of the market. In these circumstances the key to expansion and prosperity is 'breakout', meaning entry into more mainstream markets. There are different alternative market spaces for 'breakout', including:

[8] Clarke I et al. (2004) *Retail Competition and Consumer Choice*, Lancaster University Management School briefing report.

- **Local non-ethnic niche** – small scale enterprises, such as convenience stores and take aways, that have escaped the limitations of serving only the ethnic minority population, but are still restricted in terms of their growth potential by limited neighbourhood markets; and
- **Ethnic non-local market** – those businesses that retain some advantages provided by ethnic networking, but avoid the restrictions of a local market. Examples include South Asian business quarters, such as Southall High Street, Belgrave Road in Leicester, Green Street in London Borough of Newham.

1.21 Hence the niche and progressive mainstream retailers potentially provide the best opportunity for growth and profitability over the long term, perhaps including within their ranks the large-scale retail businesses of the future.

1.22 Street markets are another important area for BME entrepreneurs who face business start-up barriers. Recent research by the New Economics Foundation (nef) quantified - for the first time - the value to local economies and communities around the UK of genuine local enterprise. The research focused on Queens Market in Newham, one of London's most deprived boroughs. The study indicated that the market generates over £13 million for the local economy, with £9 million spent on food. Customers also spent an estimated £1.8 million at shops close to the market. In addition, the report finds that not only are fresh fruit and vegetables on average half the price of supermarkets, four out of five visitors to the market cited choice as their main reason for shopping there. The market provides a space in which entrepreneurs are encouraged, nurtured and supported, with some 70% of businesses owned by BME traders.

1.23 The role of markets in providing suitable business space is underlined by research from the London Development Agency which found that start-up and growth of BME businesses are disproportionately disadvantaged by lack of access to suitable business premises.

BME Retail Sector: Prospects for Growth

1.24 This sections looks at the prospects for growth for BME retail businesses.

Economic Drivers

1.25 The performance of the retail sector is closely linked with the economy. Changes in economic conditions or consumer expectations quickly feed through into retail turnover. Recent research asked a sample of UK-wide BME retailers about their expectations for the future up to 2010[9] and found that they have a slightly more pessimistic outlook than white-owned retail businesses. However, this could reflect the fact that higher proportions of BME businesses are located in problematic inner urban areas.

Competition and Legislation

1.26 As highlighted above, BME retailers are increasingly concerned about the growing competition from multiples. Specifically larger foodstore operators are continuing to increase their market share of the convenience sector in direct competition with SME/BME retailers. They are also selling a wider range of products in their larger superstore, including BME food and other items.

1.27 The profitability and viability of SME / BME retailers is increasingly being squeezed by the larger multiples, as they are better able to obtain greater economies of scale compared to smaller independent and community shops. For example, the largest supermarket chains can obtain concessions on discounts and trading terms, which are not only greater than SME outlets, but are larger than most smaller supermarket chains. The Competition Commission (2000) found that amongst the top 5 lines, smaller multiples paid between 5-10% more for the same items.

1.28 The competitive advantages of the SME/BME retailers over the larger multiples are also being eroded by changes in legislation. The increase in Sunday opening and 24 hour trading by the multiples now means that independents do not necessarily benefit from their longer opening hours.

1.29 The High Street 2015 report also highlighted, that 'red tape' can cost smaller retailers 20 hrs of administration time every month. This, in turn, can be a key factor in deciding whether or not to continue in business[10]. New regulations are regarded as being more onerous and costly for businesses, as they involve time in understanding the new requirements and deciding how to act.

Escalating Costs

1.30 The accumulation of research indicates that BME retailers are primarily concerned about rising costs and specifically the following (in no particular order)[3]:

[9] CRR research comprised a structured sample of 1,000 small and medium sized retailers, of which 66% were from BME communities and the remainder from white-owned businesses. Sample was representative of the major food and non-food trade sectors and UK regions. The 1,000 retailers sampled operated a total of 1,322 stores, with a combined turnover of over £500m.

[10] Rural Shops Alliance/Countryside Agency (2005) *Legislation – Regulation: The red tape burden on rural retailers*, February 2005.

- Long-term low profitability;
- Costs of new business regulation;
- Rising utility costs;
- Increasing wage costs and National Insurance;
- Difficult to recruit good staff;
- rents and upward-only rent reviews

1.31 The cost of premises is viewed as a bigger problem by Asian-owned businesses than businesses in general[1]. This reflects the higher proportion of Asian-owned businesses in the retail sector and the fact that they are often located along prime shopping areas, with the resultant rising cost of owning or renting premises. Property costs are the second biggest cost for retailers, after wages, and they are currently rising much faster than sales growth. This is compounded by the fact that smaller retailers in general do not have the awareness to successfully negotiate a favourable deal, nor is there much assistance to ‘plug’ this knowledge gap[3].

1.32 It is often easier for larger stores to respond to cost increases due to the introduction of the national minimum wage in April 1999 than it is for family scale shops. Scale economies are not easy to find when a single employee is a major fraction of the labour force, and may also be a relative or close friend.

Demographic Trends

1.33 With the passage of time a higher proportion of the ethnic minority population has been born in Britain. The second (and now third) generation BME children are generally better educated than their parents and more “westernised” in terms of their culture and aspirations. This is leading to various challenges for BME retail businesses.

- First, there is a growing “succession problem”, as children are choosing higher paid jobs in other sectors, rather than entering into the family business.
- Second, there is evidence to suggest that the younger generation is spending more time and money in mainstream shops and centres, rather than in BME shops. This is supported by survey evidence for Southall.

Planning & Development

1.34 Problems with parking, transport and deliveries present major problems for smaller retailers. BME retailers identify this as a specific problem, as they are generally located in inner urban areas Research indicates that BME retailers specifically identify parking restrictions as leading to reduced footfall and customers using nearby superstores or shopping centres, which benefit from free or more convenient car parking.

1.35 Other BME businesses also highlighted issues relating to the planning system and the fact that it was difficult to get planning consent to expand their businesses, and/or to identify suitable, alternative sites nearby. Overall, whatever the locational issues, traffic, parking, transport and (to a lesser degree) planning are perceived to create considerable problems for the development of successful retail businesses.

1.36 Nevertheless, there may be opportunities in the future to plan for ethnic-based shopping centre developments. Green Street in Upton Park in London's East End is the Asian equivalent of Oxford Street and Britannia Property Developments is currently planning to build the first UK shopping centre targeted specifically at ethnic minorities. The £30m Emerald Shopping Centre's 8,360 sq.m of retail floorspace, with be made up of small, kiosk type units ranging from 45-55 sqm, with two larger units fronting Green Street. The scheme will be on the site of a former bus station that has been derelict for more than 40 years and rental values of £807 per sq.m on ground floor units have already been achieved.

Crime & Safety

1.37 BME retailers are also concerned about crime and poor behaviour in their areas, and the resultant costs of dealing with crime and the threat of crime[3]. Planners were often perceived as allowing their local areas to suffer from neglect. Clearly if a local area suffers from deprivation, planning blight, or poor standards of behaviour, then this will have a negative impact on businesses in that area.

1.38 Research shows that more BME retail businesses than white-owned businesses perceived threats of violence; crime; break-ins; aggressive customers; and racial hostility as more of a problem. This may again reflect the fact that higher proportions of BME businesses are in inner urban areas.

Investment, Marketing & Technology

1.39 A store refit or modernisation is normally the most visible sign of investment by a retail business. Most retailers normally refit a store when they take it over, but refits thereafter are less regular. BME retailers, in common with white-owned businesses, have a low rate of refitting/re-equipping their shops, as research shows that many have been open for five years or less.

1.40 Marketing by BME businesses is usually limited to window posters and pavement notices, although a small proportion also used printed leaflets, either as newspaper inserts or delivered door-to-door in their local area. Other marketing initiatives, such as promotions, lower pricing, more upmarket merchandise, longer opening hours and increased services were more limited. Few businesses made use of advertising in newspapers, freesheets and radio. However there is a growing interest in providing new services for customers, such as cashbacks, delivery, money transfers and internet services.

1.41 In terms of technology, CRR research shows that smaller retailers naturally find that they are unable to obtain all the benefits of new technology for cost reasons. But this is not always the case, as in certain cases SMEs can take a lead in technology. For example, in 2005 smaller retailers implemented ‘Chip and PIN’ much more quickly than the major multiples, a number of whom were not ready for the final deadline in February 2006 (Bamfield, 2006).

1.42 SME retailers have been slow to develop their own websites, despite the fact that 60% of adults in the UK use the Internet in any one month (MORI, 2005). This probably reflects cynicism about whether it can deliver value to the retailer, rather than technophobia. Although Online Banking use has increased, virtually all retailers still need to visit their banks or post offices regularly to pay in cash and/or cheques.

Access to Funding & Business Advice

1.43 Investment is crucial to the growth of businesses. Recent research has highlighted the problems often experienced by BME businesses (and specifically Black-Caribbean businesses), in accessing funding and business advice.

1.44 The main sources of funding for BME businesses are generally personal savings, family, friends and business acquaintances, whereas white-owned businesses generally rely on bank loans. Research concluded that: “…under-funding remains one of the most intractable problems facing ethnic minority small business owners"[11]. This appears to substantiate research that BME retailers perceive that they will face discrimination or discouragement from financial providers and therefore avoid applying for funding.

1.45 The most significant public business support agencies offering training or ongoing support were seen to be Business Link and enterprise agencies. For example, the Birmingham Chamber of Commerce and local Business Links deliver a programme called SHOPEASY that supports 124 food retailers in the West Midlands. However BME businesses tend to use public business support agencies less and research shows that they are generally "bewildered" by the many Government and locally-funded support programmes. Indeed many businesses only found out that help and advice was available, after they had set up their business.

1.46 Apart from IT retailing, the CRR research showed that BME businesses considered that business support agencies have little available for retailers. Nevertheless, the idea of a single portal, such as ATL (see case study below), to which businesses can relate was strongly endorsed. Existing retailers felt, however, that they would prefer a longer-term business development model rather than specific short-term projects, unless grants for capital sums are possible.

> ATL (Yorkshire) Ltd is a specialist provider of diversity and enterprise support for BME communities. Its aim of linking enterprise, innovation and the community with diversity has led it to develop the Retail Link programme (www.atlretaillink.co.uk). This is aimed at independent retailers, providing business advice to develop competitiveness, innovation, sales and profitability, and to explore diversification. It is supported by the DTI Phoenix Fund.

1.47 A number of BME retailers are also developing wholesale operations to service their own needs and those of other retailers (not necessarily from their own community) based on overseas links or a belief that existing channels were not effective in meeting their needs. The growth of wholesale and import/export business is expected to be a major area for new BME activity over the next few years.

[11] Ram, M & Jones, T. (1998) *Ethnic Minorities in Business*, Milton Keynes: Small Business Research Unit.

Findings & Recommendations

1.48 Although BME retailing is traditionally perceived as being characterised by smaller "7/11" convenience stores, it is in fact an extremely diverse sector and is making a significant contribution to the UK-wide and London economies. Asian-owned businesses accounted for 14% of all London businesses in 2004 and employed c.300,000 persons. Clearly a dynamic economy needs a diverse and vibrant SME / BME sector to meet consumer needs and act as the seedbed for larger companies of the future.

1.49 Despite the importance of the SME / BME retail sectors, it is facing significant challenges, particularly from the growth of multiple and out-of-centre retailing. Traditionally independent retailers benefited from their competitive advantages over larger stores, such as convenience, longer opening hours and a friendly and personal service. However, this has been eroded over the years by the increased market share of the multiples in the convenience sectors, along with changes in legislation relating to shopping hours, Sunday trading and the minimum wage.

1.50 SME and BME retail businesses are therefore dealing with many complex issues and challenges, including:

- limited supply chain;
- a lack of sufficient capital;
- low margins and profitability;
- lack of business experience;
- limited access to funding, business and marketing advice;
- high operating costs, particularly upward only rent reviews and rates;
- the complexities of dealing with 'red tape';
- access and parking restrictions;
- the costs of crime and safety;
- shrinking catchments and market share; and
- difficulty in finding suitable and affordable premises for expansion.

1.51 Nevertheless, despite these challenges, the Competition Commission's referral of the major food multiples and the critical report on retailing from the House of Commons All-

Party Small Shops Group indicates that there could be an increased role for a vital and dynamic SME / BME retail sector.

1.52 The Government's social exclusion unit has also recognised the importance of retailing in tackling exclusion. Food and nutrition are a major public health issue, as poor diet is a major contributor to health problems, which in turn leads to costs to the economy. SME and BME food and grocery retail businesses could therefore be well placed to help tackle the issue of "food deserts" by providing access to affordable and fresh food, particularly in more deprived or remote areas.

1.53 Changing consumer and demographic trends may also benefit SME / BME retail businesses. For example, as the demand on the time of consumers rises, so the demand for convenience shopping could increase over the long term. Also, as consumers grow older they generally become more dependent on local shops and services, helping to increase demand in the SME and BME retail sectors. Some of the key trends identified by research include the rise in the sale of ethical goods, as well as fresh and organic products. Research indicates a rise in the sale of organic goods by independent retailers.

1.54 Evidence suggests that buying from local businesses and using local supply chains can also bring significant benefits to local economies, contributing greatly to the goal of creating successful, sustainable communities.

1.55 Some of key findings and recommendations to be drawn from the research to date are highlighted below:

- It is important for local authorities to maintain and enhance retail diversity through the LDF process, although planning policy on its own cannot guarantee a vital and viable BME sector.
- New planning policies should encourage the concentration of land uses that have high human interaction, namely retail, commercial and civic functions.
- Accessibility is crucial to the success of centres and businesses. Small and independent shops depend on high footfall to maintain a viable business. Local authorities therefore need to provide affordable access to all retail outlets. Access to town centres needs to be more convenient and less expensive than remote locations. Charges for access to, or parking at, edge- and out-of-town retail centres may be necessary to ensure a level playing field with town centres.
- SME / BME retailers face rising operating costs, particularly in terms of upward only rent reviews and increased rates. Planning could help to promote greater opportunities for locally-owned stores. For example, just as thresholds are set for affordable housing, so this approach could be extended to make retail developers guarantee long-term affordable premises for locally

owned stores. This is a recommendation developed by the Town & Country Planning Association[12].

- Rate relief for smaller retailers and priority assistance given to locally owned high street shops competing with larger superstores opening nearby.
- Street markets can play an important part in ensuring diversity, supporting local economies, and encouraging human interactions. The value of this should be recognised and careful consideration given to their location. A successful and vibrant market will help attract custom for surrounding shops and community facilities, as well as encouraging business start-ups.
- The first shopping centre development targeted specifically at ethnic minorities on Green Street in Upton Park – Emerald Shopping Centre - could lead to similar developments in BME communities across London and the UK, if it proves to be commercially viable.
- There is a lack of integration and accessibility to business support for SME and BME retailers across the country and locally. There needs to be a simplified framework of business support so that it can be accessed more easily. Organisations such as ATL in Yorkshire which act as portals for business services for retailers have been generally welcomed by BME businesses, as it was felt that no one had to become an expert in business support programmes to receive help.
- RDAs, local authorities and/or town centre partnerships should develop business support services and promote them widely to independent businesses[13]. Examples of such services could include advice on buying and merchandising strategies; market research; window display techniques; store layout; customer service training; advice on business accounting and management; and establishment of on-line e-commerce capability. Support could also include promotion of grants which are available for business development or improvement of premises, and assistance with the preparation of applications.
- Local authorities should collaborate with private property owners and occupiers in secondary shopping areas, through the mechanism of town centre partnerships, to identify particular ‘niche’ markets appropriate to the area[5]. Building owners should then seek to attract specialist destination retailers and services, which fit into and give effect to the overall plan for the future of the area agreed with the local authority; even if this means accepting lower rents in the short term.

1.56 Research has indicated that few smaller independent retailers work together with other neighbouring traders to improve the health of their own high street. Thus organisations such as the Association of Convenience Stores (ACS) may have an increasingly important role to play, as may the different business models emerging from the Business Improvement Districts (BIDs) pilots and Town Centre Management. All town centre interests should provide encouragement to the creation of, and support for, a body that can

[12] TCPA Policy Statement (July 2005) *Planning for Accessible and Sustainable Retail*, www.tcpa.org.uk

co-ordinate regeneration efforts and promote a clearly defined vision for the future role of the town centre, where secondary shopping areas are given equal weight to the prime area. Property owners and occupiers should be encouraged to join and support such partnerships.

[13] National Retail Planning Forum (November 2004) *'The Role and Vitality of Secondary Shopping – A New Direction'*

APPENDIX 18:

RETAIL & LEISURE TRENDS

CONTENTS

1. CURRENT MARKET CONTEXT

1.1 To put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing in West London. A number of trends are likely to have a bearing on the future pattern of retail provision in the three Boroughs, and the opportunities arising from development proposals. This section examines key trends and drivers for change in the retail industry. We outline the key national trends in retailing and service provision of relevance to West London drawing from a range of published data sources, including research by Verdict Analysis, Mintel and the New Economics Foundation.

Demographics

1.2 Over the last 20 years UK population has increased at about 0.3% pa but the number of households has increased by nearly three times that rate, as household size has decreased with smaller families, more divorces, people living longer etc. The population is also ageing. These trends are forecast to continue and will affect spending habits – how much we spend, on what and where.

1.3 Over the next 20 years the over 60's age group is expected to grow by 5.3m or 41% and the Under 60's age group by only 4%. Older shoppers have a younger mindset than in the past, are more fashion aware and financially better off as a result of house price growth as well as income growth (but pensions will be a concern). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Younger shoppers will have higher University fees to pay, will experience higher housing costs, will be more computer literate and spend more on-line, and will spend more on entertainment/leisure so they may have less to spend in the retail property sector.

Income and Expenditure

1.4 Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. Overall retail expenditure has increased by about 4% pa in real terms over the last 20 years, with most of this growth on comparison goods rather than convenience goods, where growth has been less than 1% pa. Comparison goods growth has been close to 5% pa over the last 30 years, over 6% pa over the last 20 years and even stronger over the last 10 years. These strong trends are not expected to continue in the foreseeable future due to current high levels of consumer debt, an already low savings ratio and a weaker housing market. Over the next 5-10 years the latest economic forecasts suggest that comparison goods expenditure growth will be about 3.5-4.5% pa.

1.5 With longer working hours for many, shop opening hours in the larger centres have been extended and Sunday is now one of the strongest trading days in the week. This has implications for where retail expenditure is concentrated and the nature of some shopping trips which are considered to be a quasi leisure experience. Longer working hours, plus the Internet and broadband technology have lead to a huge growth in non-store shopping, but from a small base. Total non-store trading including mail order and the internet is currently estimated to be about 2.5% of convenience goods spending and about 6% of comparison goods spending. The latest forecasts suggest continuing strong growth over the next 5-10 years before a plateau is reached at about double current proportions of expenditure.

Sales Density Increases

1.6 Although hard quantitative evidence is limited, comparison businesses in particular have over time increased sales densities by achieving improvements in productivity in the use of floorspace. PPS6 (paragraph 2.34) requires that quantitative need/capacity assessments have regard to a realistic assessment of such improvement. Analysis of past data is difficult as over the last 20 years sales densities increases have been affected by changes in the use of retail floorspace, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-of events like Sunday Trading and longer opening hours, and the very strong growth of retail expenditure relative to the growth in floorspace. In the future growth rates of 1.5-2.5% pa seem likely to be achieved for comparison goods, with minimal growth in sales densities for convenience goods.

Employment

1.7 Over the last 20 years retail expenditure has increased at about 4% pa, but retail employment has increased much more slowly. Total employees in employment have increased from 2.1 million to 2.9 million, an increase of 1.75% pa. However, this growth has been in part time employees. Full time equivalent (FTE) employment has hardly increased at all, from about 2 million to 2.2 million, a 0.5% pa increase. Over the next 15 years Experian Business Strategies expect an overall decline in FTE employment with only a marginal increase in part time employment.

Location

1.8 Strong income and expenditure growth has affected retailing in another important way – the rise in car ownership and mobility. Over the last 25 years the number of households owning one or more cars has increased from about 55% to about 75% and the number with two or more cars has nearly trebled from 11% to 30%. Households are now much more mobile than they were and therefore their choices of where to shop and the distances they can travel are much greater. These trends will continue but the rate of change may well diminish.

1.9 Increased mobility and affluence has favoured larger centres over smaller centres. As a result larger centres have increased in size and importance relative to smaller centres which has further reinforced the attraction of larger centres to more mobile shoppers. Smaller centres have, therefore, lost market share and have seen much less new development than the overall rate of expenditure growth would imply. This is recognised by PPS6, which urges local authorities to be pro-active in trying to encourage development in smaller centres.

1.10 Increased mobility and affluence has also stimulated out-of-centre development, which has grown much more rapidly than town centre development. Over the last 20 years the majority of retail development has been in edge or out-of-centre locations. This has lead to increasingly restrictive planning policy in favour of town centres over the last 10 years, but only recently has the growth in out-of-centre development started to slow. This slow down is expected to continue, but Verdict still expect sales at out-of-centre locations to increase at a faster rate than at in-centre locations.

1.11 PPS6 reinforces the Government's pro town centre. The sequential site test is still a cornerstone of retail planning policy, favouring town centre sites and necessitating consideration of the disaggregation of retail park proposals so that smaller sites are considered. However, it is also recognised that individual retailers business model are also relevant. Disaggregation of a retailer's proposed store does not now need to be considered if it would adversely affect the retailer's business model and increase costs.

Size of Units

1.12 The growth of multiple traders and increased competition between companies has meant that the retail structure is increasingly dominated by large companies requiring larger shop units. Shopping centres and out-of-centre development that has been able to accommodate this demand for larger sized units (typically 500-2,000 sq m or larger) have grown in importance, reinforcing the trend of higher order centres and out-of-centre retailing growing in relative importance, i.e. polarisation in the retail hierarchy.

1.13 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (green grocers, butchers, fishmongers, bakers etc), and a large increase of superstores. These trends may well weaken in the future due to possible market saturation of large foodstores and concerns over lack of competition due to the market dominance of a few key multiples.

Foodstores

1.14 A by product of the restriction of new development of large foodstores is the growth in applications to extend existing stores and the changing composition of floorspace within existing foodstores. There is an increasing emphasis on the sale of comparison goods at the expense of convenience goods, as expenditure growth rates for comparison goods are much higher than for convenience goods and margins are greater, although sales densities are often lower. This trend poses an increasing threat to smaller centres, as larger foodstores will increasingly sell a wider product range of day-to-day convenience and comparison goods and services.

Shopping and Leisure

1.15 Due to increased affluence and mobility, and the rise of the internet, shoppers no longer merely shop to satisfy needs, they increasingly shop to satisfy wants as well. Retailing in the higher order centres and the more attractive smaller centres is changing and arguably becoming more of a quasi leisure experience. Leisure spending growth is continuing to outstrip that of retail. Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplexes in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors. Pedestrianised streets and covered retail areas are also important in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.

1.16 A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable; town centres can offer consumers a much more vibrant atmosphere in which to eat and drink; and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade' and the ability to capitalise on proximity to businesses and shoppers.

Arts and Culture

1.17 Culture is a wide ranging term which brings together a range of interests and activities enjoyed by people including sports, media, entertainment, the arts, museums, libraries and tourism. Culture also encompasses the built heritage, parks and countryside. Overall, it is described as allowing people to celebrate local distinctiveness and traditions – the values that make a community what it is.

1.18 Research by the Arts Council in 2003 looking at attendance, participation in and attitudes towards the arts revealed that levels of attendance and participation in arts and cultural activities have remained high against a backdrop of increased competition from other leisure activities. The proportion of people attending at least one arts or cultural event rose from 79% in 2001 to 80% in 2003.

Tourism

1.19 Tourism is one of the largest industries in the UK, accounting for 3.5% of the UK economy and worth approximately £74.2 billion in 2003. Around 2 million people (7% of the working population) work in the tourism sector in the UK. According to UKTS, UK residents took 126.6 million trips in 2004 and spent over £24 billion. This represents a 19% decrease in trips on 2003 and an 8% decline in expenditure over the same period. However, overseas visits to the UK are increasing, with a 9% increase between 1999 and 2004 and an increase in spending of 4%.

1.20 Some of the key factors influencing tourism trends are:

- Growing disposable incomes, increased overseas travel supplemented by short breaks in Europe and the UK;
- Increasing expectations in product quality;

- An ageing population with more flexibility for off peak travel;
- Changing consumer behaviour, with more frequent, short breaks and special interest holidays;
- Decreasing interest in traditional UK seaside holidays with more interest in urban destinations;
- Growing environmental concerns leading to more interest in walking, cycling, wildlife and remoter locations;
- Use of Internet to research, plan and make bookings direct with businesses at the destination; and
- A more volatile global environment, which can increase the attractiveness of UK domestic products but also lead to increased competition for our core markets.

1.21 National visitor trends in 2004 reported that the 2,099 visitor attractions in England showed an increase in attendance of 1% between 2003 and 2004. The majority of categories showed growth in 2004. The overall increase was driven by a recovery among urban attractions (+3%), which had experienced a slight decline in 2003.

Summary

1.22 National retail trends indicate a continued growth in incomes and expenditure, albeit not at such strong levels as in the last 15-20 years. The growth in expenditure is focused on comparison goods, although small increases are expected in convenience goods expenditure as quality branding is developed in most major foodstores.

1.23 Increased car ownership has resulted in greater household mobility and therefore the choices for shopping centres to visit and the distances that can be travelled are much greater. This national trend is perhaps not as evident in London where public transport networks are vast and often quicker than car travel due to high levels of congestion. Many people do, however, prefer the car and residents in West London will choose this mode of transport to visit retail destinations, particularly out of centre retail and leisure destinations which are not accessible by alternative means. Internet shopping has grown phenomenally in the last few years and looks set to continue in certain sectors.

1.24 The foodstore operators have continued to evolve their formats and offer. With restrictions on out-of-centre stores growing, and changing socio-economic trends, several large operators have returned to the high street in recent years with small convenience stores. Operators are also seeking to extend their comparison goods offer, turning stores into variety or mini department stores. This trend in out-of-centre locations could pose a threat to smaller centres, where the large out-of-centre stores become one stop shopping destinations negating trips to the town centres.

1.25 There has been a continued polarisation towards larger centres and the provision of larger stores in these larger centres. Where smaller centres have been unable to diversify their offer or create niche markets they have suffered. The focus on urban renewal has increased demand for town centre sites for a wider range of land uses. Mixed-use retail and leisure development has proved to be a real growth area in town centres. These trends present significant opportunities and challenges to the West London centres. The centre is well placed to benefit from forecast spending growth but it needs to adapt if it is to capitalise on these opportunities, and maintain and enhance its position within the wider region.

1.26 In the commercial leisure sector, changing social and demographic trends and increased personal disposable income will fuel sustained growth in mainstream commercial leisure activities, including cinemas, bars, restaurants and post deregulation, significant additional investment in the gambling and entertainment industry. As a consequence of market trends and policy, many main stream leisure activities, including the cinema, are increasingly returning to traditional town centre locations.